Lobbyist Disclosure Electronic Filing Contribution Reporting System

User Manual
July 22, 2008

Contents

Introduction 3

General Filing Requirements 3
Who Must File 4
Filing Deadlines 4
Where to File Forms 4
Review and Compliance 4
Penalties 4
Public Availability 5
Understanding Electronic Filing 5
System Requirements 5
System Overview 5
Where to Get Help 6

Accessing the System 8

Account Prerequisites 8
Obtaining a Registrant ID and Password 8
Obtaining a Lobbyist ID and Password 9
Locating Your ID Number 10
Locating Registrant ID Numbers 10
Locating Lobbyist ID Numbers 12
Locating Your Password 14
Locating Registrant Passwords 14
Locating Lobbyist Passwords 16
Signing In to the System 18

Managing Lobbyist Accounts 20

Reviewing Lobbyist Accounts 21
Verifying Previously Registered Lobbyists 22
Correcting Email Addresses 25
Adding New Lobbyist Accounts 27

Activating Lobbyist Accounts 29

Updating Account Information 33

Updating Registrant Contact Information 34
Updating Lobbyist Account Information 36
Updating Lobbyist Contact Information 37
Updating Passwords 38
Updating Security Questions 39
Requesting Employer Transfers 40

Working with the Contribution Form 42

Creating a New Form 43
Importing XML Data 50
Using a Database to Create an XML Import File 50
Using Microsoft Excel to Create an XML Import File 50
Importing XML files into the Contribution Form: 52
Using Saved Forms 55
Filing Your Form 58

Tutorials 61

Appendix 62

Line by line Instructions 62

Troubleshooting Guide 64

Viewing the Training DVD on a Computer 64
Accessing the System 65
Importing XML Data 66
Correcting Date Fields 67

Frequently Asked Questions 71

Accessing the Contribution System 71
Filing Contribution Reports 72
Working with the Contribution Report Form 72
Reviewing House and Senate Gift and Travel Rules 73
Locating Filed Contribution Reports 73

Index 75

Introduction

This manual will explain the filing requirements of the LD-203 Contribution Reports and provides step by step instructions for completing and filing electronic Lobbying Disclosure Contribution forms. It is available online from the Contribution Reporting website, and in a printable format. The table of contents and comprehensive index allows you to locate specific functions you may need help with. All major topics related to the contribution system also have an online tutorial that may be viewed in your browser by clicking on the link located next to the title.

The online version of this manual is interactive and you can select how you want to locate information by using the tabs that are displayed at the top of the screen. The Contents tab displays a list of sections on the left hand side of the screen. You can display the topics for each section by clicking the arrow displayed next to the section name. To collapse the list of topics, click the arrow again. The Index tab displays a list of topics on the left hand side of the screen in alphabetical order. When you click on a topic name, the information is displayed in the right hand panel.

See Tutorials for a special message from the Clerk and Secretary

General Filing Requirements

The Lobbying Disclosure Act of 1995, as amended (2 U.S.C.§ 1601 et. Seq.), requires lobbying firms and organizations to register and file reports on lobbying and certain contributions and expenses with the Secretary of the Senate and the Clerk of the House of Representatives.

The Registration form (LD-1) is used for the initial registration under Section 4 of the Act (2 U.S.C. § 1603). The Report Activity form (LD-2) is used for complying with the quarterly reporting requirements of Section 5 of the Act (2 U.S.C. § 1604). The contribution form (LD-203) is used for the semi annual disclosure of certain contributions pursuant to Section 5 of the Act (2 U.S.C § 1604(d)).

The topics listed below provide general guidelines about reporting contribution activity with the U.S. House of Representatives and the U.S. Senate.

Guidance: http://lobbyingdisclosure.house.gov/amended_lda_guide.html

Who Must File

Active registrants and individuals who have been listed as active lobbyists by their employer-registrant on the Registration and Reporting forms must file a semi annual report on Form LD-203 for each semi annual period in which they remain active.

In the case of a registrant, "active" means not having filed a valid termination report for all clients. In the case of a lobbyist, "active" is an employee listed on any registrant's registration or reporting form and who has not been terminated by the Registrant through their listing of the lobbyist on Line 23 of the reporting form as being removed. If a lobbyist is active for any part of or for all of a semi-annual period, he or she must file a contribution report.

Filing Deadlines

The coverage periods for the semi annual reports are January 1 through June 30, and July 1 through December 31. The semi annual contribution report is required to be filed no later than 30 days after the end of the semi annual period beginning on the first day of January and July, or on the first business day after such 30th day if the 30th day is not a business day. The filing deadlines for contribution reports are:

- July 30 * for the January 1 – June 30 mid year reports;
- January 30 * for the July 1 – December 31 year end reports.

*If the deadline falls on a weekend or holiday, the report is due the following business day.

Where to File Forms

Section 5 of the LDA was amended to require the mandatory electronic filing of all documents required by the LDA. Registrants and lobbyists must file the contribution form with the Office of the Clerk of the U.S. House of Representatives and the Secretary of the U.S. Senate. The contribution form provides the ability to electronically file the form with both the Clerk of the U.S. House and the Secretary of the U.S. Senate using an ID and password.

The only exception to mandatory electronic filing is for the purpose of amending reports in the format previously filed, or for compliance with the Americans with Disabilities Act. All electronic lobbying disclosure forms provide usability for people with vision impairments who have the appropriate software and hardware. If you have questions regarding additional ADA accommodations, please contact the Senate Office of Public Records at (202) 224-0758.

Review and Compliance

The Clerk of the House and the Secretary of the Senate must review, verify, and request corrections in writing to ensure the accuracy, completeness, and timeliness of registrations filed under the Act.

Penalties

Whoever knowingly fails: (1) to correct a defective filing within *60 days* after notice of such a defect by the Secretary of the Senate or the Clerk of the House; or (2) to comply with any other provision of the Act, may be subject to a civil fine of not more than $200,000. Whoever knowingly and corruptly fails to comply with any provision of this Act may be imprisoned for not more than 5 years or fined under the title 18, United States Code, or both.

Public Availability

The Act requires the Secretary of the Senate and the Clerk of the House of Representatives to make all documents filed under the LDA available for public inspection over the Internet as soon as technically practicable after the report is filed.

Understanding Electronic Filing

Access to the Contribution Reporting system is based on the current LDA registration process for the House and Senate. Self employed lobbyists and organizations must first register to lobby, and provide a list of the individuals who will be lobbying for each client. When a registration is accepted, Senate and House ID numbers are assigned. Registrants will continue to use their House and Senate ID numbers to file their contribution forms. To meet the new filing requirements, employed lobbyists will be assigned a single lobbyist ID number that will be used to file their contribution forms with both the House and Senate. Each user has an account that is associated with their User ID that contains contact and registration information to pre-populate the forms.

To simplify the contribution filing process, a list of lobbyist names has been created for each registrant from previously filed LDA forms. This list contains information about each employee's account and password status. Registrants must verify each employee for their organization before they can be granted access to the system. Registrants will also be able to update the lobbying status of each employee and add new names when needed.

This system is web-based and all users must sign in to access a contribution form or update contact and registration information. The form is pre-populated based on the user ID and will alert you if entries on your form are not valid. When your form is complete, it will be filed electronically using your User ID and password. The system is automated and designed to allow registrants and lobbyists to manage their own account information and filings. Account and filing status communications will be sent to each user via email. Lobbyists will also be able to set their own passwords and retrieve them automatically if they forget them.

See Tutorials for more information on the electronic filing system

System Requirements

This system works on both Windows and Macintosh computers. There is no additional software required; you may use this system with any standard browser and your user ID and password.

System Overview

To access the system and file your forms, you must first sign in with your user ID and password. If you are a registrant, you will continue to use the same ID and password that is used to file Lobbying Registration and Reporting forms. If you are an employed lobbyist, you will use the ID assigned by the contribution system and create your own password.

When you are signed in successfully, you should confirm your contact information. Email addresses are essential as all system communications regarding your ID and password, as well as the status of your filings, will be sent to the email address on file for each account.

Each time you sign in to the system, you establish an editing session for the contribution form. The contribution form is interactive and the system will build a unique filing for each reporting period. While you are signed in, you will have the ability to create a new filing, open a saved filing and append it, or retrieve a previously filed form and amend it. Registration information such as the registrant name, Senate, House, and Lobbyist ID's, as well as the contact information you entered for your account, will be pre-populated on the form for you. Once a filing has been created, it will be saved on the system so that you can append it as many times as needed until the report is ready to be submitted.

The signing and submission process has been streamlined from previous lobbying disclosure forms. Because you have already signed into the system with your user ID and password, the system will include this information when you submit the form. You only need to click a single button to file your form with both the House and Senate. When your form has been received, a confirmation message will be displayed that includes a reference number, timestamp, your name, and the year and period you are filing for.

Once a report has been submitted you will receive an e-mail disclosing the status of your filing. The three main messages are approved, pending or failed. If the message states your filing has been approved your report has been successfully filed and will be available to the public over the internet. If the report states your filing is pending, there may be some slight discrepancy between previously submitted information and what is on the form. The House Legislative Resource Center will review the filing and notify you if it was accepted or rejected. If it was rejected, please review the message carefully as it will contain instructions on how to correct the filing so it can be re-submitted successfully.

Where to Get Help

Section 6 of the Lobbying Disclosure Act requires that the Secretary of the Senate and the Clerk of the House provide guidance and assistance on the registration and reporting requirements. A Guidance document has been issued that is available on the Clerk and Secretary's lobbying disclosure websites.

Guidance: http://lobbyingdisclosure.house.gov/amended_lda_guide.html

For step by step instructions on how to use the contribution system and form:

- Review the user manual that is available from the Help tab on the contribution system;

For information on the content that should be entered in the Contribution form fields:

- Review the appendices of the user manual for line by line instructions;

For help with your Registrant ID or password:

- Use the links on the sign in page to locate your registrant ID;
- Use the links on the sign in page to request your password from the Office of Public Records via email;

For help with your Lobbyist ID or password:

- Use the links on the sign in page to have your ID and password sent to you via email;
- If you are locked out of the system, contact the Legislative Resource Center via email or by phone at (202) 226-5200 to reset your password.

For general technical difficulties:

- Review the Troubleshooting Guide in this manual. Solutions to commonly reported problems will be listed in this section.

If you are experiencing difficulties and cannot find the answer in the step by step instructions, FAQ's, or troubleshooting sections of the User Manual, you can contact us via phone:

Legislative Resource Center
B-106 Cannon House Office Building
Washington, DC 20515
(202) 226-5200
lobbyinfo@mail.house.gov

Senate Office of Public Records
232 Hart Senate Office Building
Washington, DC 20510
(202) 224-0758
lobby@sec.senate.gov

Before contacting, have the following information available:

- Registrant or lobbyist name and ID number;
- Computer operating system;
- Error codes or messages that are displayed when you are working with your form. It is also helpful if you can make note of the specific steps you were doing when the error occurred;
- The name and contact information for your IT support person.

See Tutorials for more information on where to get help

Accessing the System

To access the Contribution Reporting System:

- Go to https://ld.congress.gov:4433/LC/;
- Sign in with your ID and Password::
  - Registrants must sign in using their **Senate ID** and **Password**;
  - Lobbyists must sign in using their **Lobbyist ID** and **Password**;

All passwords for the Lobbying Disclosure filing system are case sensitive and must be entered correctly to access the system. If you forgot your ID or password, there are links to locate your ID or password below the appropriate fields on the Home page.

See Tutorials for registrant and lobbyist account management demonstrations

Account Prerequisites

Before a filer can access the Contribution Reporting System to file the Contribution form, they must have a unique ID and password. Registrants must sign in using their Senate ID and password; employed lobbyists must sign in using the ID assigned by the Contribution Reporting System and the password created by the lobbyist when the account was activated.

If you do not have an ID and Password, please review the steps listed below to obtain one.

Obtaining a Registrant ID and Password

Registrant accounts in the contribution system are unique to each lobbying firm and self employed lobbyist. Registrants are verified by the Senate and assigned an ID and password when they register to lobby for the first client. If you have not registered previously for any client, you may apply for a password online using the link below:

Online Password Request Form

If you are experiencing problems with the Senate Password Request form or need additional information about your password, please contact:

Senate Office of Public Records
232 Hart Senate Office Building
Washington, DC 20510
(202) 224-0758
lobby@sec.senate.gov

Obtaining a Lobbyist ID and Password

Employed lobbyists are assigned a unique ID when they are registered with the House and Senate to lobby and added to the Contribution Reporting System by the person in your organization who manages the registration and reporting filings. When you have been added to the system by your employer an activation email is sent to you automatically. You will not be able to sign in to the system until you have completed the steps to create your password.

If you did not receive your activation email, one of several things may have occurred:

- Your account has not been verified by the registrant yet;
- Your account has been verified, but there is a typo in the email address;
- Your account has been verified and the email address is correct, but your network thinks email from our server is junk mail.

Please see the person in your organization that is responsible for registering you as a lobbyist to verify your account and email address. If your account has been verified and the email address is correct, please contact your IT support person to verify that the email is not being filtered as junk mail.

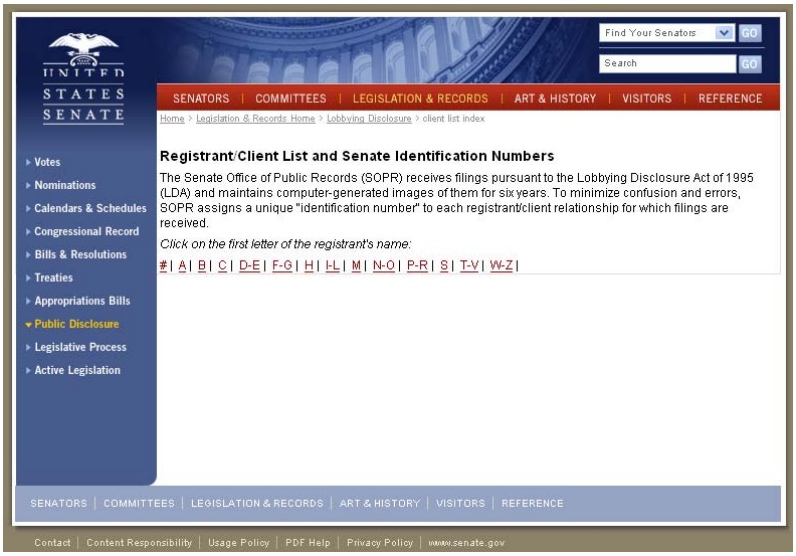
Locating Your ID Number

If you forgot your User ID number you can locate it using the appropriate link on the Congressional Reporting System home page.

Locating Registrant ID Numbers

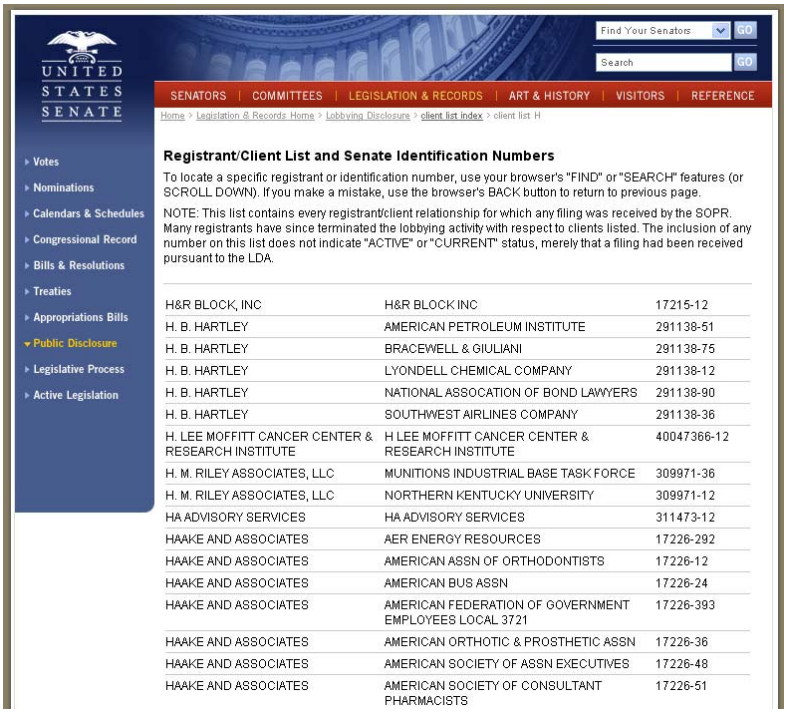
To locate a registrant ID number:

- Click on the **I forgot my registrant ID** link in the **Sign In** section of the **Home** page:



An index of all registrant names is displayed;

- Click on the first letter index of the registrant name:



H&R BLOCK, INC	H&R BLOCK INC	17215-12
H. B. HARTLEY	AMERICAN PETROLEUM INSTITUTE	291138-51
H. B. HARTLEY	BRACEWELL & GIULIANI	291138-75
H. B. HARTLEY	LYONDELL CHEMICAL COMPANY	291138-12
H. B. HARTLEY	NATIONAL ASSOCATION OF BOND LAWYERS	291138-90
H. B. HARTLEY	SOUTHWEST AIRLINES COMPANY	291138-36
H. LEE MOFFITT CANCER CENTER & RESEARCH INSTITUTE	H LEE MOFFITT CANCER CENTER & RESEARCH INSTITUTE	40047366-12
H. M. RILEY ASSOCIATES, LLC	MUNITIONS INDUSTRIAL BASE TASK FORCE	309971-36
H. M. RILEY ASSOCIATES, LLC	NORTHERN KENTUCKY UNIVERSITY	309971-12
HA ADVISORY SERVICES	HA ADVISORY SERVICES	311473-12
HAAKE AND ASSOCIATES	AER ENERGY RESOURCES	17226-292
HAAKE AND ASSOCIATES	AMERICAN ASSN OF ORTHODONTISTS	17226-12
HAAKE AND ASSOCIATES	AMERICAN BUS ASSN	17226-24
HAAKE AND ASSOCIATES	AMERICAN FEDERATION OF GOVERNMENT EMPLOYEES LOCAL 3721	17226-393
HAAKE AND ASSOCIATES	AMERICAN ORTHOTIC & PROSTHETIC ASSN	17226-36
HAAKE AND ASSOCIATES	AMERICAN SOCIETY OF ASSN EXECUTIVES	17226-48
HAAKE AND ASSOCIATES	AMERICAN SOCIETY OF CONSULTANT PHARMACISTS	17226-51

A list of all registrant names that begin with the letter you selected will be displayed along with the full Senate ID number.

Note: Your Senate User ID is all of the numbers before the hyphen.

Locating Lobbyist ID Numbers

To locate lobbyist ID numbers:

- Click on the **I forgot my lobbyist ID** link in the **Sign In** section of the **Home** page;

- Enter your email address in the appropriate field and click the **Find ID** button;

A message will be displayed when your ID has been sent to the email address on file for your account.

From: **Contribution Accounts** <LCAccounts@mail.house.gov>
Date: 18 Jun 2008 10:29:29 -0400
Subject: Lobbying Disclosure Electronic Filing – Your User ID
To: ltest.twenty@gmail.com

Lobbying Disclosure Electronic Filing
United States Congress

Your requested account information is listed below:

User ID: aaaa41522

https://ld.congress.gov:4433/LC//home.aspx

Please do not respond to this e-mail. This mailbox is unattended.

