

**GUIDANCE DOCUMENT** 

# BC LOBBYISTS REGISTRY USER GUIDE: CONSULTANT LOBBYIST REGISTRATION RETURNS

October 21, 2021

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#### PURPOSE OF THIS GUIDANCE DOCUMENT

#### **Notice**

This document is for information purposes only and does not constitute a decision or finding by the Registrar of Lobbyists for British Columbia or their delegates. This guidance does not affect the powers, duties or functions of the Registrar of Lobbyists, or their delegates, regarding any investigation or other matter under the *Lobbyists Transparency Act*, respecting which the Registrar and their delegates will keep an open mind. Responsibility for compliance with the *Lobbyists Transparency Act* remains with each lobbyist.

#### Introduction

The Lobbyists Transparency Act ("LTA") came into force on May 4, 2020. The legislation and the Lobbyists Transparency Regulation set out registration requirements for individuals and organizations engaged in lobbying activities.

Use the <u>Lobbyists Registry</u> to create and submit Registration Returns and Lobbying Activity Reports. You must also keep the information in your Registration Returns up to date.

Links to the complete text of the LTA and the Regulation are available by clicking "Help" on the top toolbar of each page of the Lobbyists Registry and selecting "Legislation".

This guide details how to create and manage Registration Returns. For more detailed information about Monthly Returns (Lobbying Activity Reports and updates to Registration Returns), please see <u>User Guide – Monthly Returns and Lobbying Activity Reports</u>.

#### **Getting Started**

You need an account in the Lobbyists Registry in order to create/update/submit Registration Returns and Lobbying Activity Reports. See <u>User Guide - Account Management</u>.

If you had registrations in the previous BC lobbyists registry (between 2010 and May 4, 2020), those registrations have been migrated into the current Lobbyists Registry. See <u>User Guide - Accounts and Registrations from the Previous Registry</u> if you need to reactivate an existing account and/or registrations.

#### **Accounts**

You will only ever have one account with the Lobbyists Registry. You will use this account to maintain separate Registration Returns for each of your clients. (If you are also the designated filer for an Organization, you will use the same account to declare lobbying activities for that Organization, in a separate Registration Return for the Organization.)

#### **Registration Returns for Clients**

Create a separate Registration Return for each client when you begin lobbying for that client. All activities for that client will be declared via that Registration Return and the Lobbying Activity Reports associated with that Registration Return.

# **DESIGNATED FILER DASHBOARD**

Once you sign in to the Registry with your account user name and password, you will see the Designated Filer Dashboard. From the Dashboard, you can create and update your Registration Returns and Lobbying Activity Reports. You can also update your account information.

#### **Designated Filer Menu**

The grey left-hand Designated Filer Menu allows you to:

- Update your Account Profile
- Update your Firm Profiles
- Sign out of the Lobbyists Registry



# **TABS: New Registrations, Current Registrations, Previous Registrations**

# TAB: New Registrations

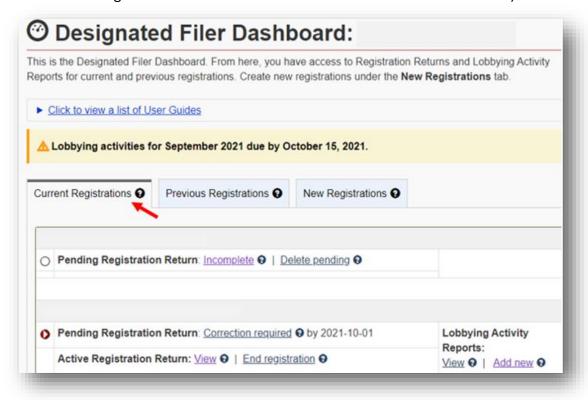
Create new Registration Returns under the "New Registrations" tab.



# **TAB: Current Registrations**

View/update active Registration Returns under "Current Registrations" tab.

(Names of client organizations have been blanked out for the screenshot below.)



### Status of Registration Returns Under the Current Registrations Tab

Active Registration Returns and Pending Registration Returns are just different versions of the same Registration Return.

An **Active Registration Return** is the most recent version that the public sees in the Registry. It has been activated by Registry staff. You can view, update, or end this Registration Return. You can also create Lobbying Activity Reports for this registration.

A **Pending Registration Return** is created when you begin a new Registration Return, or an update or reactivation, but have not yet certified & submitted it to the Registry for activation.

You will see one or more links beside **Pending Registration Return/Active Registration Return**. Click the information buttons **9** beside each link to see an explanation.

