

How to Update Municipal Lobbying Quarterly Reports in NonCompliance Portal

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| CITY CLERK PORTAL | |
|---|---|
| Please continue to utilize the same "CCL Number" each year during the Annual Registration period when you register as a Lobbyist, Lobbying Entity or Client. No need to create a new account or obtain a new CCL Number. Your "CCL Number" will stay the same as you register each year. | If this is your first time registering as a Lobbyist, Lobbying Entity or Client, a CCL Number will be assigned to you once you have completed your registration. |
| | First time here? |
| PASSWORD: | Forgot user name or password? |
| SIGN IN □ Remember me on this computer | |

On the right side of the screen, find your lobbying registration and click on the CCL# link.

| REGISTRA | RECENT ACTIVITY | | |
|-----------------------------|-----------------------------|-------------------------|---|
| ₽ <u></u> | S = | \bigcirc | CCL515907 - Lobbyist Registration I City Hall PLZ Boston, MA. 02108 Status: NonCompliance |
| Apply for a Registration | Pay Registration Fees | Search Registrations | |

From the Application Status screen, click the "Submit Reporting" button to begin your reporting.

| pplication Type: | LOBBYIST F | REGISTRATION | | | |
|--------------------|-------------|-----------------|---------|-----------|---------|
| pplication Number: | CCL515912 | | | | |
| Site Location: | 1 CITY HALL | PLZ 03 BOSTON M | A 02108 | | |
| Primary Applicant: | KATHERINE | E MCCORMACK COE | 3 | | |
| Issue Date: | 3/15/2021 | | | | |
| Milestone: | REPORTING | 3 | | | |
| FEES | | | | | |
| DESCRIPTION | | | | | |
| | TOTAL | UNPAID | STATUS | PAID DATE | ACTIONS |

On the next screen, click on the *Application And Quarterly Reporting Details* box to get to the quarterly reporting screen.

| Desistration | Amplicant | Amplication and |
|-----------------------------|--|---|
| Registration Information | Applicant | Application and Quarterly Reporting |
| 5 | katherine mccormack COB 15 Arden Street 15 Allston MA | Details |
| usiness Type: | 02134 | Detutio |
| lone | (774)279-2004 | Detail page information. |
| pplication Type: | () | Click here if you are looking |
| obbyist Registration | | to submit your quarterly reporting. |
| | | |

On the next screen you will see grids for quarterly reporting entries. These grids may differ if you are registered as an entity, client or lobbyist.

You will see one row from the previous quarters marked as "NonCompliance" if you missed that reporting period.

You should add new items for the missed reporting period and submit your updates. Once these new rows are added with "No" activity or "Yes" activity, the NonCompliance row will be removed.

| YEAR | QUARTER | ACTIVITY? | CLIENT | SUBJECT | SUPPORT? | |
|------|---------|--------------|------------------------------|-----------------------------|----------|------|
| 2022 | 1st | Noncompliant | | | | View |
| 2021 | 4th | Yes | massport CCL515912 | runway extensions LegAct | S | View |
| 2021 | 4th | Yes | location survey CCL515912 | store location Decision | S | View |

QUARTERLY LOBBYIST ACTIVITIES

To add an item into any of the grids, click on the "Add...." link below the grid.

| QUARTE | | ΑCTIVITY | | | | |
|---------------|------------|-----------|------|-------------------|------------------|--------|
| YEAR | QUARTER | ACTIVITY? | LOB | BYIST | INCURRED OR PAID | |
| 2021 | 4th | Υ | | erine m 678667 | paid \$234.00 | View |
| Add entity ac | ctivity | | | | | |
| QUARTE | RLY CONTRI | BUTIONS | | | | |
| YEAR | QUARTER | ACTIVITY? | DATE | RECIPIENT | OFFICIAL | AMOUNT |
| Add Contribu | ition | | | | | |
| | | | | | | |

When you click the "Add..." link, a window will pop-up for you to enter information.

Scenario 1: No Activities or Contributions

If you do not have anything to report for the quarter, you can enter the "Year", "Quarter", and "Reporting Activity?" fields only on the Activities grid and then click "Submit"

| UARTERL | | | | × | |
|-------------------|------------------------|--------------------|---------------------|--------|------|
| YEAR C | YEAR * | QUARTER * | REPORTING ACTIVITY? | | |
| 2021 4 | 2022 🗸 | January 1 to Marcl | No | \sim | View |
| | LOBBYIST | | REGISTRATION NUMBER | | |
| d entity activity | | | | | |
| | ISSUE (PLEASE DESCRIBE | :) | | | |
| UARTERL | | | | | |
| /EAR QI | PAID OR INCURRED? | | AMOUNT | // | F |
| d Contribution | Select One | \sim | | | |
| | SUBMIT | | | | |
| SUMMAR | | | | | |

This will add a row to the grid with the "Activity?" column marked with 'No'

| QUARTERLY ENTITY ACTIVITY | | | | | | | |
|---------------------------|---------|-----------|--------------------------|------------------|------|--|--|
| YEAR | QUARTER | ACTIVITY? | LOBBYIST | INCURRED OR PAID | | | |
| 2022 | 1st | N | | \$0.00 | View | | |
| 2021 | 4th | Υ | katherine m CCL678667 | paid \$234.00 | View | | |
| Add entity ac | ctivity | | | | | | |

You can continue to the <u>Summary Page</u> and submit your report of no activity.