Note: This feature is dependent on the email address for your lobbyist account. If you do not enter it correctly, the system will not be able to locate your ID.

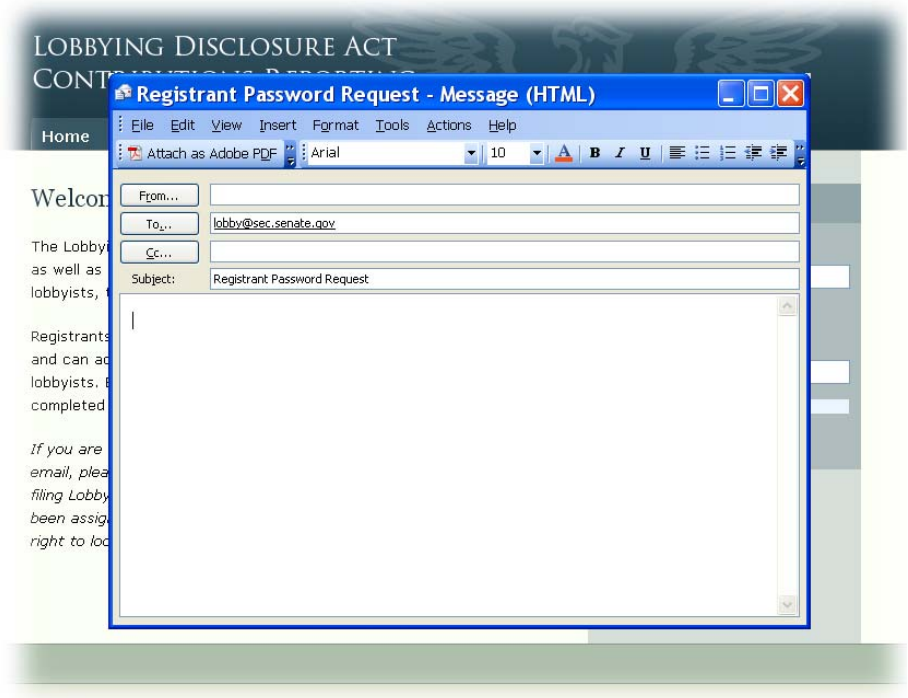
Locating Your Password

If you forgot your password you can locate it using the appropriate link on the Congressional Reporting System home page.

Locating Registrant Passwords

To request the password for a registrant in the **Sign In** section of the **Home** page:

- Click on the **I forgot my registrant password** link in the **Sign In** section of the **Home** page:



An email window is displayed with the Senate email address and subject line pre-populated;

- Enter your request in the body of the email.

Note: Registrant password requests will only be sent to the email address on file for that registrant. If you are not one of the official points of contact on file for the registrant, you need to contact the person internally to either obtain the password, or request that he/she send the email requesting the password

Locating Lobbyist Passwords

To locate the password for a lobbyist:

- Click on the **I forgot my registrant password** link in the **Sign In** section of the **Home** page:

- Enter your lobbyist ID in the **User ID** field and press the **Find Password** button:

The security question field is displayed. You may select one of the three questions you set when you activated your account by selecting it from the pull down menu;

- Enter the answer to this question and press the **Find Password** button:

- If you answered the question correctly, an email with your password will be sent to the address on file for your account;

Note: If you did not answer the question correctly the system will allow you to try two more times. After that your account is locked and you must contact the Legislative Resource Center to unlock it.

Signing In to the System

To sign in to the Congressional Reporting System:

- Go to https://ld.congress.gov:4433/LC/;

- Enter your user ID number and password in the appropriate fields on the **Please Sign In** section of the Home page and click the **Sign In** button;
  - Registrants must sign in using their **Senate ID** and **Password**;
  - Lobbyist must sign in using their **Lobbyist ID** and **Password**;

When you have logged in successfully, a profile page is displayed. Tabs are available for all users in the header that allow you to access specific screens so that you can update the information that is pre-populated on the contribution form, or access the form to create a new filing. If you are a registrant, you will also be able to view and manage the names of all the employees that are registered to lobby for your organization.

All passwords for the Lobbying Disclosure filing system are case sensitive and must be entered correctly to access the system

Managing Lobbyist Accounts

Two steps must be completed before lobbyists can sign in to the system and file contribution forms:

- The registrant must verify the name of each employee who is registered to lobby. If an employee is not listed, the registrant must add them to the system;
- The lobbyist must complete the steps to create a password and set their security questions.

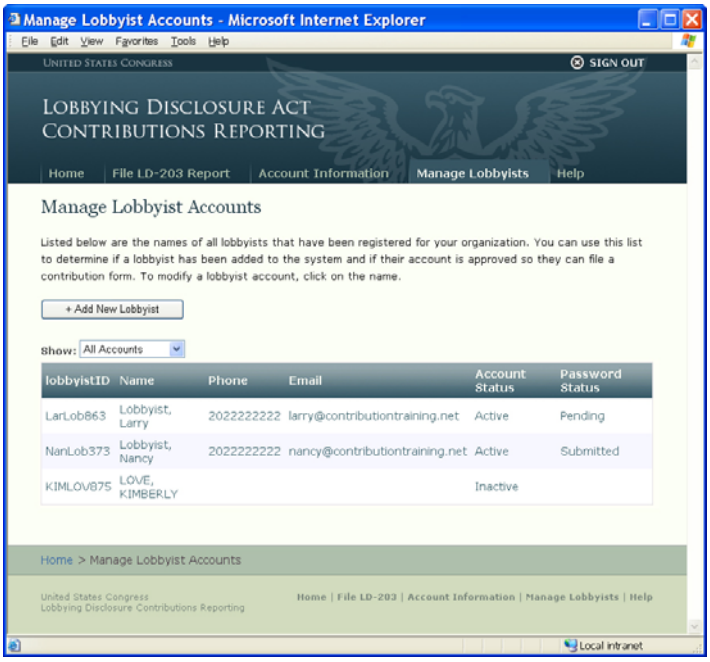
Each time the registrant verifies the name of an employee, or adds them to the system, an email is sent to that lobbyist. When the lobbyist completes the steps to set their password, their account is activated and they can sign in and file their forms.

Please review the sections listed below for step by step instructions.

See Tutorials for registrant and lobbyist account management demonstrations

Reviewing Lobbyist Accounts

The Manage Lobbyist screen will allow you to view a list of all the employees that were actively registered to lobby on the registration or reporting forms. You can use this list to verify if your employees have been registered and whether the account has been activated so that they are able to sign in and file their contribution reports.



An explanation of the Account and Password Status is listed below:

Account Status	Description
Inactive	The lobbyist account is not currently active.
Active	The lobbyist account is active.

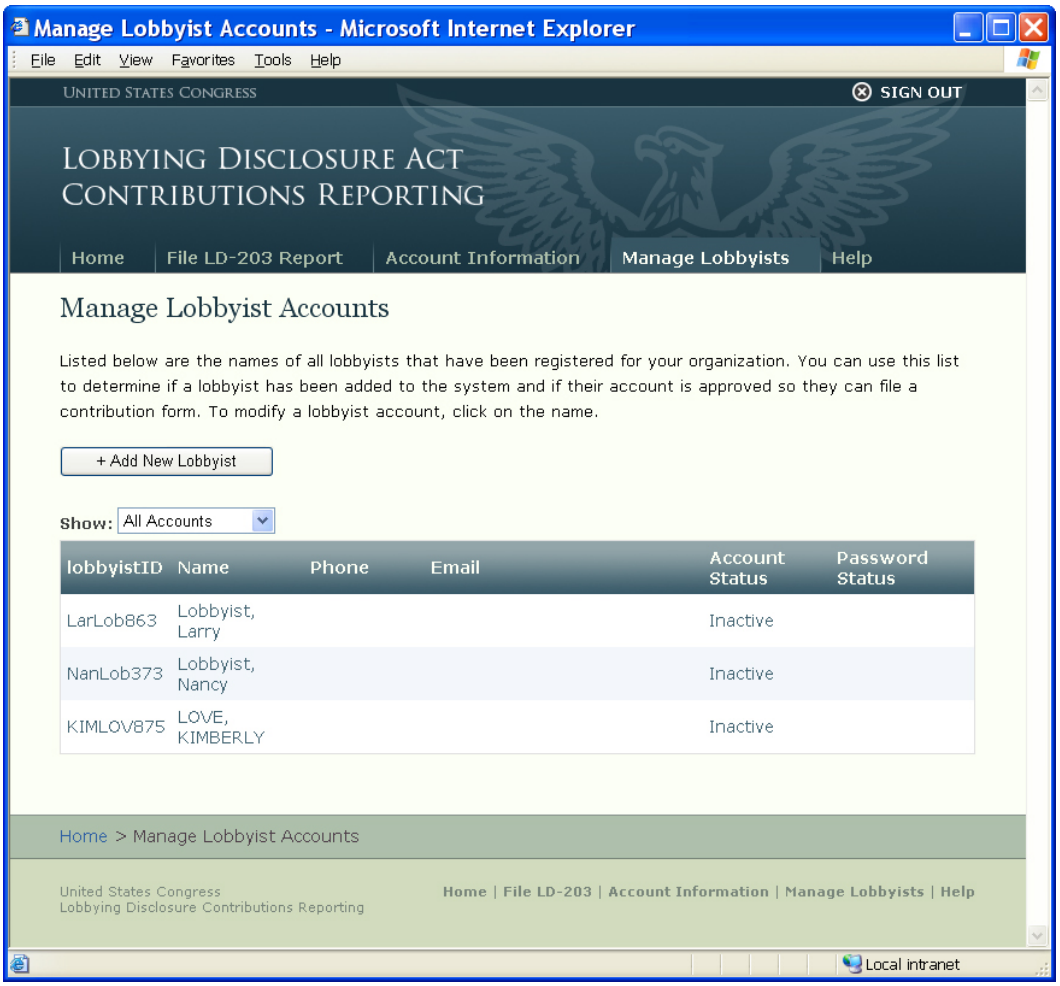
Password Status	Description
Temporary Password	An activation email has been sent to a registered lobbyist, but the account is waiting for the lobbyist to respond to the email and set the password.
Active	The registration for the lobbyist has been verified and the password set so the lobbyist is able to sign into the system and file a contribution form.
Submitted	An activation email has been sent to a new lobbyist but the account is waiting for the lobbyist to respond to the email and set the password.
Pending	A new lobbyist has been added to the system, and the password has been set, but the House Legislative Resource Center is reviewing the registration.
Rejected	A new lobbyist has been added to the system, but the House Legislative Resource Center has reviewed the registrations and rejected the account.
Locked	The wrong password was entered more than 10 times and the account has been locked.

Verifying Previously Registered Lobbyists

To activate an account, you must verify the name and email address so the system can alert them via email that a password must be created for their account.

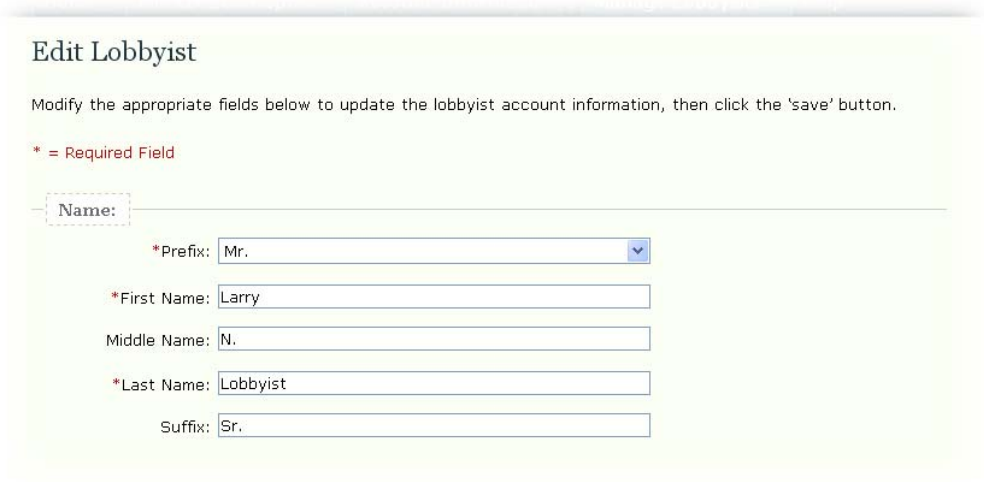
To verify the account of a previously registered lobbyist:

- Click on the **Manage Lobbyists** tab in the header:



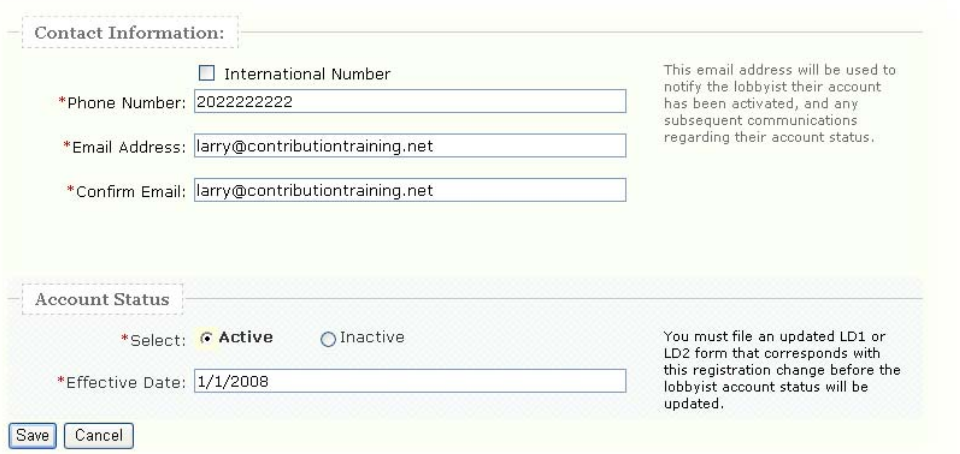
The **Manage Lobbyist** screen is displayed;

- Click on the name of the lobbyist that you want to verify:



The **Edit Lobbyist** screen is displayed;

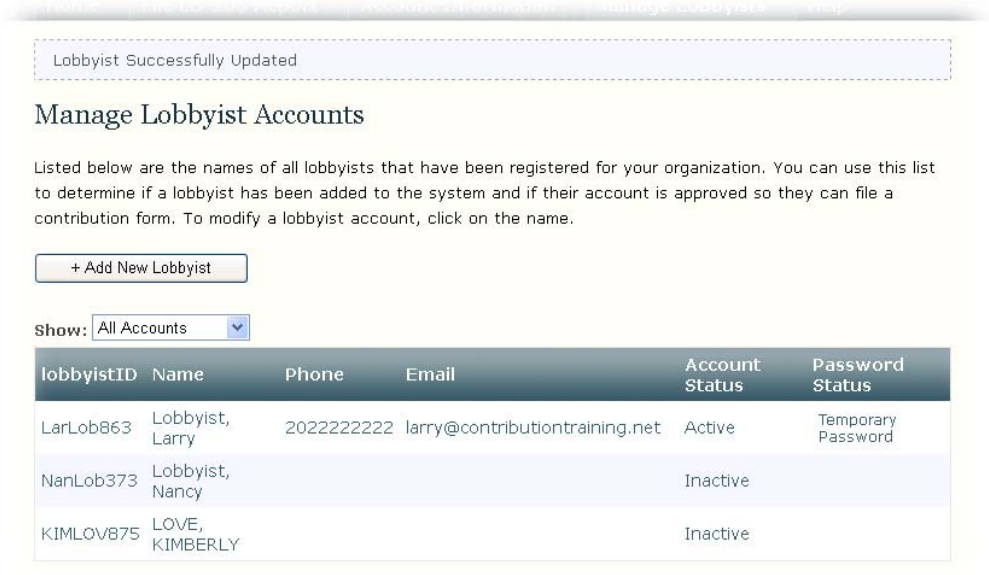
- Modify the name as needed, including adding a prefix and middle name to uniquely identify the individual;



- Enter a phone number and email address in the appropriate fields;

Note: It is critical that the email address is entered correctly as it is used for all system correspondence with the lobbyist. If the email address is not entered correctly, the account cannot be activated.

- Select Active in the **Account Status** section, and click the **Save** button.



The **Manage Lobbyists** screen is displayed with a message that the account has been updated. The Account and Password status have also been updated to reflect that the account is now active but the lobbyist has not yet activated their account. When the password is set, the password status will be changed to active.

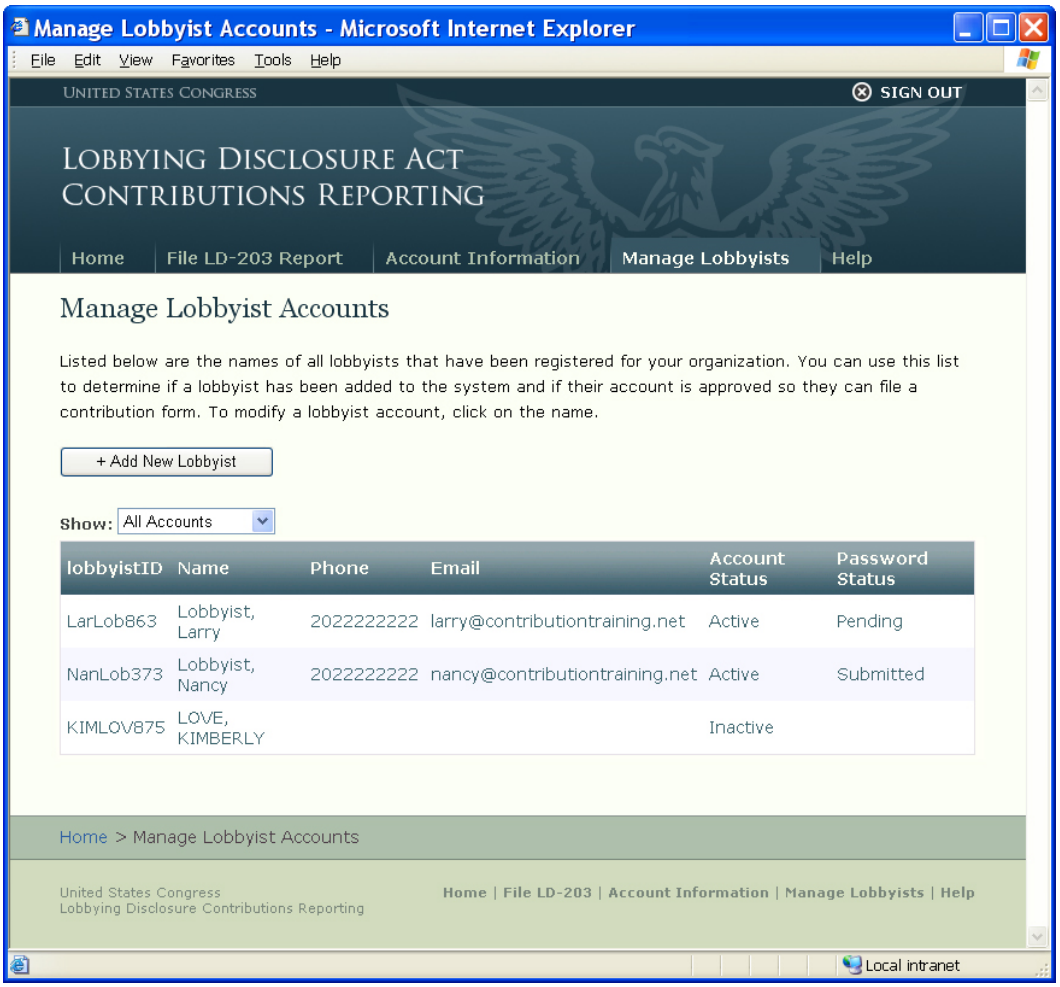
See Reviewing Lobbyist Accounts for a list of status definitions

Correcting Email Addresses

If you have entered the email address for a lobbyist account incorrectly, it must be reset so that the activation email is sent to correct email address.