View <sup>2</sup>	Click to see the active Registration Return
Update registration if required 😌	Click to update the active Registration Return. This
	creates a pending Registration Return which you can
	edit and submit for activation.
Incomplete 0	You started a new Registration Return or an update to
	an existing Registration Return or started to reactivate
	an inactive Registration Return. Information is still
	required.
	Click to review/edit & submit the Registration Return
	to the Registry for activation.
Requires certification 0	You started a new Registration Return or an update to
1	a Registration Return or started to reactivate an
	inactive Registration Return.
	Clieb to manifest / adit 0 and mait the Decistmetics Detumn
	Click to review/edit & submit the Registration Return to the Registry for activation.
Delete needing 2	Click to delete a pending new, update or reactivation
Delete pending 0	of a Registration Return that has not been activated by
	Registry staff.
	Note: If there is an existing active registration, it will
	not be affected.
Correction required @	You submitted a new Registration Return or an update
	to a Registration Return or a reactivated Registration
	Return. Registry staff sent it back to you for
	correction. You may receive an email with details.
	Click to see notes from staff & enter corrections.
Submitted 🕣	You submitted a new Registration Return or an update
	to an existing Registration Return or a reactivated
	Registration Return to the Registry.
	Click to view the submitted Registration Return.

End registration @	Click to deactivate an active registration if lobbying
	activity has stopped. Note: you must reactivate a
	Registration Return within 10 days of resuming
	lobbying activity for this client.

# View and Create Lobbying Activity Reports Under the "Current Registrations" Tab

View/create/amend Lobbying Activity Reports under the "Current Registrations" tab.

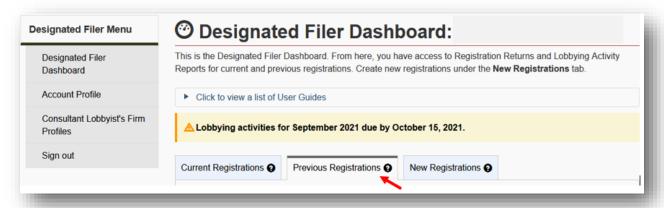


You will see the following links under **Lobbying Activity Reports**:

View 9	Click to open the list of existing Lobbying Activity Reports for this registration. You can amend or cancel an existing Lobbying Activity Report in the list.
Add new <sup>❸</sup>	Click to create a new Lobbying Activity Report for this registration.

# **TAB: Previous Registrations**

View/reactivate previous inactive Registration Returns under "**Previous Activities**" tab. See Previous Versions of Your Registration Returns below.

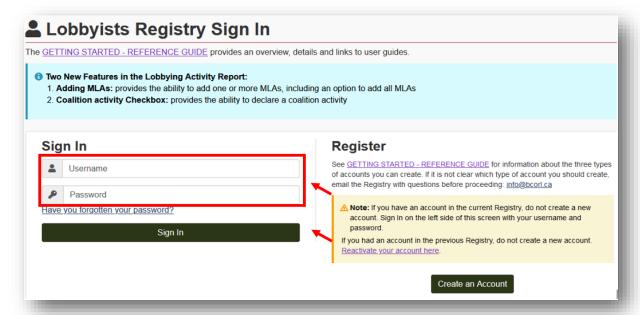


#### REPRESENTATIVE FILING ON BEHALF OF A CONSULTANT LOBBYIST

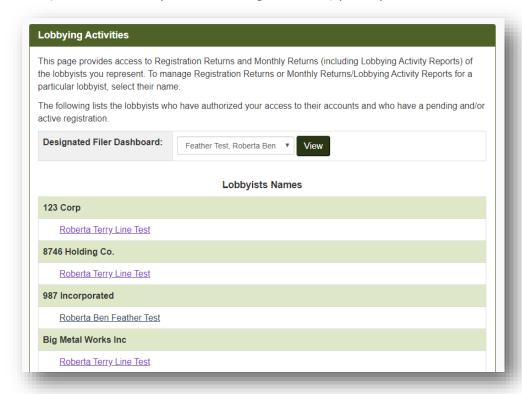
If you have a **Representative account,** a Consultant Lobbyist may authorize your access to the Consultant Lobbyist's Registration Returns and Lobbying Activity Reports so you can keep their filings up to date. See Quick Reference Guide for Representatives.