Scenario 2: Activities and/or Contributions

If you have activity for the quarter, you can enter all of the fields into the pop-up window and click submit. This will add a row to the grid with the Activity? Column marked with "Yes" *Note: if you have more than one activity to report, you can enter multiple rows with Activity? Marked as "Yes"*

| LOBBYIST | REGISTRATION | START DATE | TERMINATION DATE | DESCRIPTION | |
|---------------------|----------------------|--------------------------|---------------------|-----------------|------|
| Charise Jacobs | | | | × | View |
| Search Tool | YEAR * | QUARTER * | REPORTING ACT | | |
| | 2022 🗸 | January 1 to Marcl | V Yes | \checkmark | |
| QUARTERL | LOBBYIST | | RECISTRATION NUMBER | | |
| YEAR (| Charise Jacobs | | CCL443873 | | |
| | ISSUE (PLEASE DESCRI | BE) | | | |
| | Zoning matters relat | ed to Redevelopment of H | arbor Garage site | | View |
| | | | | h | |
| | PAID OR INCURRED? | | AMOUNT | | View |
| | Paid | \sim | 200 | | |
| Add entity activity | SUBMIT DE | LETE | | | |
| OUARTERL | YCONTRIBUTIC | NS | | | |
| | ENTITY ACTIV | | | | |
| YEAR Q | UARTER AC | CTIVITY? LOB | BYIST IN | ICURRED OR PAID | |
| 2022 1s | t Y | | | AID 200.00 | View |
| 2021 41 | th Y | | | iid :34.00 | View |

If you have contributions for the quarter, you can enter contribution rows with the "Reporting Activity?" marked as "Yes"

Note: if you have more than one contribution to report, you can enter multiple rows with Activity? Marked as "Yes"

Add entity activity

| entity activity | | × |
|-----------------------------|------------------------|-----------------------|
| YEAR * | QUARTER * | REPORTING ACTIVITY? * |
| | / January 1 to Marcl 🗸 | Yes 🗸 |
| R Q CONTRIBUTION DATE | AMOUNT | |
| 02/09/2022 | 300 | |
| RECIPIENT | | |
| Michelle Wu | | |
| SUMMAR MAYOR/CITY COUNCILOR | | |
| Mayor | | |
| SUBMIT | | |

| QUARTERLY CONTRIBUTIONS | | | | | | | |
|-------------------------|---------|-----------|----------|-------------|----------|--------|------|
| YEAR | QUARTER | ACTIVITY? | DATE | RECIPIENT | OFFICIAL | AMOUNT | |
| 2022 | 1st | Y | 2/9/2022 | Michelle Wu | Mayor | 300 | View |
| Add Contrib | oution | | | | | | |

Once you are done with your reporting you can continue to the <u>Summary page</u> and submit your report.

Finalize Your Report

Upon completion of adding your reporting information, click on the "Summary" button at the bottom of the screen.

| | ERLY CONTR | RIBUTIONS | | | | | |
|-------|------------|-----------|----------|-------------|----------|--------|------|
| YEAR | QUARTER | ACTIVITY? | DATE | RECIPIENT | OFFICIAL | AMOUNT | |
| 2022 | 1st | Υ | 2/9/2022 | Michelle Wu | Mayor | 300 | View |
| | | Υ | 2/9/2022 | Michelle Wu | Mayor | 300 | Vie |
| ution | | | _, _, | | , | | |
| | | | | | | | |

On the Summary screen, click the acknowledgement checkbox and click the "Save" button to submit your reporting.

| I hereby acknowledge under the pains and penalties of perjury that I have read and understand the City of Boston's Lobbyist Registration and Regulation Requirements Overview as mandated by City Ordinance, Chapter 2-15.1. | | | | | | |
|--|--------|--|--|--|--|--|
| | SAVE | | | | | |
| | Cancel | | | | | |

You will land on a confirmation screen and see that your application is back in a "Registered" status. You can come back to this screen and click "Edit" at any time throughout the reporting period (1st-20th) if you need to adjust your reporting entry.

| APPLICATION CONFIRMATION | | | | | | | |
|---|------------------------------------|----------|--|--------|--|--|--|
| Your application details and next steps are summarized below. | | | | | | | |
| Registration Number: | CCL452376 | | | | | | |
| Registration Type: | CLIENT REGISTRATION | | | | | | |
| Site Location: | 1 CITY HALL PLZ 03 BOSTON MA 02108 | | | | | | |
| Primary Applicant: | KATHERINE MCCORMACK COB | | | | | | |
| Milestone: | REGISTERED | | | | | | |
| | | | | | | | |
| APPLICATION FEES | | | | | | | |
| DESCRIPTION | | AMOUNT | | ACTION | | | |
| Lobbyist Client | | \$150.00 | | | | | |
| EDIT APPLICATION | | | | | | | |