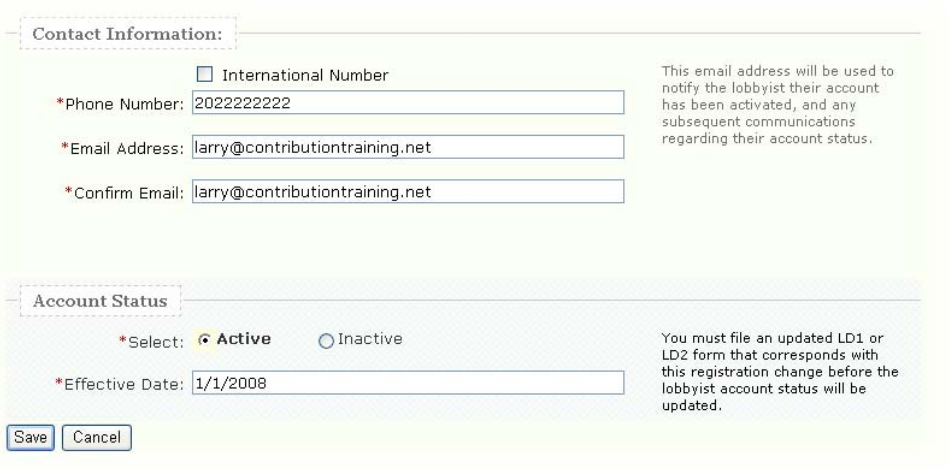
To reset the password:

- Click on the **Manage Lobbyists** tab in the header:



The **Manage Lobbyist** screen is displayed:

- Click on the lobbyist account that you want to modify:



The **Edit Lobbyist** screen is displayed;

- Modify the email address and click the **Save** button;
- Contact the Legislative Resource Center and request that the password is reset for that account:

  When the password is reset, the system will send a new activation email to the lobbyist so that the individual can activate their account.

Adding New Lobbyist Accounts

To create an account for a newly registered lobbyist, you must add the name to the system.

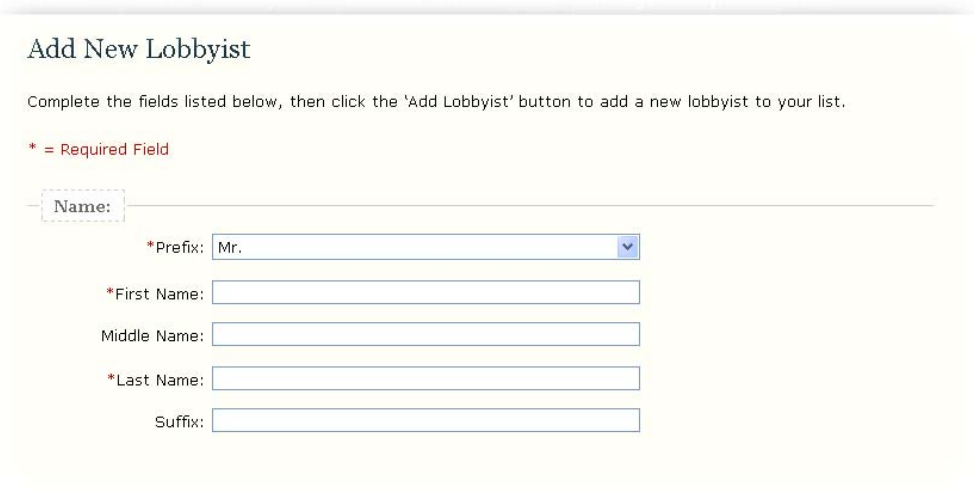
Note: You must add the new lobbyist to the system within the same filing period that you registered the individual to lobby on the Registration or Reporting form.

To add a new lobbyist account:

- Click on the **Manage Lobbyists** tab in the header:

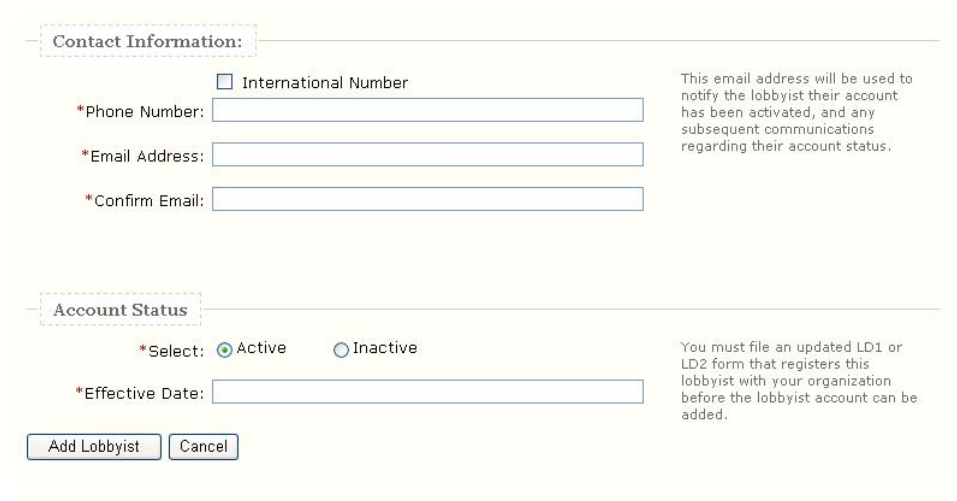
The Manage Lobbyist screen is displayed;

- Click on the **Add New Lobbyist** button:

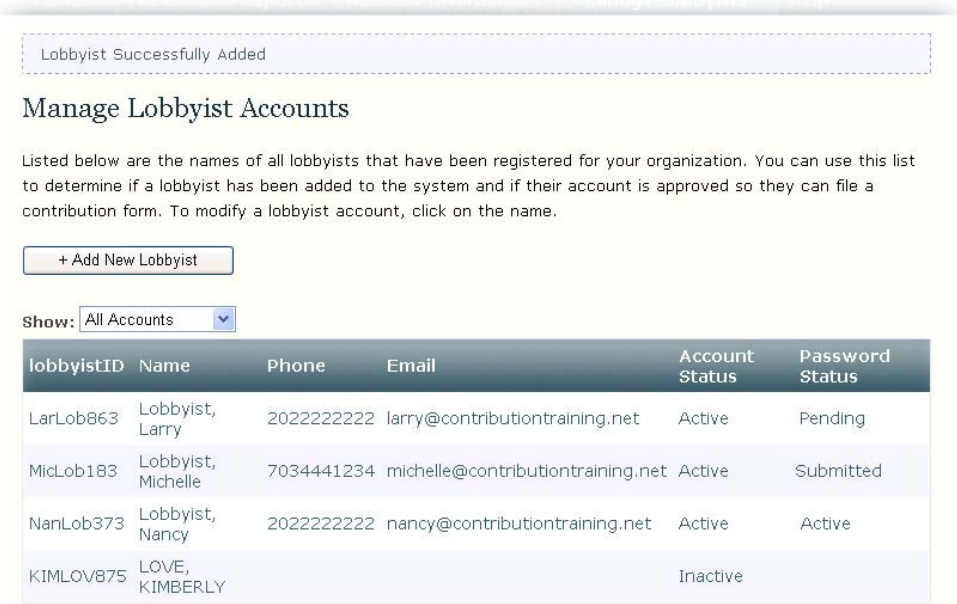


The **Add New Lobbyist** screen is displayed;

- Enter the new lobbyist name in the appropriate fields;



- Enter the new lobbyist phone number and email address in the appropriate fields;
- Enter the date the lobbyist began actively lobbying in the **Effective Date** field and click the **Add Lobbyist** button:



The **Manage Lobbyist** screen is displayed with a message that the new account has been added. The password status on the new account is submitted and an activation email has been sent to the new lobbyist.

When the lobbyist activates the account the status is updated to pending and the House Legislative Resource Center will review it. Please remember that the account will not be approved until the name is listed as a new lobbyist on a Registration or Reporting form.

See Reviewing Lobbyist Accounts for a list of status definitions

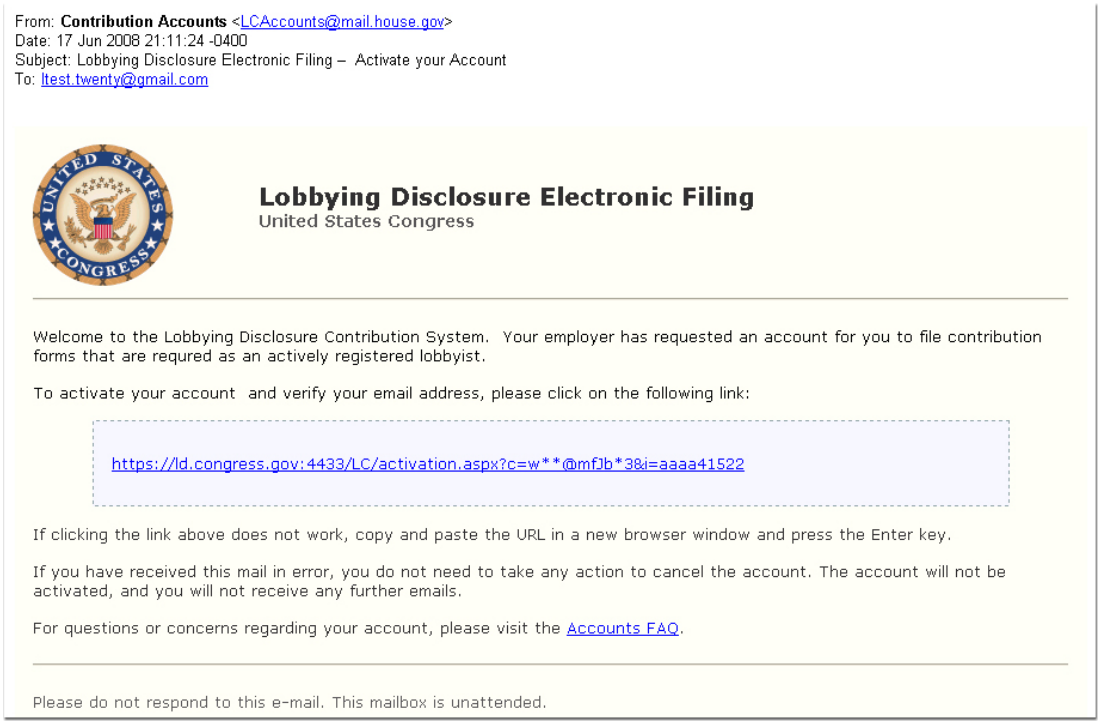
Activating Lobbyist Accounts

Lobbyist accounts are unique to each actively registered lobbyist. You will continue to use the same ID and password as long as you are actively lobbying, even if you change your employer. Before you can log in you must activate your account and create a password.

When your account is verified by your employer, the system will automatically send you an activation email so that you can create your password and set three security questions. The system will also send you an activation email if you have locked your account and need to reset the password.

To activate your account or reset your password:

- Locate your activate email:



From: **Contribution Accounts** <LCAccounts@mail.house.gov>
Date: 17 Jun 2008 21:11:24 -0400
Subject: Lobbying Disclosure Electronic Filing – Activate your Account
To: ltest.twenty@gmail.com

Lobbying Disclosure Electronic Filing
United States Congress

Welcome to the Lobbying Disclosure Contribution System. Your employer has requested an account for you to file contribution forms that are requred as an actively registered lobbyist.

To activate your account and verify your email address, please click on the following link:

https://ld.congress.gov:4433/LC/activation.aspx?c=w**@mfJb*3&i=aaaa41522

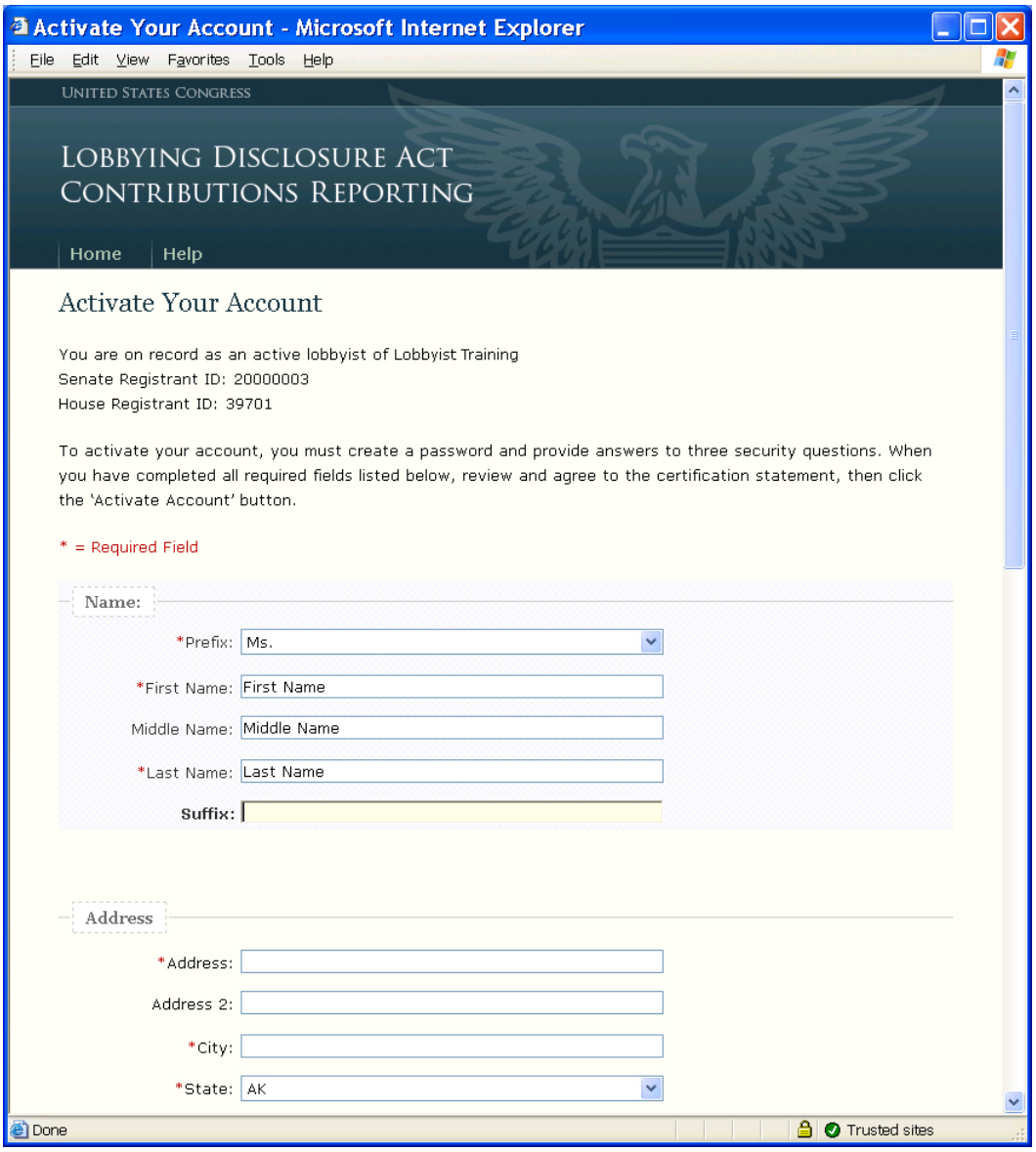
If clicking the link above does not work, copy and paste the URL in a new browser window and press the Enter key.

If you have received this mail in error, you do not need to take any action to cancel the account. The account will not be activated, and you will not receive any further emails.

For questions or concerns regarding your account, please visit the Accounts FAQ.

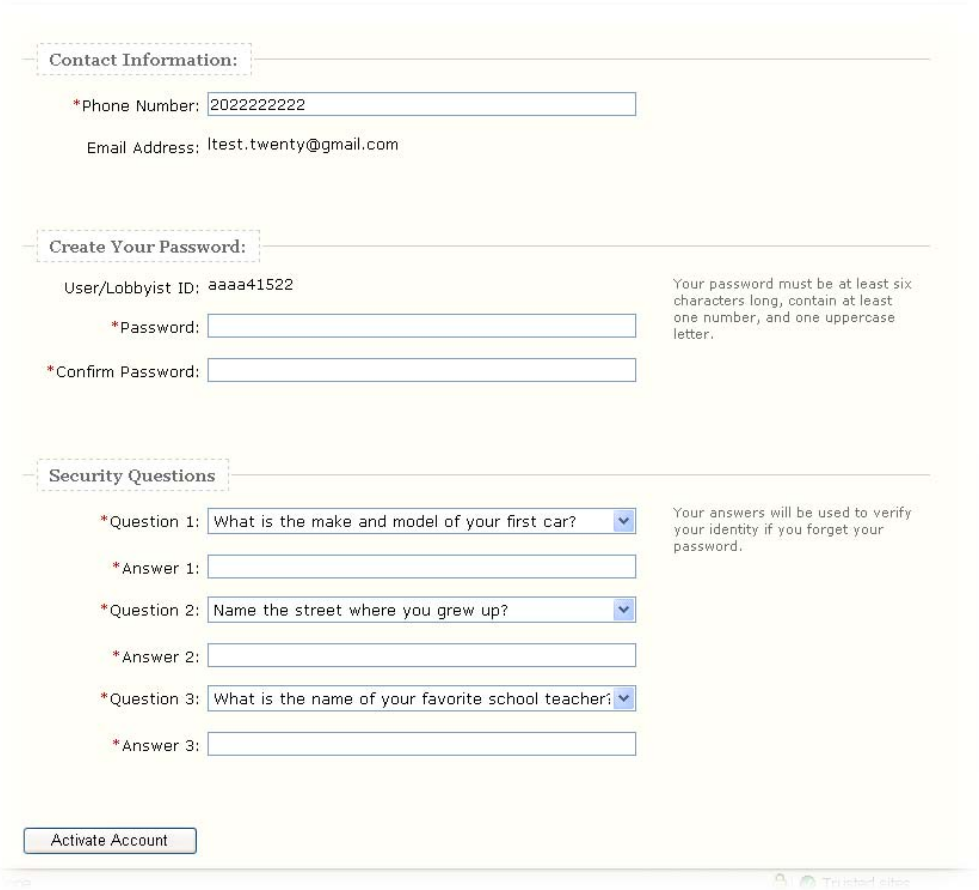
Please do not respond to this e-mail. This mailbox is unattended.

- Click on the link in the body of the email or follow the instructions to copy and paste the email into a browser window:



An activation page is displayed;

- Modify the name fields as needed and complete the required fields for a mailing address;

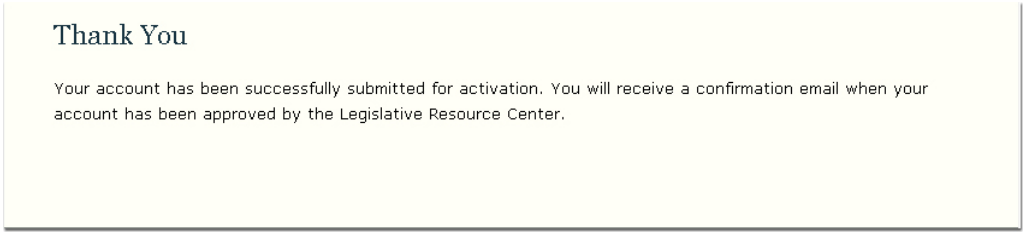


- Update the phone number if needed;
- Type a password in the **Password** field and enter it a second time in the **Confirm Password** field;

NOTE: Passwords are case sensitive and must contain at least 6 characters, at least one number, and at least one upper case character.

- Select a question from the **Question 1** pull down menu in the **Security Question** section and type an answer in the **Answer 1** field;
- Repeat the previous step for security question 2 and security question 3;

- Click the **Activate Account** button;



A confirmation will be displayed in your browser;

When your account has been activated a second email will be sent to you confirming your ID and password. Please save this email for your records and delete the original activation email. Once your account has been activated the link to activate the account is no longer valid and cannot be used again.

Updating Account Information

Accounts on the contribution system are unique to each registrant and lobbyist and is used to provide access to the contribution form as well as to maintain some of the information that is used to pre-populate the form. The Account Information page on the Contribution Reporting System provides a way for each user to update information related to their account:

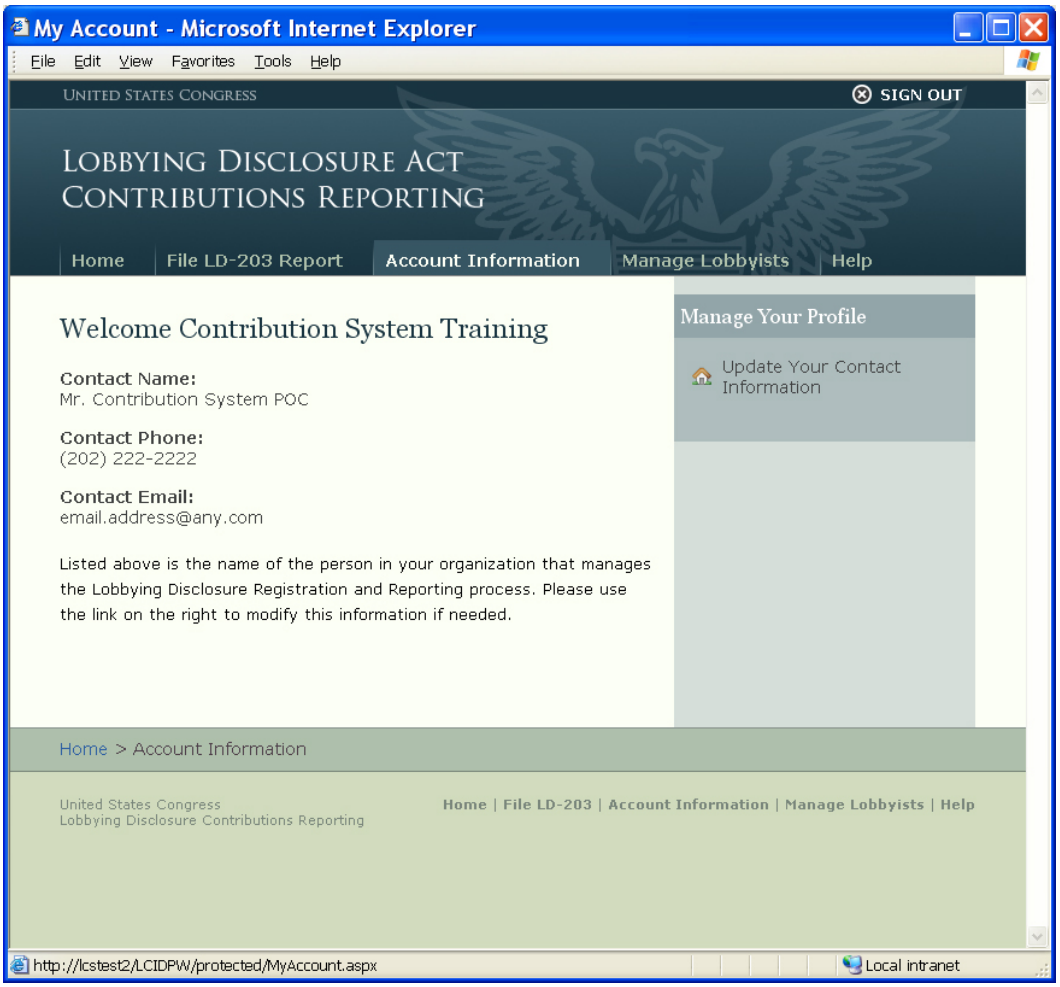
- Update the contact information that is pre-populated on the form for registrants and lobbyists;
- Change the lobbyist password;
- Modify the security questions and answers so lobbyists can retrieve the password automatically;
- Notify the House and Senate that a lobbyist is changing employers.

See Tutorials for registrant and lobbyist account management demonstrations

Updating Registrant Contact Information

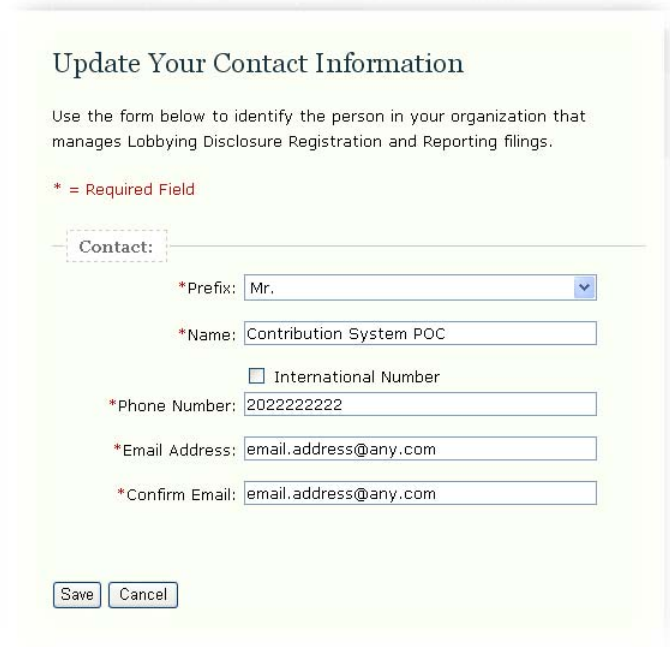
To update the contact information for an account:

- Click on the **Account Information** tab in the header:



The **Account Information** screen is displayed;

- Click on the link **Update Your Contact Information** in the **Manage Your Profile** section;



Note: The name that is entered for the contact is the name that is used to sign the form.

- Modify the information displayed as appropriate;

If any of the fields are not complete or have an invalid entry, the system will display a message when your cursor leaves that field. When you have corrected the entry, the message disappears;

- Click the **Save** button when your changes are complete;

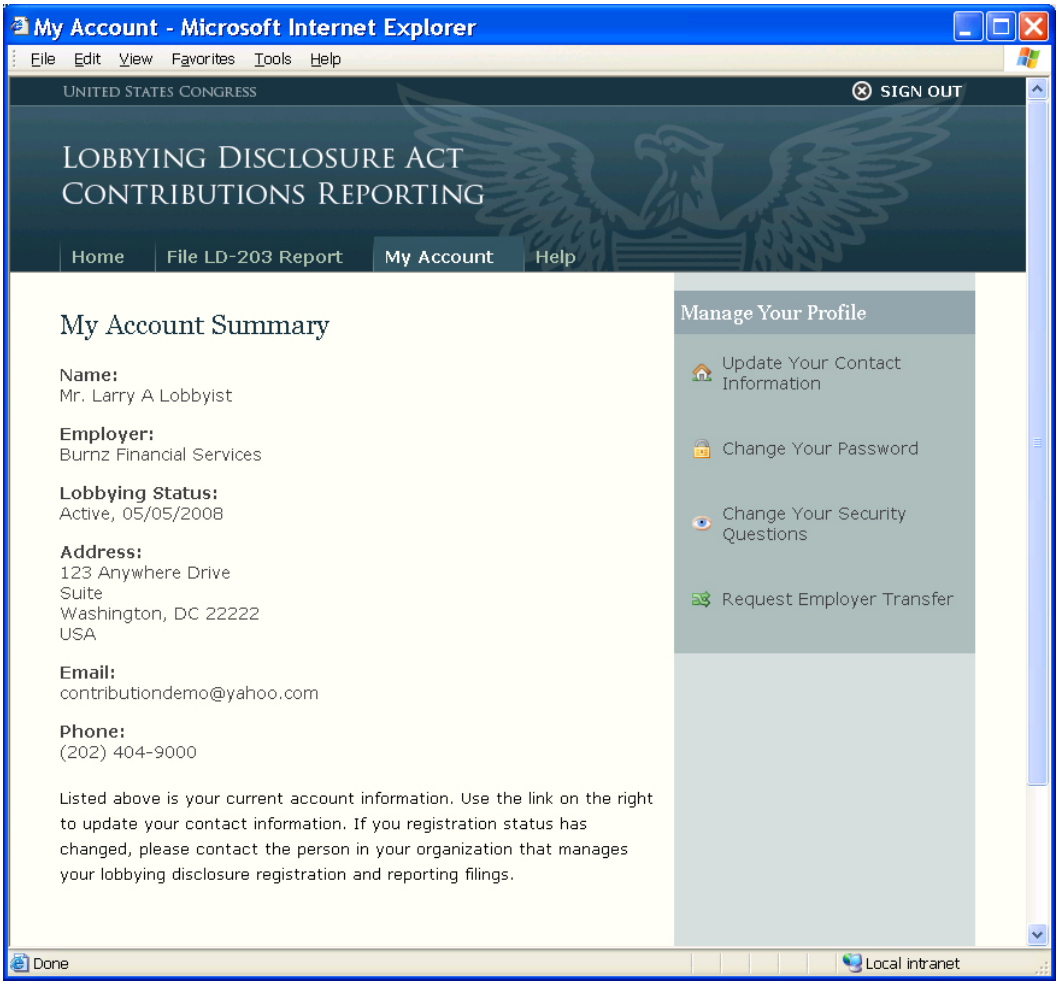
You will be returned to the profile page and a message will be displayed at the top of the page that your update was successful.

Updating Lobbyist Account Information

Lobbyists have the ability to update their contact information, change their password and security questions, or notify the House and Senate that they are changing employers using the **My Account** screen.

To update the contact information for an account:

- Click on the **My Account** tab in the header:

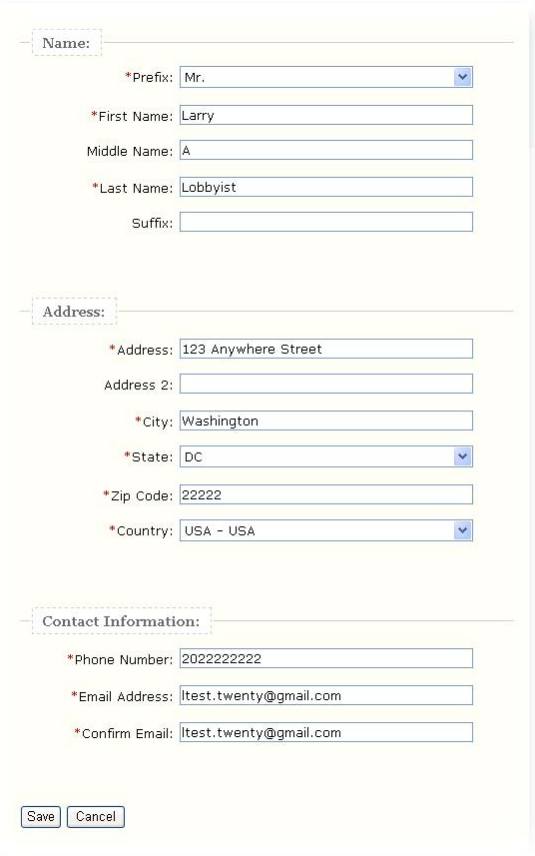


The **Account Information** screen is displayed with links to modify your account information.

Updating Lobbyist Contact Information

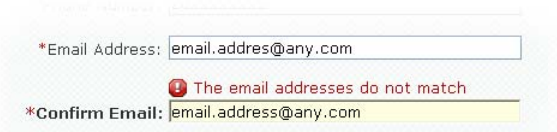
To update the contact information for an account:

- Click on the link **Update Your Contact Information** in the **Manage Your Profile** section;



The **Update Your Contact Information** screen is displayed;

- Modify the information displayed as appropriate;



If any of the fields are not complete or have an invalid entry, the system will display a message when your cursor leaves that field. When you have corrected the entry, the message disappears;

- Click the **Save** button when your changes are complete;

You will be returned to the profile page and a message will be displayed at the top of the page that your update was successful.

Updating Passwords

Registrants do not have the ability to change their password, as it is maintained by the Senate. Lobbyists may change their password at any time.

To change a lobbyist password:

- Click on the link **Change Your Password** in the **Manage Your Profile** section;

The **Change Your Password** screen is displayed;

- Enter your current password and the new password you want to use;
- Enter the new password again and click the **Save** button:

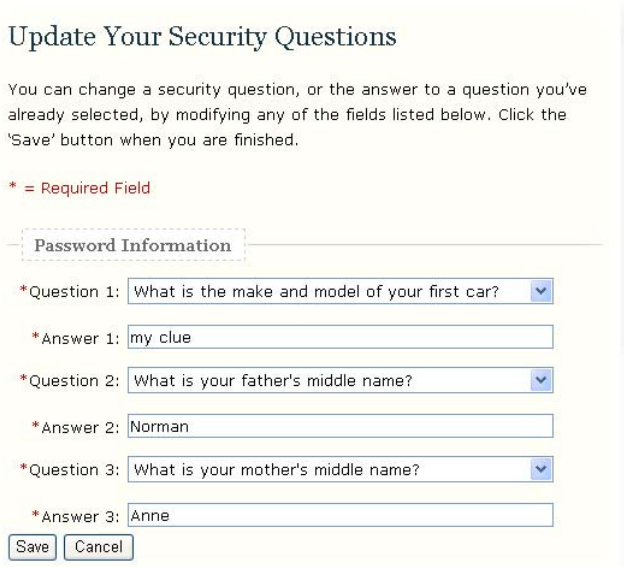
The **Account Summary** page is displayed with a message that your password has been updated successfully.

Updating Security Questions

Security questions are used by lobbyists to locate their password if they forget it. Lobbyists may change the questions and answers for this feature at any time.

To change a lobbyist password:

- Click on the link **Change Your Security Questions** in the **Manage Your Profile** section;



The **Update Your Security Questions** screen is displayed;

- Select new questions from the pull down list for any of the three questions;
- Enter new answers for any of the three questions and click the **Save** button:

The **Account Summary** page is displayed with a message that your security questions have been updated successfully.

Requesting Employer Transfers

Lobbyists may notify the House and Senate that they will be working for a new registrant at any time. The request will be reviewed by the Legislative Resource Center and approved when both the old and new employer have filed the appropriate forms to add and remove the name from their respective list of employed lobbyists.

Requesting a transfer will not affect the account status for a lobbyist. The lobbyist may continue to sign in to the system and file contribution forms even if the request is pending. When the request is approved by the Legislative Resource Center the name will appear on the list of lobbyists for the new employer and pre-populated information on the contribution form will be updated.

To request a transfer to a new employer:

- Click on the link **Request Employer Transfer** in the **Manage Your Profile** section:

The Request Employer Transfer screen is displayed;

- Enter at least three characters of the new employer name in the **Employer Name** field and click the **Search** button:

A list of all registrant names that match your search criteria will be displayed;

- Click on the name of the registrant that you will be transferring to:

The Transfer Summary screen is displayed with both your old and new employer information;

- Click the **Submit Transfer Request** button to complete the request;

*Note: If you did not select the correct registrant, you can click the **Select a different employer** link to select a new employer*

A confirmation message will be displayed.

When your transfer has been reviewed by the Legislative Resource Center an email will be sent to the email address on file for the lobbyist account with the results of their review.

Working with the Contribution Form

Each time you sign in to the system, you establish an editing session for the contribution form. While you are signed in, you will have the ability to create a new filing, open a saved filing and append it, or retrieve a previously filed form and amend it.

Form Features:

- You must be logged into the system to access the Contribution form;
- The system saves the form for each filing period and it can be retrieved and edited at any time;
- The Senate, House, and Lobbyist ID's, as well as the contact information you entered for your account, will be pre-populated on the form;
- Required fields and form entries will be checked as you work with the form. If a field is invalid, you will be prompted to correct it before continuing;
- Registrants can populate data from a database using an import tool;
- A printable version of your form can be generated at any time while you work with the form;
- The signing and submission process has been combined into a single step based on the User ID and password you used to sign into the system;
- A printable confirmation message will be displayed each time your file your form.

Note: The import tool is designed for populating large forms by IT professionals familiar with using XML files only. If you are not familiar with XML, it is recommended that you use the Wizard available on the Contribution form.

See Tutorials for a demonstration of working with the form

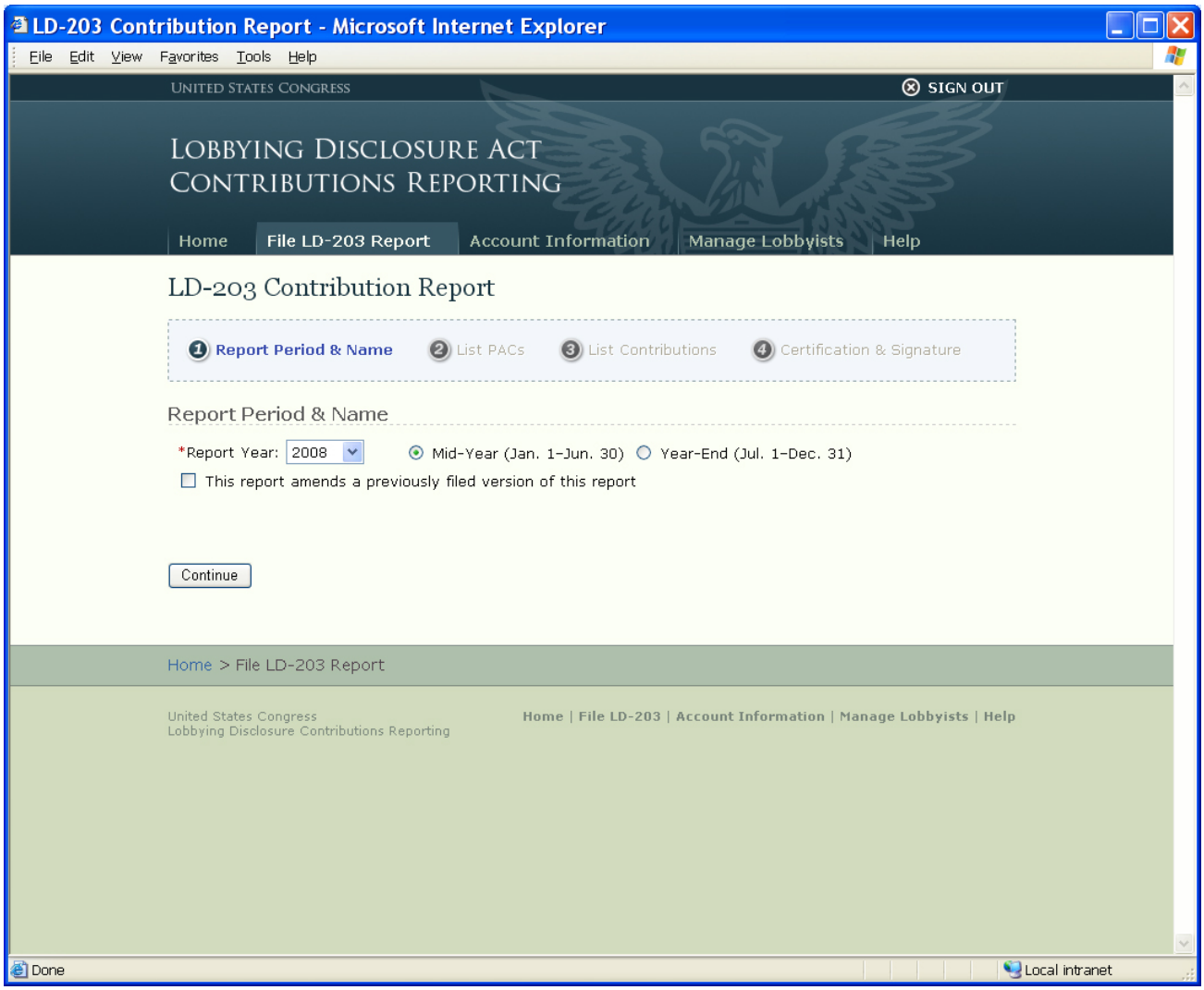
Creating a New Form

The contribution form is interactive and the system will build a unique filing for each reporting period in three easy steps. A contribution wizard has also been created to assist you in entering your individual contributions for each report. Once a filing has been created, it will be saved on the system so that you can append it as many times as needed until the report is ready to be submitted.

See Line by Line Instructions for content information that should be entered on a report

To create a new report:

- Click on the **File LD-203 Report** tab in the header bar;



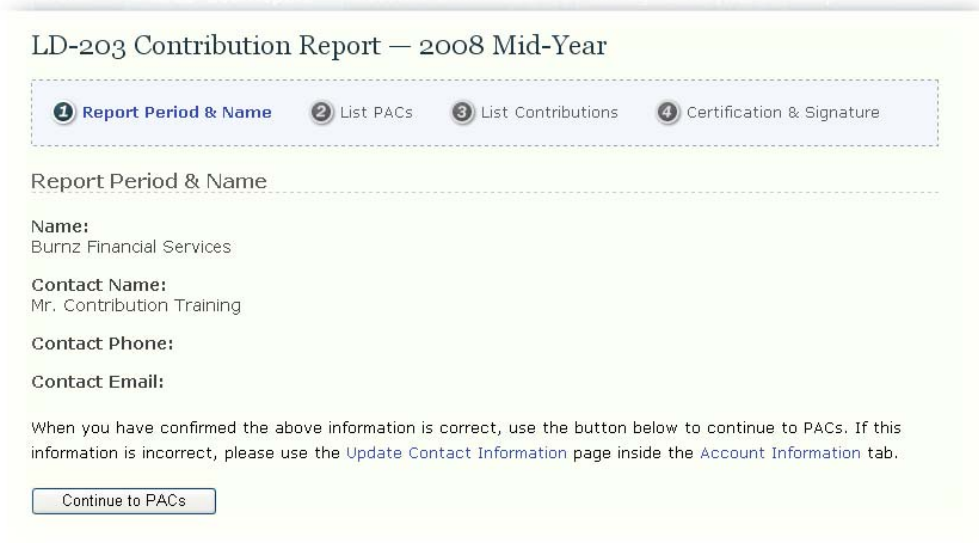
The LD-203 Contribution Report form is displayed;

- Select a year and report type from the **Report Year** and **Filing Period** fields, then click the **Continue** button:

The **Create New Report** screen is displayed;

Note: The Import Contribution Data option is not available for individual lobbyists and will not be displayed if you are signed in as a lobbyist. Go to the Importing XML Data section if you wish to use this feature to create a new report.

- Click the **Create New Report** button;



Registration information that was previously entered for your account will be displayed;

Note: This information cannot be changed on the contribution form. Registrant names can only be updated by filing a registration or reporting form with the corrected name. Filer contact information must be updated from the My Account or Account Information tab.

- Click the **Continue to PAC's** button;

The form is saved on the server and the **List PACs** screen is displayed. You can use this screen to list the name of each political action committee that you established or controlled during a filing period;

- If you do not have any political action committee names to report, click the **Continue to Contributions** button;
- If you do have a political action committee name to report, enter it in the **PAC Name** field and click the **Add Pac** button:

The name will be displayed below the field. If you have more than one name to report, you can repeat these steps until all of the names have been listed;

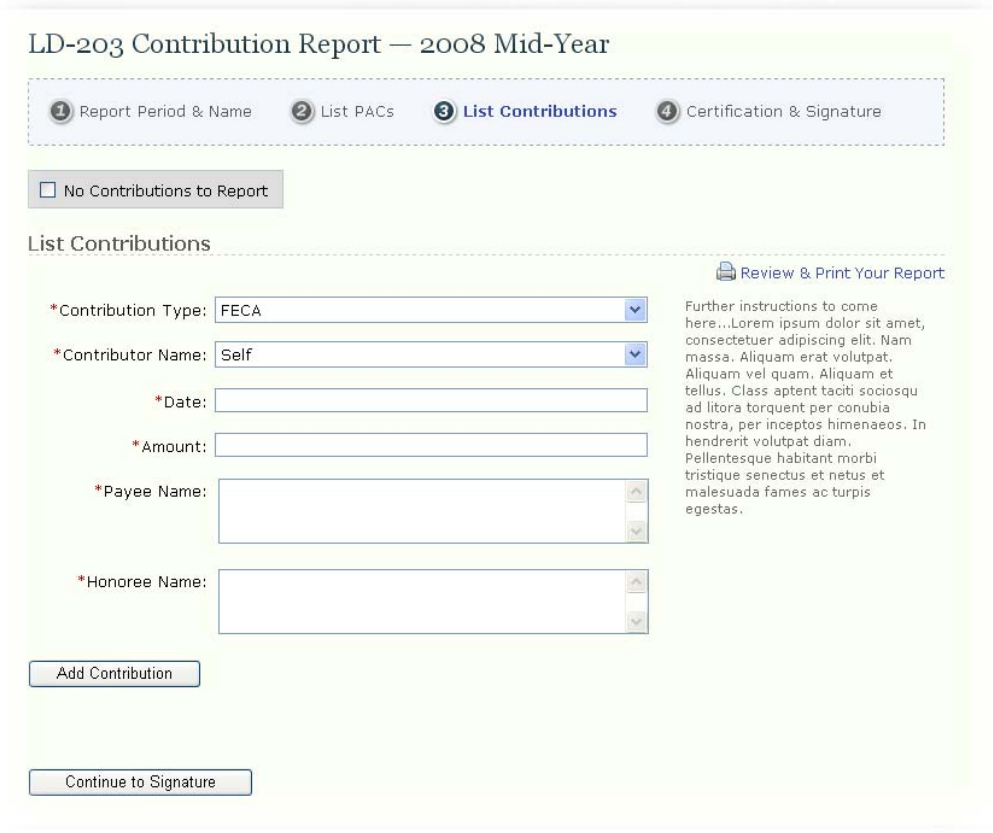
- If you need to edit any of the PAC names you have entered:
  - Click the **Delete** button next to any name you want to remove from this list;
  - Click the **Edit** button next to the name you want to change:

The name becomes editable;

  - Click the **Update** button when your changes are complete:

Note: You should review all of the PAC names you have entered before continuing. Each name on the PAC list will be available as a contributor on the next screen and cannot be edited if you select it as a contributor.

- When you have confirmed that the information is correct, click the **Continue to Contributions** button:

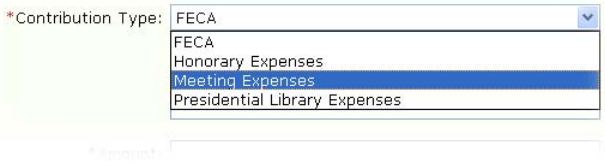


The **List Contributions** screen is displayed with a wizard to help you enter your contributions:

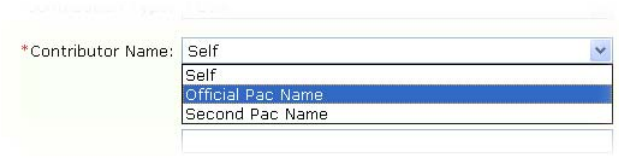
- If you did not have any contributions for the reporting period, click the **No Contributions to report** checkbox. At this point, you do not need to list any contributions and you can sign and file your report;
- If you do have contributions to report, you can enter them on the form using the wizard;

Note: The No Contributions checkbox is hidden if you've added at least one contribution to the form. All contributions must be deleted to display it again.

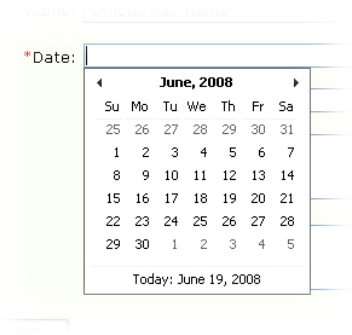
- To enter a contribution:
  - Select a contribution type from the pull down menu;



- Select a contributor name from the pull down menu;



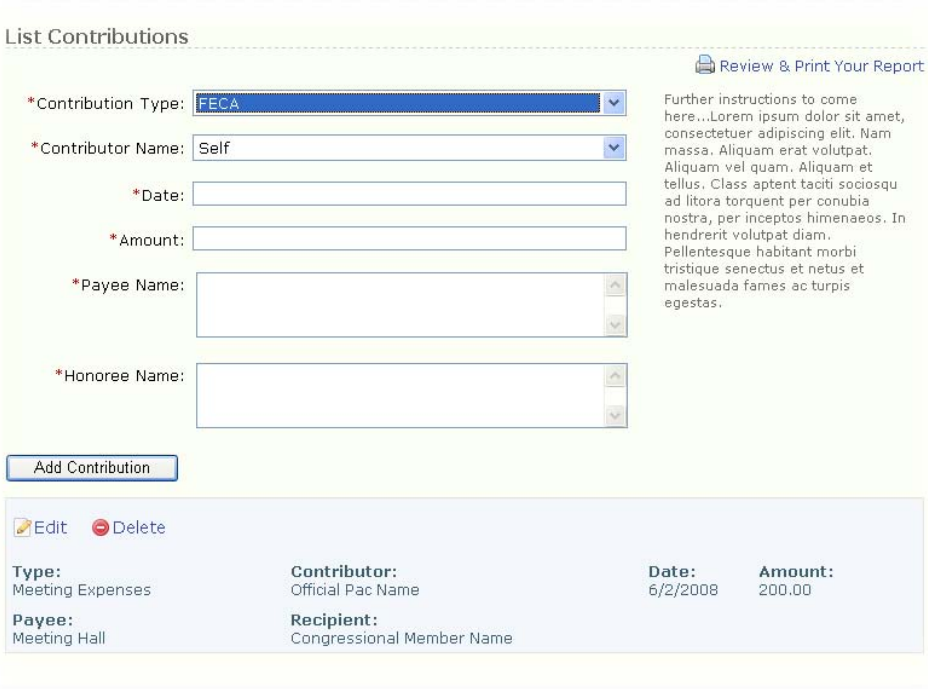
- Select the date of the contribution using a calendar or by entering the date;



- Enter the contribution amount, payee name, honoree name, and click the **Add Contribution** button:

If the contribution entry is not complete, a message will be displayed above the field;

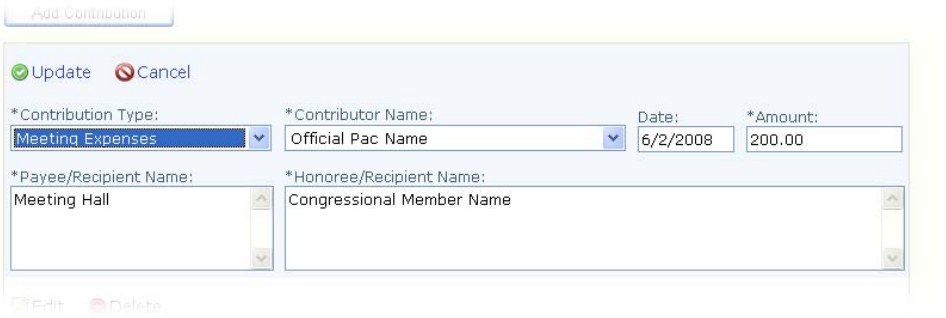
- Correct the entry and click the **Add Contribution** button again;



The new contribution entry will be displayed below the wizard. You may repeat these steps as many times as needed to insert all of your contributions.

Note: At this point it is important to remember that the system saves the form for you. If you need to enter contributions for a specific filing period over several days or months, you can sign in to the system again, retrieve the saved form and append the filing as needed until it is ready to be filed.

- If you need to edit any of the contributions you have entered:
  - Click the **Delete** button next to the entry you want to remove;
  - Click the **Edit** button next to the contribution you want to change:



All of the fields for that contribution become editable;

  - Click the **Update** button to apply your changes;
- When all of the contributions are complete and you are ready to file your form, click the **Continue to Signature** button to file it.

Importing XML Data

You may import contribution data using an XML file that you've created from any source, such as a database or Excel spreadsheet. The import tool is designed for populating large forms by IT professionals familiar with using XML files only. If you are not familiar with XML, it is recommended that you use the Wizard available on the Contribution form.

The following files are available in the zip file ld203FormImport.zip that will help you use a spreadsheet to create an import file for the contribution form:

- LD3Export.xls (Blank Excel spreadsheet with schema mapping);
- LD3ExportSAMPLE.xls (Excel spreadsheet with sample data);
- LD3ExportXMLSample.xml (sample import file)
- LDC.xsd (LD203 Schema).

Note: The LD203Import file works with Microsoft Office 2003 or later

See Line by Line Instructions for content information that should be entered on a report

Using a Database to Create an XML Import File

The LD-203 schema is included in the Form Import zip file. Please consult the IT professional in your organization about using this schema to create XML import files from your database.

Using Microsoft Excel to Create an XML Import File

To create a spreadsheet:

- Save the LDC.xsd and LD3Export.xls files to a local or network drive;
- Open LD3Export.xls:
- Enter all PAC names to be referenced for contributions in Column A, titled **name**;

Note: The PAC name should be entered only once regardless of the number of times it is referenced in contributions (columns C – H).

Column B is blank by design and should contain no data.

- Enter each of your contributions in column C – H using the following criteria:
  - Enter one of the following contribution types in column C, titled **type**:
    - FECA
    - Honorary Expenses
    - Meeting Expenses
    - Presidential Library Expenses
  - Enter Self or the appropriate PAC name in column D, titled **contributorName**. PAC names entered in column D must also be listed once in column A or the import tool will fail to validate it;

Note: Contributor types and names are case sensitive. You must enter Self with a capital S, and all types and Pac names exactly as they are listed or the import will fail.

- Enter the appropriate Payee name(s) in column E, titled **payeeName**. Separate multiple Payees with a comma. (80 character limit);
- Enter the appropriate Honoree(s) in column F, titled **recipientName**. Separate multiple Honorees with a comma. (200 character limit);
- Enter the dollar amount for the contribution in column G, titled **amount. Do not enter a leading $** You do not need to enter the decimal point for whole dollar amounts but you may do so to indicate cents;
- Enter the contribution date in MM/DD/YYYY format. (include slashes /) in column H, titled **date;**
- Repeat these steps to enter each of your contributions.

To export the data in your spreadsheet as XML:

- Open your saved Microsoft Excel file completed in the above steps;
- On the toolbar, click on the **Data** menu;
- Click on **XML**, and select **Export**:

  A "save as" window titled Export XML will appear.
- Navigate to the directory location of your choice (remember where you put it, you'll need this xml file for use with the import tool);
- Enter a file name and click **Export**:

  The XML file has been exported to the directory selected. The spreadsheet remains intact and should be closed and saved after the export.

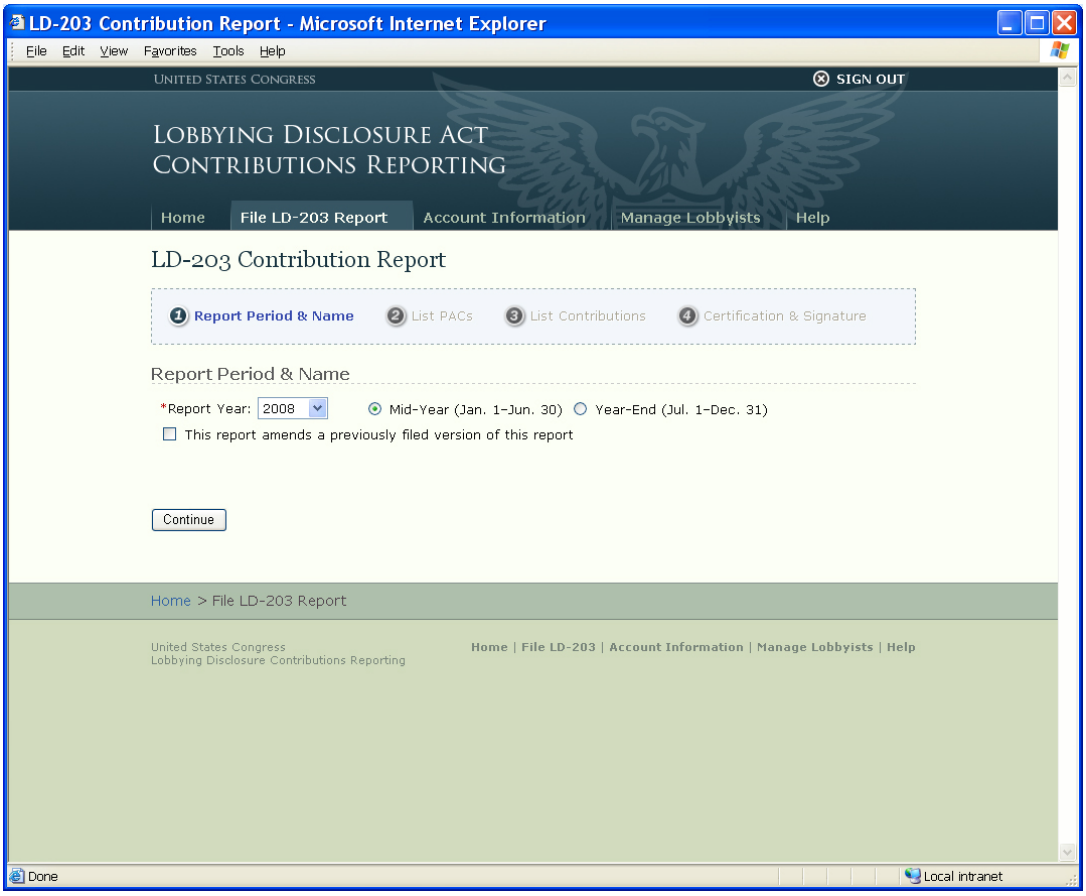
Data Entry Tips:

- In column A, a tab after each entry will move the cursor to the next row in column A. Column A and columns C – H are not linked in the spreadsheet;
- In columns C – H tabbing moves the cursor along the row. In column H a tab puts the cursor in the next row, column C;
- The columns may be re-sized as necessary;
- The spreadsheet may be saved at any point and re-opened for further data entry.

Importing XML files into the Contribution Form:

To import the XML file into the contribution form:

- Sign in to the system and click on the **File LD-203 Report** tab in the header bar;

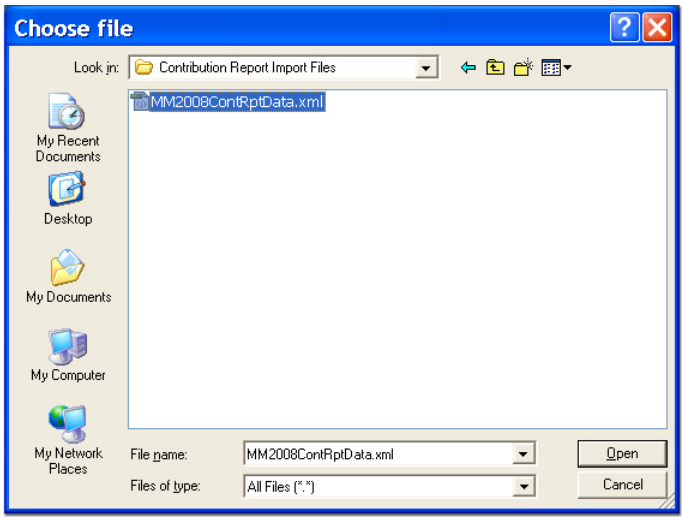


The LD-203 Contribution Report form is displayed;

- Select a year and report type from the **Report Year** and **Filing Period** fields, then click the **Continue** button:

The **Create New Report** screen is displayed;

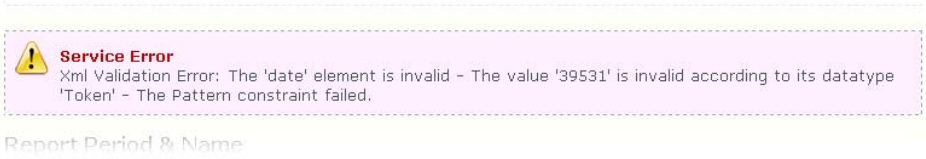
- Click the **Browse** button in the **Import Contributions Data** section:



Navigate to the folder where you stored the XML file you want to import;

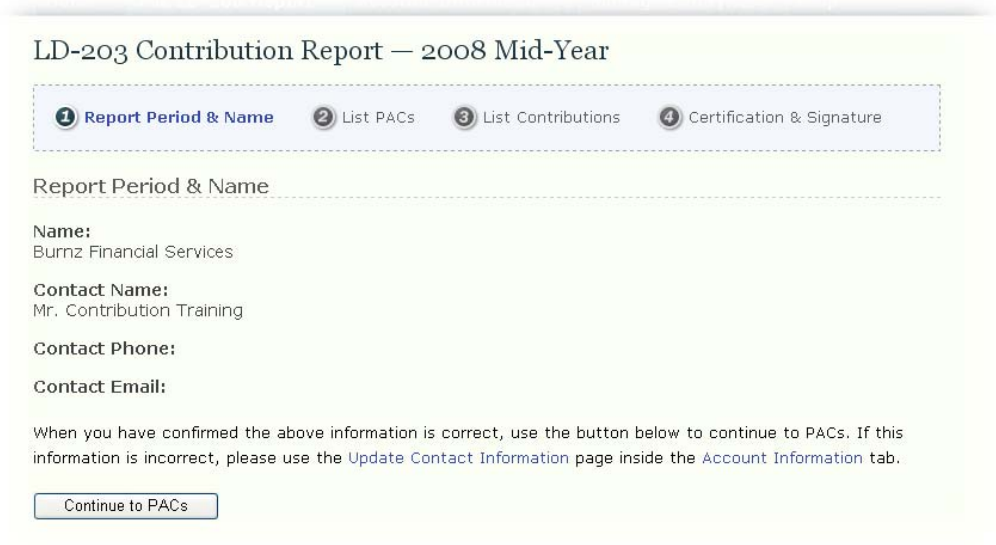
- Select the file you want to import and click the **Open** button;

- Click the **Upload XML** button. The XML file you are uploading will be validated;



If any entry does not pass validation, a message will be displayed;

- You must correct the data in your import file and upload it again;



- When the imported file is validated, registration information that was previously entered for your account will be displayed;

Note: This information cannot be changed on the contribution form. Registrant names can only be updated by filing a registration or reporting form with the corrected name. Filer contact information must be updated from the My Account or Account Information tab.

- Click the **Continue to PAC's** button and verify that all of your PAC names are listed;
- Click the **Continue to Contributions** button and verify all of your contributions are listed;
- When all of the contributions are complete and you are ready to file your form, click the **Continue to Signature** button to file it.

Note: You may edit your PAC name and contribution entries on the form if needed using the edit button for each entry.

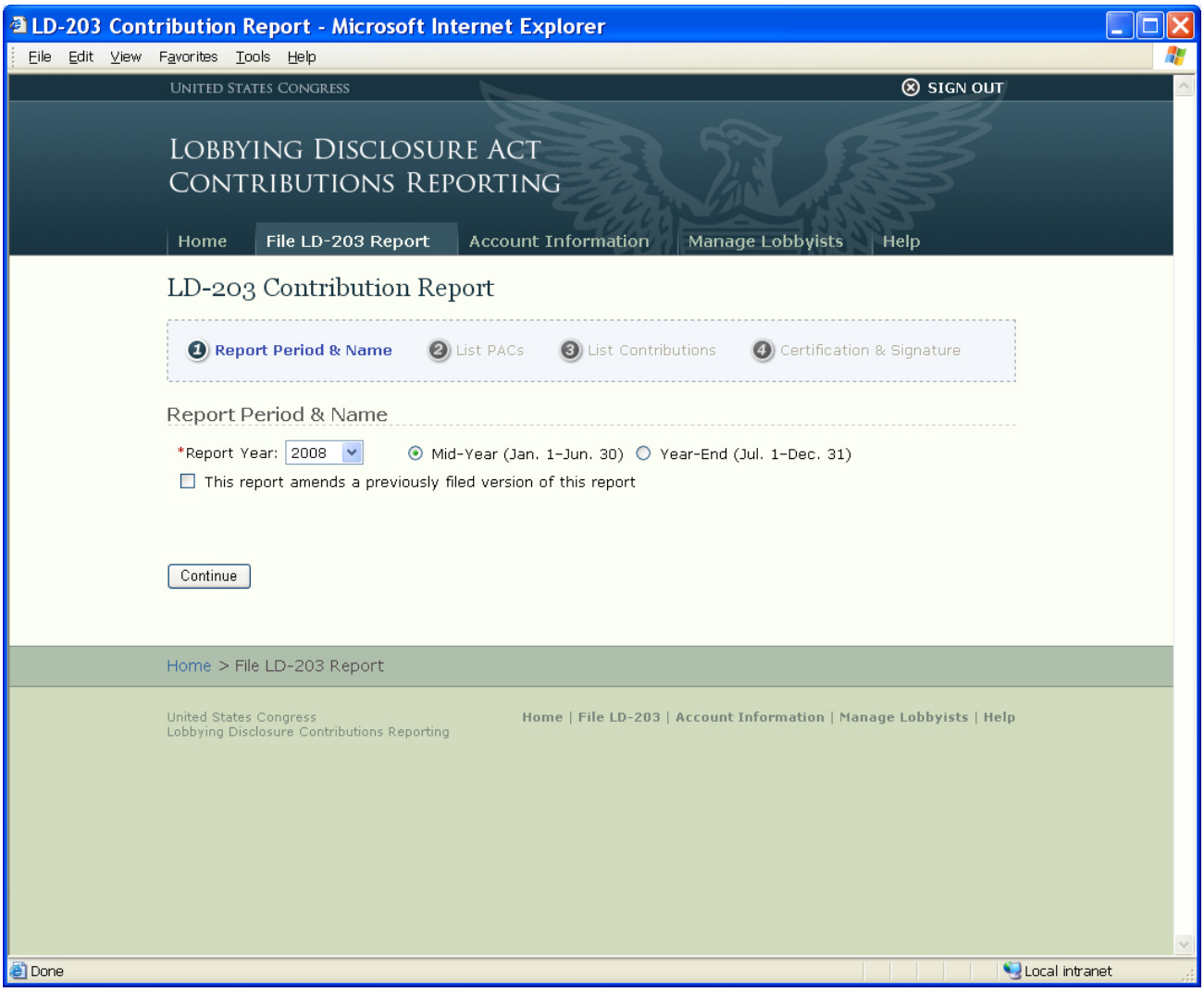
Using Saved Forms

Because the system saves the last version of your form for each filing period, you can edit a filing in multiple sessions until it is ready to be submitted or amend a previously filed form without recreating it.

See Line by Line Instructions for content information that should be entered on a report

To retrieve a saved form:

- Sign in to the system and click on the **File LD-203 Report** tab in the header bar;



The Report Period & Name screen is displayed;

- Select the report year and filing period for the form you want to modify, and then click the **Continue** button;

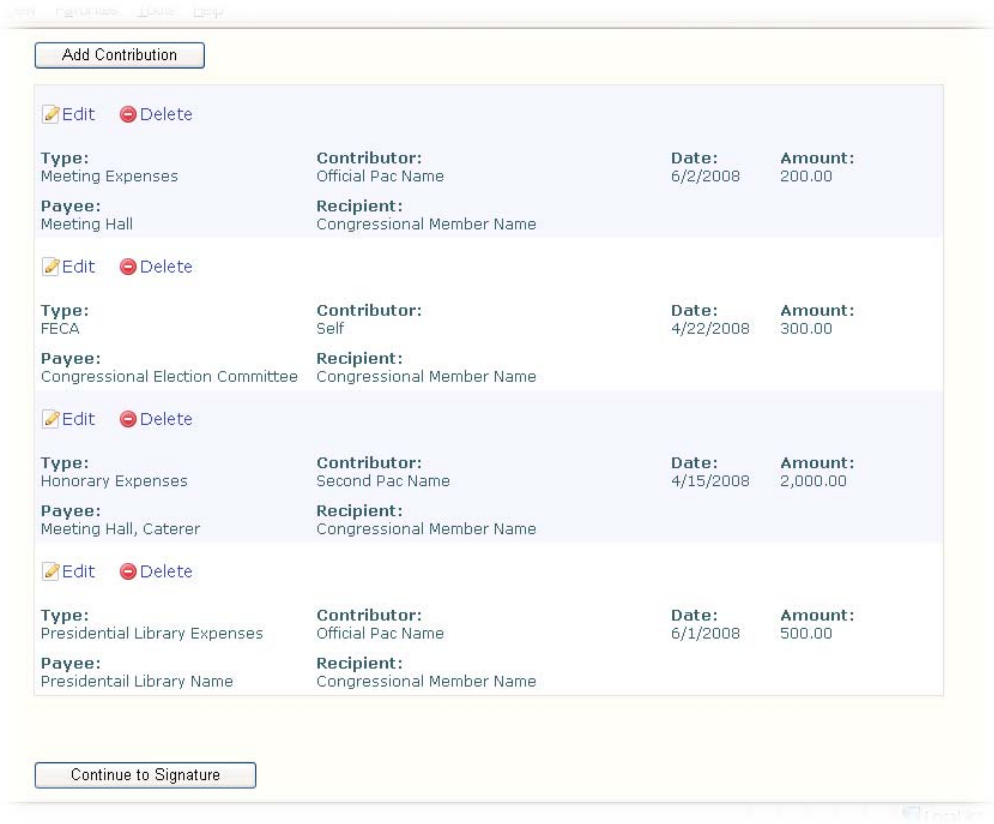
Note: If you want to amend a previously filed form, make sure you click the amendment button before going to the next step.

When the saved form has been located, a message will be displayed asking if you want to create a new report or load the saved report;

Note: If you use the import function when an existing report has already been saved on the server, the report will be overwritten and all previous entries will be lost.

- Click the **Load the Existing Report** button;

The saved form with all of its entries will be displayed;



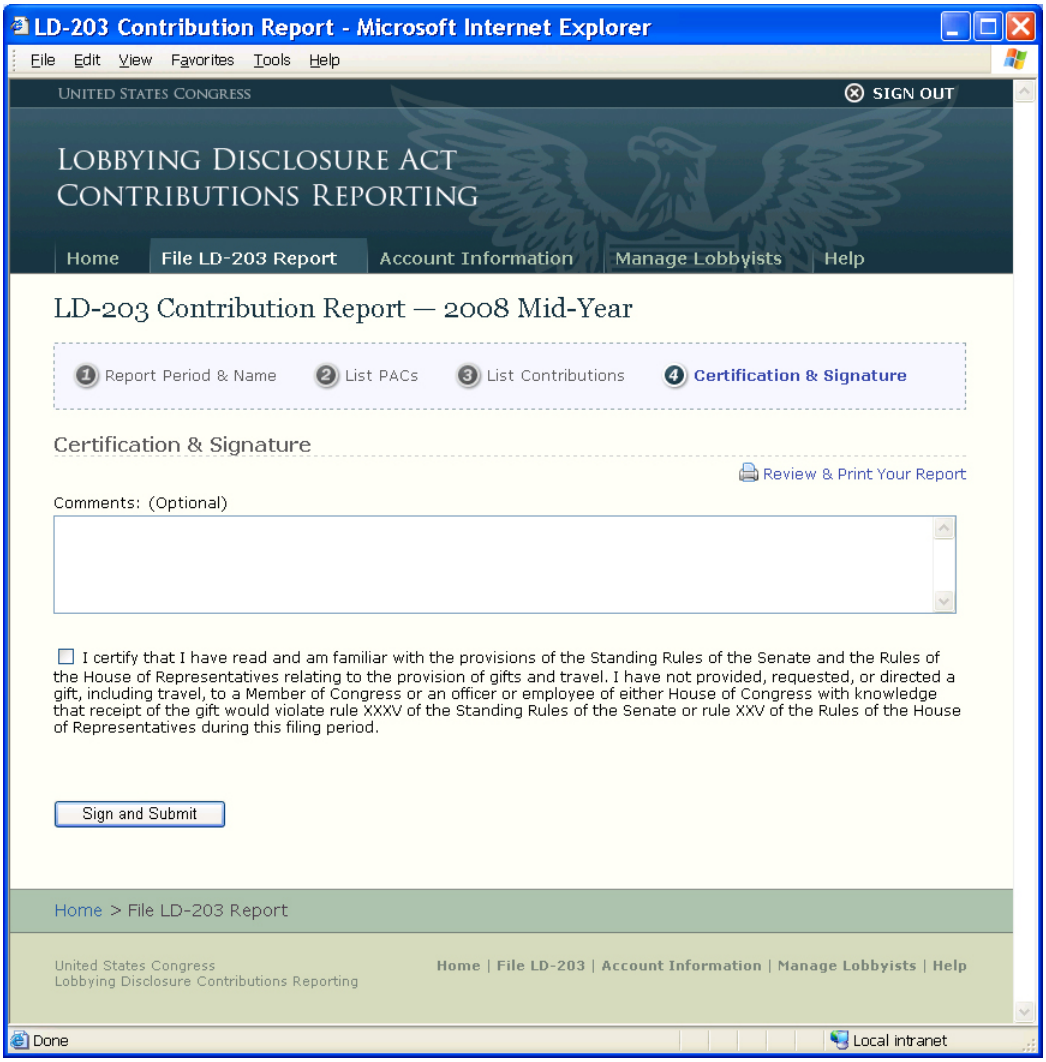
Edit the content as needed and the click the **Continue to Signature** button to file it.

Filing Your Form

When all of the entries on your form have been completed, you can certify you understand the gift and travel rules for the House and Senate and file it electronically.

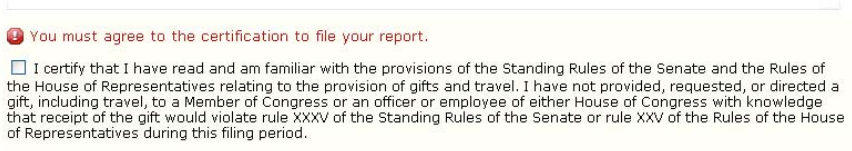
To electronically file your completed form:

- If your form is not already open, complete steps 1 – 3 to create and complete the form;
- Click the **Continue to Signature** button on step 3:



- If you have additional comments you would like to add, enter them in the **Comments** field:

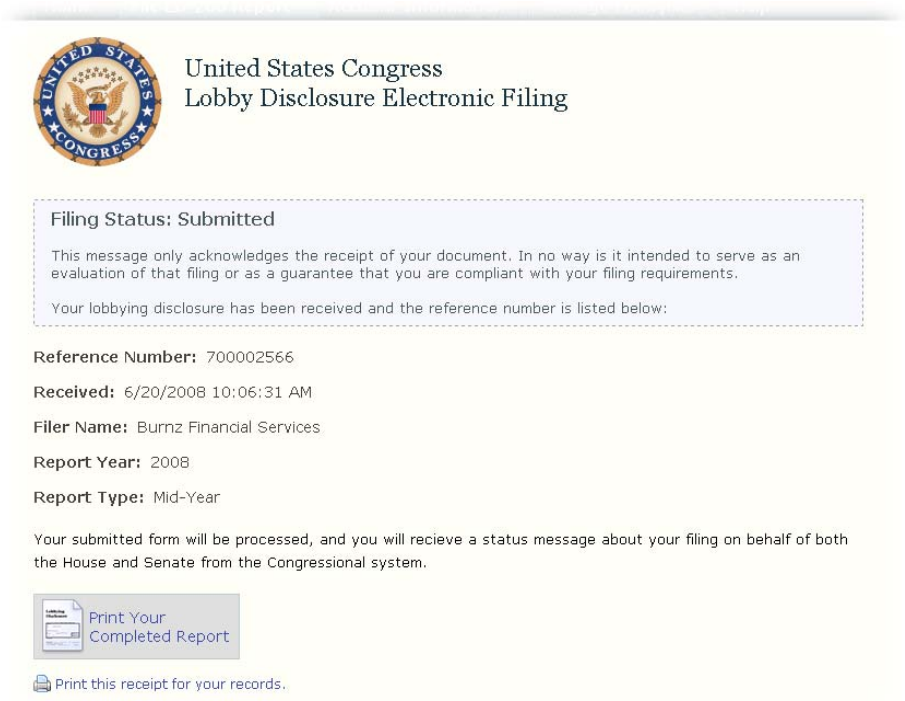
- Check the **Certification** checkbox that you understand the Standing Rules of the Senate and the Rules of the House on Gifts and Travel:



A message will be displayed if the certification box is not checked.

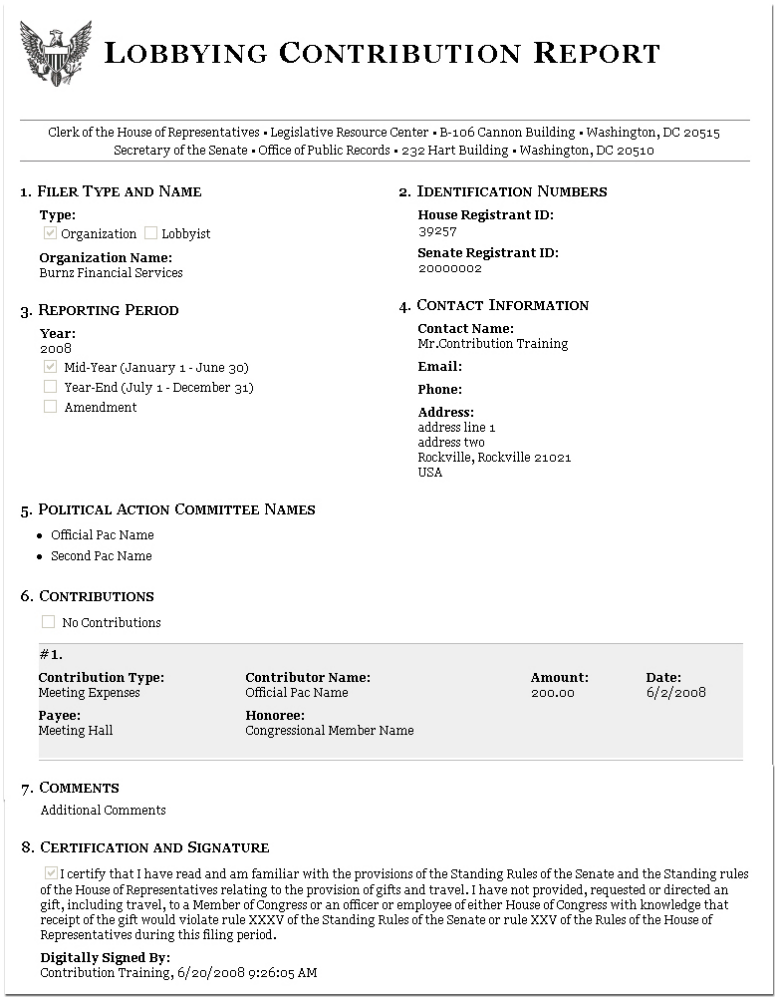
Note: Only the registrant or lobbyist listed on the form can check the certification portion of the form and file it.

- Click the **Sign and Submit** button:



The form will be signed using the contact information for your account and submitted. When the form has been received, a confirmation message will be displayed. This confirmation will contain a reference number, your name, and the report year and type that you submitted;

- If you wish to keep a printed copy of your filing confirmation, click the **Print this receipt for your records** link;
- If you wish to print a copy of the filing for your records, click the **Print Your Completed Report** link:



LOBBYING CONTRIBUTION REPORT

Clerk of the House of Representatives • Legislative Resource Center • B-106 Cannon Building • Washington, DC 20515
Secretary of the Senate • Office of Public Records • 232 Hart Building • Washington, DC 20510

1. FILER TYPE AND NAME

Type:
☑ Organization ☐ Lobbyist

Organization Name:
Burnz Financial Services

2. IDENTIFICATION NUMBERS

House Registrant ID:
39257

Senate Registrant ID:
20000002

3. REPORTING PERIOD

Year:
2008

☑ Mid-Year (January 1 - June 30)
☐ Year-End (July 1 - December 31)
☐ Amendment

4. CONTACT INFORMATION

Contact Name:
Mr.Contribution Training

Email:

Phone:

Address:
address line 1
address two
Rockville, Rockville 21021
USA

5. POLITICAL ACTION COMMITTEE NAMES

- Official Pac Name
- Second Pac Name

6. CONTRIBUTIONS

☐ No Contributions

#1.

Contribution Type:	Contributor Name:	Amount:	Date:
Meeting Expenses	Official Pac Name	200.00	6/2/2008
Payee:	**Honoree:**		
Meeting Hall	Congressional Member Name		

7. COMMENTS

Additional Comments

8. CERTIFICATION AND SIGNATURE

☑ I certify that I have read and am familiar with the provisions of the Standing Rules of the Senate and the Standing rules of the House of Representatives relating to the provision of gifts and travel. I have not provided, requested or directed an gift, including travel, to a Member of Congress or an officer or employee of either House of Congress with knowledge that receipt of the gift would violate rule XXXV of the Standing Rules of the Senate or rule XXV of the Rules of the House of Representatives during this filing period.

Digitally Signed By:
Contribution Training, 6/20/2008 9:26:05 AM

A printable version of your filed form is displayed in your browser. Use the print function in your browser to print the filed report for your records.

Note: The system uses the individual listed under contact information to sign registrant forms, lobbyist forms will be signed using the lobbyist name.

Tutorials

The online tutorials listed below are designed to play in most standard browsers using the following applications:

- Windows media player version 9 or greater;
- QuickTime version 7 or greater;
- Flash version 9 or greater;
- Real Media Player version 10 or greater;

Please click the appropriate links below to view a training topic for the Contribution Reporting System.

Topic	**Windows Medial Player**	**Apple QuickTime**	**Real Media**
Introduction by the Clerk & Secretary	Introduction.asx	Introduction.mov	Introduction.ram
Understanding Electronic Filing	Overview.asx	Overview.mov	Overview.ram
Registrant Training	Registrant.asx	Registrant.mov	Registrant.ram
Lobbyist Training	Lobbyist.asx	Lobbyist.mov	Lobbyist.ram
Working with the Contribution Form	Forms.asx	Forms.mov	Forms.ram
Where to Get Help	Help.asx	Help.mov	Help.ram

Appendix

Line by line Instructions

You must be logged into the system to access the form and file it.

STEP 1. REPORT PERIOD & NAME: You must select the report year and period to create or append a report. If you are amending a previously filed report, you must select the report year and period, then check the amendment box.

Click "Continue" to review the registration information that will be pre-populated on your form.

STEP 2. LIST PACS: Your registration and activation information will be displayed. This screen is use to list the name of each political action committee ("PAC") that you established or controlled. Enter the PAC name and click "Add PAC." You may add up to ten PACs. If may also skip this screen if do not have any PACs to report.

Click "Continue to Contributions" when you are finished with the PAC listing for your filing.

STEP 3. LIST CONTRIBUTIONS: If you do not have any contributions to report, click on the "No Contributions to Report" box,

If you do have contributions to report, use the Contribution wizard to insert each contribution you need to report:

- Select FECA, Honorary Expenses, Meeting Expenses, or Presidential Library Expenses from the drop down list:

Note: FECA contributions are campaign contributions to federal officeholders, leadership PACs and political party committees. Honorary Expenses is an expansive category designed to capture many required disclosures, such as the cost of an honoring event, a payment to an entity named for or in recognition of a covered legislative official, to an entity established, financed, maintained or controlled by a covered official, and contribution to a presidential inaugural committee.

- Select the contributor (self or PAC(s)) from the drop down list;
- Select the date of the contribution using the calendar tool or typing the date in mm/dd/yyyy format;
- Enter the amount of the contribution;
- Enter the payee name. Payee names may be the campaign committee name for the covered official (such as "Citizens for Senator X"), or the vendor (such as "AnyState University," or "Hotel Splendide");

- Enter the honoree name. Honoree name is the Member of Congress (such as “Senator Theresa Terrific”) or “Representative Grant Goodguy”);
- Repeat these steps to enter each contribution.

Click “Continue to Signature” to certify and file your form.

STEP 4. CERTIFICATION: Each registrant and lobbyist must check the box to certify that they have read and are familiar with the rules of the U.S. Senate and the U.S. House of Representatives relating to the provision of gifts and travel; and have not provided, requested, or directed a gift, including travel, to a Member, officer or employee of either body that would violate the rules of the body.

If you have additional comments on your report that you want to make to clarify an entry, please use the comments box.

Click “Review & Print Your Report” to view a printable version of your filing. When you are sure that you have included all of your contributions, click on the “Sign and Submit” to file your form with the Senate and the House. A filing confirmation will be displayed in your browser when your form has been submitted. A confirmation email will be sent to the email address on record for the filers account when your form has been processed.

See Understanding Electronic Filing for more information on processing messages

Troubleshooting Guide

The topics listed below provide solutions to commonly reported problems with the Lobbying Disclosure Contribution Reporting System. Please contact the Legislative Resource Center if the problem you are experiencing is not listed in these areas.

Viewing the Training DVD on a Computer

The training DVD that was mailed to each active registrant is designed to be viewed on a television using a DVD player. If you have a computer with a DVD drive you may view each training topic provided your computer has current drivers installed to view a DVD.

If you receive a message that your computer cannot display the video, please review any messages that may be displayed or consult your IT professional to update the drivers. Commonly reported problems playing the DVD on a computer are:

Application	Solution
Real Player 11	Update the driver for Intervideo WinDVD 4.0 DXVA to install the latest codex drivers
Windows Media Player	Upgrade the player to version 11 to install the latest codex drivers

Accessing the System

Access to the system is provided using an ID and password. If the sign in screen does not display several factors may be causing the problem:

- The sign in screen is displayed by clicking on the **LD-203 Contribution** link on the Lobbying Disclosure website. If you have blocked popups, the sign in screen may not display. Click here to access the system directly: https://ld.congress.gov:4433/LC/;

- Restricted web sites: Some users are restricted to accessing web sites that are listed as a trusted site only. Adding "LD.CONGRESS.GOV" to the list of trusted sites on your browser may allow you to access the web site;
- Network restrictions. If you receive any of the following messages you are being blocked by your network:
  - 502 proxy error. The specified Secure Sockets Layer (SSL) port is not allowed. ISA Server is not configured to allow SSL requests from this port;
  - Access Denied;
  - Page Cannot Be Displayed;
  - HTTP:404 Page not found

  Some registrants have firewall restrictions from within their network that do not allow users to access non-standard ports for a website. You will need to discuss this with your IT department for a solution. Please contact LRC to discuss the firewall configuration settings that need to adjusted to allow access to the web site

Registrants must use their Senate ID and password to sign into the system. Lobbyists must create a password and security questions to sign into the system. If you can't sign in, several options are available to assist you:

- If the sign in screen is displayed, but you can't sign in because of a wrong ID or password, please see the Locating Your ID Number or Locating Your Password topic to obtain the correct ID or password;
- If you are a lobbyist and the system says your ID or email address can't be found, please contact the person in your organization that manages your registration and reporting process. You must be registered as a lobbyist and your employer must verify your account before you are sent an activation email;
- If the employer verified the lobbyist account, but the lobbyist did not receive an activation email:
  - You must verify that you have entered the email address correctly for the lobbyist and that email from lcaccounts@mail.house.gov is not being sent to the lobbyist's junk mail folder;
  - Contact the House Legislative Resource Center at (202) 226-5200 about resending the activation email.
- If you inadvertently deleted an activation email, please contact the House Legislative Resource Center at (202) 226-5200 about resending the activation email.

Importing XML Data

The import tool has been designed for use by IT professionals that are proficient with XML. If you are using the import spreadsheet there are several things that you must consider:

- If you have less than 100 contributions to report, it is better to use the online form. The spreadsheet requires redundant data entry that is not required if you use the form;
- If you are not proficient with XML, it may take you longer to troubleshoot import problems than it will take to enter the contributions on the form;
- If you still wish to use the spreadsheet to import your PAC names and contributions, you may receive one of the following errors if you did not enter your contributions correctly:

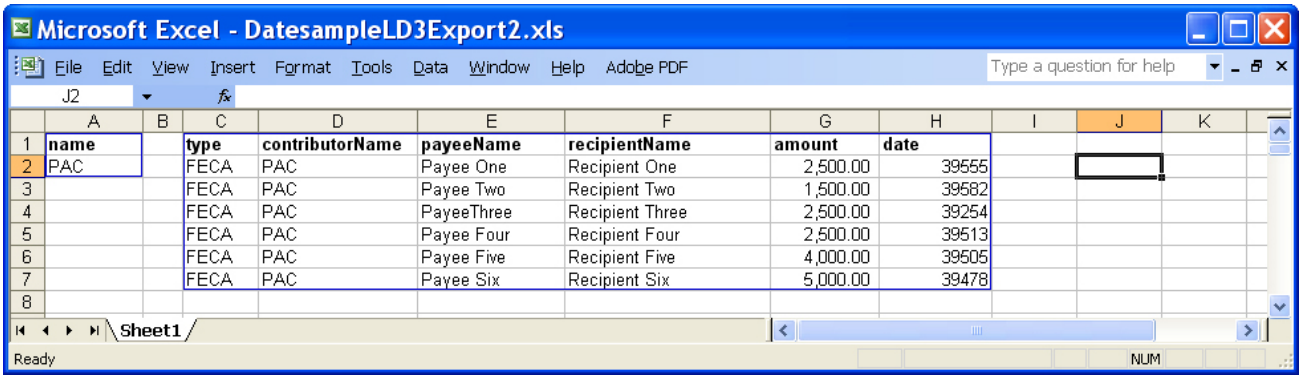
Service Error	Resolution
Xml Validation Error: The 'date' element is invalid - The value '39584' is invalid according to its datatype 'Token' - The Pattern constraint failed.	If you are copying and pasting the data from another source, the date fields will not be exported correctly unless they are formatted as text.
Xml Validation Error: The 'amount' element is invalid - The value '' is invalid according to its datatype 'http://www.w3.org/2001/XMLSchema:decimal' - The string '' is not a valid Decimal value.	The import tool will not accept files that have blank contribution elements. Check the spreadsheet and adjust the entries so that contributions are listed sequentially with no blank lines in between them.
Some of your contributors names aren't found in the provided PAC Names list.	The import tool is case sensitive. If you have a typo in the contributor field, the import will fail.
This Import Contains empty PACS. Please adjust your XML file and try again.	The import tool will not accept files that have blank PAC elements. Check the spreadsheet and remove any blank PAC entries.

Please see the topics below for additional information on how to correct the entries in your spreadsheet.

Correcting Date Fields

To correct date fields before exporting to XML:

- Open your completed Excel template;

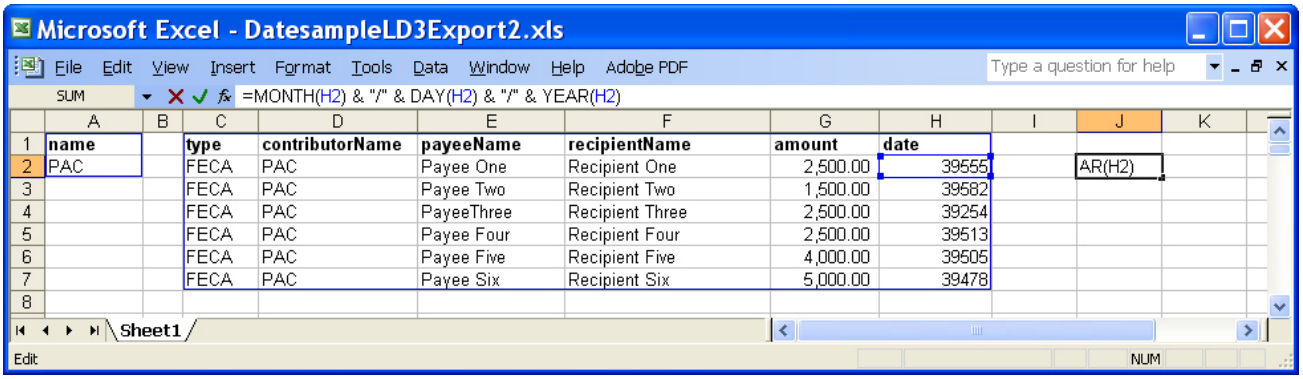


	A	B	C	D	E	F	G	H	I	J	K
1	name		type	contributorName	payeeName	recipientName	amount	date			
2	PAC		FECA	PAC	Payee One	Recipient One	2,500.00	39555			
3			FECA	PAC	Payee Two	Recipient Two	1,500.00	39582			
4			FECA	PAC	PayeeThree	Recipient Three	2,500.00	39254			
5			FECA	PAC	Payee Four	Recipient Four	2,500.00	39513			
6			FECA	PAC	Payee Five	Recipient Five	4,000.00	39505			
7			FECA	PAC	Payee Six	Recipient Six	5,000.00	39478			
8											

- Click on cell J2;

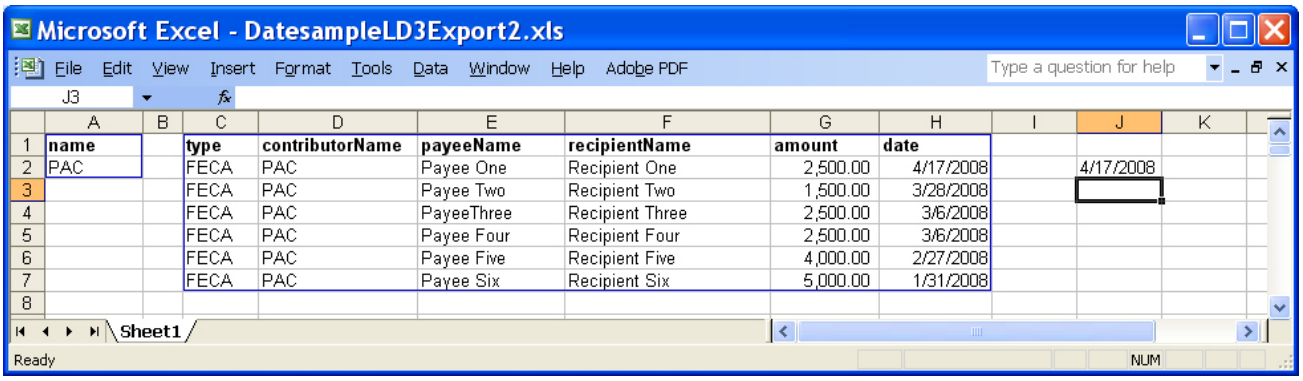
  Note: You can use any column that is not directly adjacent to H (meaning not I)

- Copy and paste **=MONTH(H2) & "/" & DAY(H2) & "/" & YEAR(H2)** into the formula bar:



	A	B	C	D	E	F	G	H	I	J	K
1	name		type	contributorName	payeeName	recipientName	amount	date			
2	PAC		FECA	PAC	Payee One	Recipient One	2,500.00	39555		AR(H2)	
3			FECA	PAC	Payee Two	Recipient Two	1,500.00	39582			
4			FECA	PAC	PayeeThree	Recipient Three	2,500.00	39254			
5			FECA	PAC	Payee Four	Recipient Four	2,500.00	39513			
6			FECA	PAC	Payee Five	Recipient Five	4,000.00	39505			
7			FECA	PAC	Payee Six	Recipient Six	5,000.00	39478			
8											

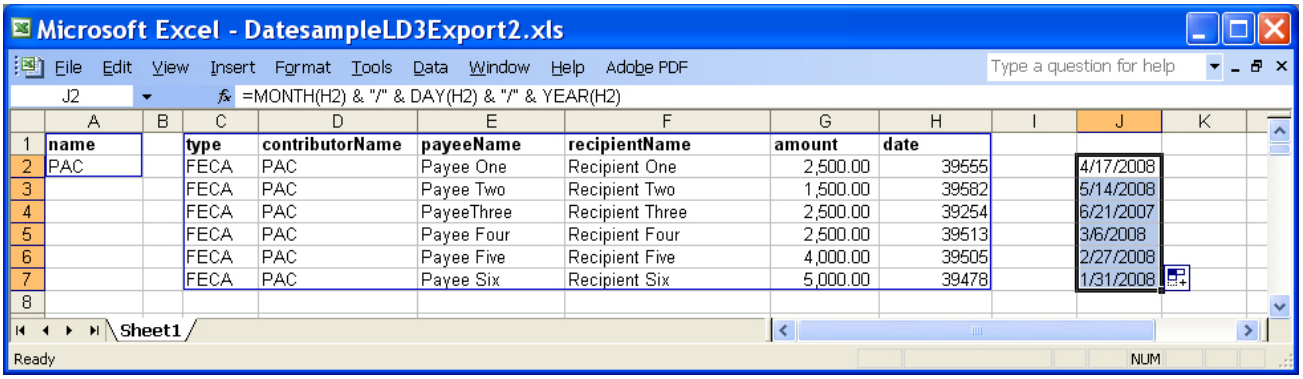
- Press enter:



	A	B	C	D	E	F	G	H	I	J	K
1	name		type	contributorName	payeeName	recipientName	amount	date			
2	PAC		FECA	PAC	Payee One	Recipient One	2,500.00	4/17/2008		4/17/2008	
3			FECA	PAC	Payee Two	Recipient Two	1,500.00	3/28/2008			
4			FECA	PAC	PayeeThree	Recipient Three	2,500.00	3/6/2008			
5			FECA	PAC	Payee Four	Recipient Four	2,500.00	3/6/2008			
6			FECA	PAC	Payee Five	Recipient Five	4,000.00	2/27/2008			
7			FECA	PAC	Payee Six	Recipient Six	5,000.00	1/31/2008			
8											

The date will appear correctly in column J;

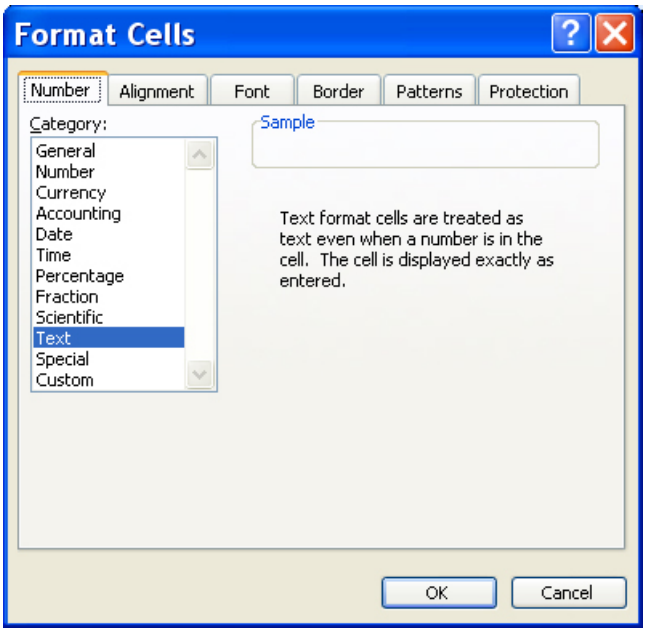
- Click in cell J2, grab the lower right hand corner + drag the length of the column (this extends the formula to those cells);



	A	B	C	D	E	F	G	H	I	J	K
1	name		type	contributorName	payeeName	recipientName	amount	date			
2	PAC		FECA	PAC	Payee One	Recipient One	2,500.00	39555		4/17/2008	
3			FECA	PAC	Payee Two	Recipient Two	1,500.00	39582		5/14/2008	
4			FECA	PAC	PayeeThree	Recipient Three	2,500.00	39254		6/21/2007	
5			FECA	PAC	Payee Four	Recipient Four	2,500.00	39513		3/6/2008	
6			FECA	PAC	Payee Five	Recipient Five	4,000.00	39505		2/27/2008	
7			FECA	PAC	Payee Six	Recipient Six	5,000.00	39478		1/31/2008	
8											

Once the mouse is released the dates should appear correctly;

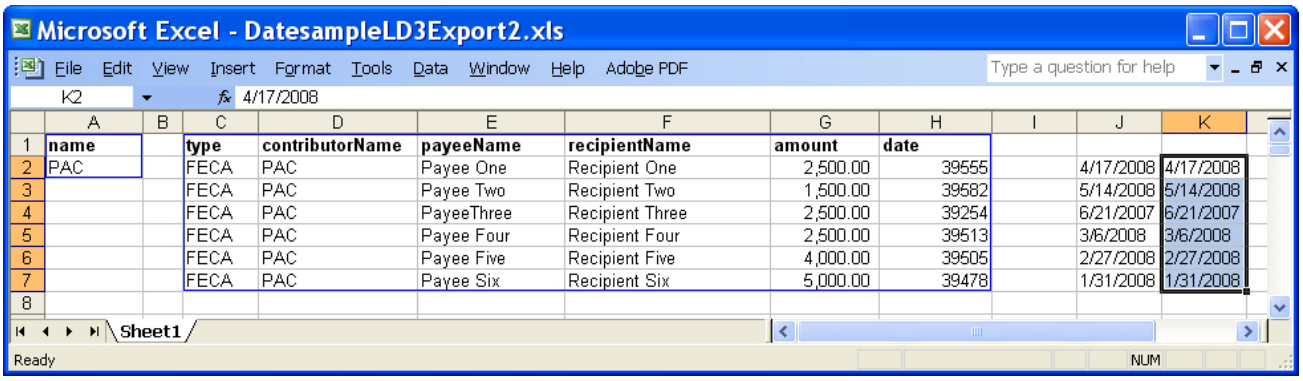
- Highlight column J, right click and choose Format Cells;



- Click on the Number tab and select Text from the Category menu, then click OK;
- Repeat the steps to set the formatting to text for column K (can be any column except I);
- Copy the dates from column J;

- Click on the K2 cell and right click, then select Paste Special;

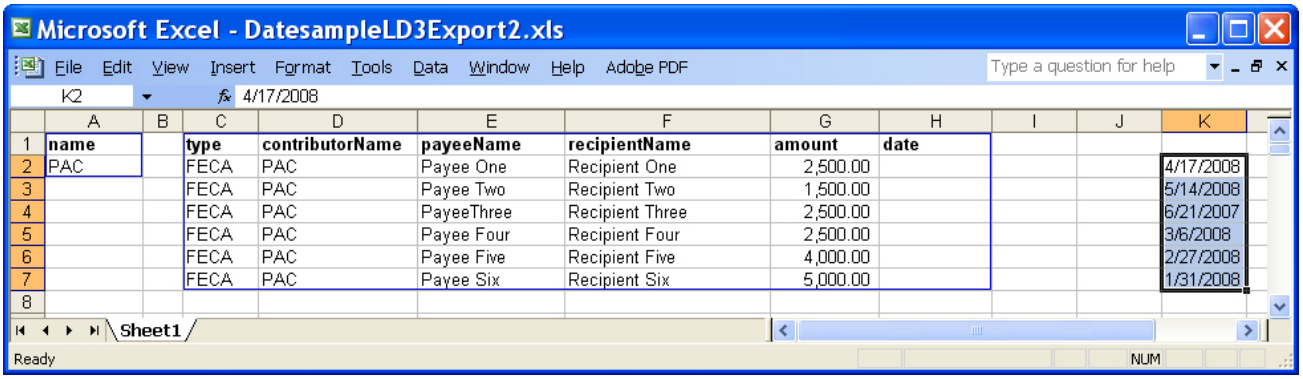
- Click the Values radio button and click OK;



	A	B	C	D	E	F	G	H	I	J	K
1	name		type	contributorName	payeeName	recipientName	amount	date			
2	PAC		FECA	PAC	Payee One	Recipient One	2,500.00	39555		4/17/2008	4/17/2008
3			FECA	PAC	Payee Two	Recipient Two	1,500.00	39582		5/14/2008	5/14/2008
4			FECA	PAC	PayeeThree	Recipient Three	2,500.00	39254		6/21/2007	6/21/2007
5			FECA	PAC	Payee Four	Recipient Four	2,500.00	39513		3/6/2008	3/6/2008
6			FECA	PAC	Payee Five	Recipient Five	4,000.00	39505		2/27/2008	2/27/2008
7			FECA	PAC	Payee Six	Recipient Six	5,000.00	39478		1/31/2008	1/31/2008
8											

The corrected date values have been pasted into column K;

- Delete the date from the cells in columns H and J;



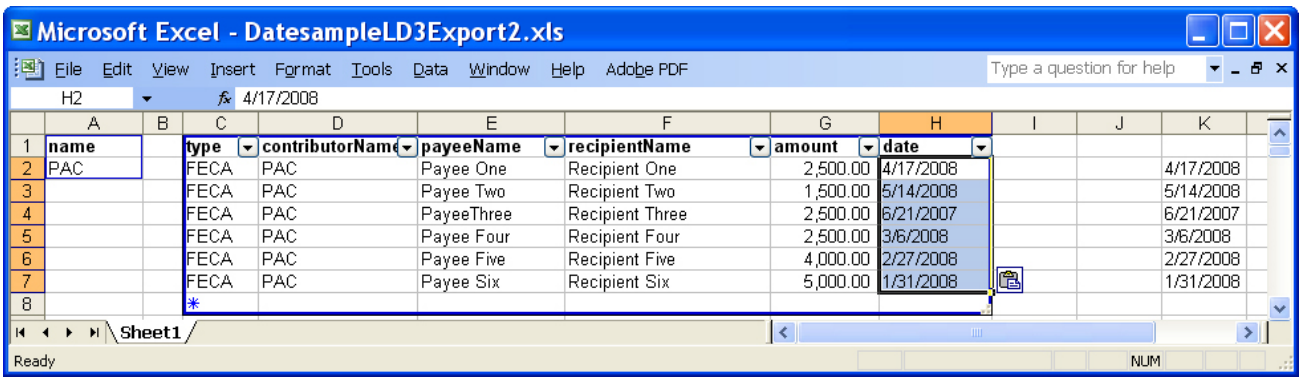
	A	B	C	D	E	F	G	H	I	J	K
1	name		type	contributorName	payeeName	recipientName	amount	date			
2	PAC		FECA	PAC	Payee One	Recipient One	2,500.00				4/17/2008
3			FECA	PAC	Payee Two	Recipient Two	1,500.00				5/14/2008
4			FECA	PAC	PayeeThree	Recipient Three	2,500.00				6/21/2007
5			FECA	PAC	Payee Four	Recipient Four	2,500.00				3/6/2008
6			FECA	PAC	Payee Five	Recipient Five	4,000.00				2/27/2008
7			FECA	PAC	Payee Six	Recipient Six	5,000.00				1/31/2008
8											

- Highlight column H, right click and select Format cells:

  Check that the column is defined as text, if it is hit OK. If not, select Text and OK;

- Highlight and copy the cells from column K;

- Paste the cells into column H:



	A	B	C	D	E	F	G	H	I	J	K
1	name		type	contributorName	payeeName	recipientName	amount	date			
2	PAC		FECA	PAC	Payee One	Recipient One	2,500.00	4/17/2008			4/17/2008
3			FECA	PAC	Payee Two	Recipient Two	1,500.00	5/14/2008			5/14/2008
4			FECA	PAC	PayeeThree	Recipient Three	2,500.00	6/21/2007			6/21/2007
5			FECA	PAC	Payee Four	Recipient Four	2,500.00	3/6/2008			3/6/2008
6			FECA	PAC	Payee Five	Recipient Five	4,000.00	2/27/2008			2/27/2008
7			FECA	PAC	Payee Six	Recipient Six	5,000.00	1/31/2008			1/31/2008
8			*								

Note: You do not need to do a special paste this time;

- Delete the data from column K.

To export the data in your spreadsheet as XML:

- Open your saved Microsoft Excel file completed in the above steps;
- On the toolbar, click on the **Data** menu;
- Click on **XML**, and select **Export**:

  A “save as” window titled Export XML will appear.
- Navigate to the directory location of your choice (remember where you put it, you’ll need this xml file for use with the import tool);
- Enter a file name and click **Export**:

  The XML file has been exported to the directory selected. The spreadsheet remains intact and should be closed and saved after the export.

Frequently Asked Questions

The topics listed below provide answers to commonly asked questions about the Lobbying Disclosure Contribution Reporting System.

Accessing the Contribution System

How do I sign into the system to file my report?

Registrants will use the same ID and password that they use to file other Lobbying Disclosure reports. Lobbyists must be verified by their employer and set their own password to sign into the system.

See Accessing the System for step by step instructions

I am an administrative assistant at a lobbying firm with 50 lobbyists. Can I submit a contribution report for each of our lobbyists along with the registrant contribution report?

No. The law requires that each actively registered lobbyist certify their own report.

Several employees in my firm are responsible for filing quarterly reports. Can multiple employees sign into the Registrant's account on the contribution system at the same time?

No. Only one person at a time should sign into the system for the registrant.

I am no longer with my employer and wish not to contact the firm. How can I get activated to file my contribution report?

Please contact the House Legislative Resource Center at (202) 226-5200 about activating your account.

I activated one of our lobbyist accounts, but the lobbyist says they did not receive their activation email. How can I get the account activated so the lobbyist can file their contribution report?

You must verify that you have entered the email address correctly for the lobbyist and that email from lcaccounts@mail.house.gov is not being sent to the lobbyist's junk mail folder. When you are sure the email address is correct and that the email is not being sent to junk mail, please contact the House Legislative Resource Center at (202) 226-5200 about resending the activation email.

I use an automatic spam filter on my email. How do I ensure that I will receive the activation email?

You must add lcaccounts@mail.house.gov and lcefiling@mail.house.gov to your list of accepted emails if you are using a spam filter. Some activation emails have bounced back to our server requiring a response from us to be accepted. These requests will not be responded to; you must contact your IT support staff if you need help in getting emails from the Contribution System accepted automatically.

Filing Contribution Reports

I am a retired lobbyist. What steps are in place to make sure that I do not receive a non-filing notice erroneously?

The first step is for the registrant to list your name on line 23 of the LD-2 form to reflect your new status. The second step is for the registrant to sign into the Contribution System, update the status on your account to inactive and enter an effective date that falls within the filing period that you were listed on line 23 of the LD-2 filing.

I am a lobbyist who works for more than one registrant. What is the filing procedure for this situation?

You should file one LD-203 form disclosing all contributions.

If a registrant and its lobbyists terminate, does the terminated status for both transfer to the Contribution system?

No. The registrant must file a termination report for each client, and sign into the Contribution System and update the status for each lobbyist to inactive with an effective date that falls within the reporting period that they inactivated the client.

I am a retired lobbyist who was hired on February 1. The mid-year contribution reporting period covers activity that occurred from January 1 through June 30. Do I report my hiring date of February 1 or do I need to include contributions made in January?

You must report all contributions you made as an actively registered lobbyist during the reporting period. If you were not an actively registered lobbyist in January, then you only need to report your contributions from your hiring date through the end of the reporting period.

As of June 30, I am leaving my firm and will no longer be a lobbyist. Do I still need to file the mid-year LD-203 since I won't be at my firm when the report is due in July?

Yes. You will still need to file the LD-203 report for any reporting period for which you were an active lobbyist.

I am a self-employed lobbyist. Do I need to file two LD-203 reports?

Yes. You must file one contribution report as a registrant, and a second contribution report as an individual lobbyist.

Working with the Contribution Report Form

How can I access the LD-203 form to file my reports?

You must sign into the system and click on the LD-203 tab in the header bar to access the form.

Is the form pre-populated like the LD-1 and LD-2 forms are?

Yes. When you sign into the system, the contribution form is pre-populated based on your account information for both Windows and Macintosh users.

How do I update information that is pre-populated?

If you are a registrant, you can update the contact name using the Account Information screen. Registrant mailing addresses must be updated by filing an amended registration with the new address.

If you are a lobbyist, you can update all of the information using the My Account screen.

Can I import FEC data into the form?

No. FEC data cannot be directly imported into a contribution form.

An import tool has been developed for IT professionals that will import XML data into registrant forms. If you are not familiar with XML or do not have the appropriate IT support to utilize the import tools that are provided, please use the contribution form to create and file your contribution reports.

See Importing XML Data for more information

Do I need an electronic signature to sign and file my report?

No. The system uses the ID and password you used to sign into the system to sign your form automatically when you submit your report.

I am a registrant. What name will be displayed when I sign and file my report?

The name listed in the system as the contact person will be inserted as the individual who signed the report.

See Working with the Contribution Form for step by step instructions

Reviewing House and Senate Gift and Travel Rules

How can I review the House and Senate travel rules?

The House gift and travel rules are available online from the House Committee on Standards of Official Conduct website: http://ethics.house.gov/Media/PDF/2008_House_Ethics_Manual.pdf

The Senate gift and travel rules are available online from the Senate Committee on Rules and Administration website: http://rules.senate.gov/senaterules/rule35.php

Locating Filed Contribution Reports

How can I check to see if all the lobbyists in my firm have filed their LD-203 reports?

Filed contribution reports are available on the Secretary of the U.S. Senate and the Clerk of the U.S. House of Representatives web sites.

http://disclosure.senate.gov http://lobbyingdisclosure.house.gov

Index

A

Accessing the Contribution System 60
Accessing the System 54
Account Prerequisites 5
Adding New Lobbyist Accounts 19

C

Correcting Date Fields 57
Correcting Email Addresses 18
Creating a New Form 34

F

Filing Contribution Reports 61
Filing Deadlines 2
Filing Your Form 48

G

General Filing Requirements 1

I

Importing XML Data 41, 56
Importing XML files into the Contribution Form: 42

L

Line by line Instructions 52
Locating Filed Contribution Reports 63
Locating Lobbyist ID Numbers 8
Locating Lobbyist Passwords 11
Locating Registrant ID Numbers 6
Locating Registrant Passwords 10
Locating Your ID Number 6
Locating Your Password 10

O

Obtaining a Lobbyist ID and Password 6
Obtaining a Registrant ID and Password 6

P

Penalties 2
Public Availability 2

R

Requesting Employer Transfers 31
Review and Compliance 2
Reviewing House and Senate Gift and Travel Rules 63
Reviewing Lobbyist Accounts 14

S

Signing In to the System 12
System Overview 3
System Requirements 3

U

Understanding Electronic Filing 3
Updating Lobbyist Account Information 27
Updating Lobbyist Contact Information 28
Updating Passwords 30
Updating Registrant Contact Information 26
Updating Security Questions 30
Using a Database to Create an XML Import File 41
Using Microsoft Excel to Create an XML Import File 41
Using Saved Forms 45

V

Verifying Previously Registered Lobbyists 15
Viewing the Training DVD on a Computer 54

W

Where to File Forms 2
Where to Get Help 4
Who Must File 1
Working with the Contribution Report Form 62