# Sign in as Representative and Go to Designated Filer's Dashboard:

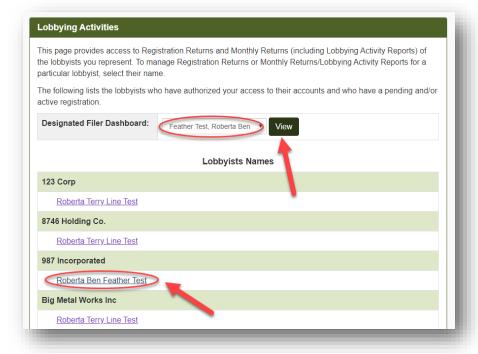
- 1. Go to the Lobbyists Registry sign-in page https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn
- 2. **Sign in** to your account with your user name and password.



3. You will be on your Representative Dashboard with access to a list of the Designated Filers (Consultant Lobbyists and/or Organizations) you represent.



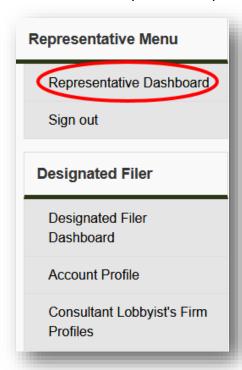
4. Click on a **Designated Filers name** in the table **or select the Designated Filer** from the drop-down menu and click "**View**".



5. You will be taken to that person's Designated Filer Dashboard.

From their Dashboard, you can create and update Registration Returns and Lobbying Activity Reports for that Designated Filer.

6. To return to your own Representative Dashboard, click "Representative Dashboard".



NOTE: when signed in with a Representative account, you can prepare and update Registration Returns and Lobbying Activity Reports, but you cannot certify & submit documents to the Registry with your own user name and password. Documents can only be certified & submitted after entering the Designated Filer's username and password.

#### CREATE A NEW CONSULTANT LOBBYIST REGISTRATION RETURN

#### **New Information Required**

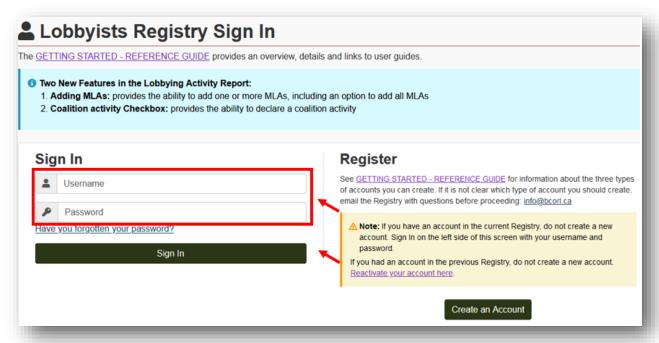
The *Lobbyists Transparency Act* (May 2020) requires you to report new information beyond what was required previously. This new information includes:

• Details regarding gifts or benefits made within the preceding 12 months to a BC public office holder being lobbied.

- Whether the lobbyist (and client of a consultant lobbyist) made political, sponsorship and recall contributions, on or after the date the writ was issued for the last provincial election.
- Whether a person or organization with a direct interest in the outcome of the lobbying activities has contributed over \$1,000 CDN toward the lobbying activities within the preceding 12 months.
- If your client requested and/or received any government funding in the preceding 12 months, the name of the government agency from which funds were requested, the amount requested, the amount received, and the relevant dates.
- Whether a lobbyist has in place an undertaking to comply with any relevant codes of conduct. If so, the name of the Code of Conduct, where the Code of Conduct is publicly available (URL), name and business contact information of the organization that is responsible for the administration of the code of conduct (including mailing address and email address).

#### **Create a New Registration Return**

- Go to the Lobbyists Registry sign-in page https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn
- 2. **Sign in** with your user name & password.

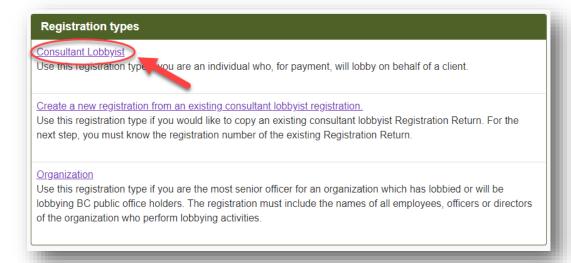


3. On the Designated Filer's Dashboard, click on the tab "New Registrations".



4. To create a new Consultant Lobbyist Registration Return, click on "Consultant Lobbyist" under the heading Registration Types.

If you are working with another Consultant Lobbyist who has already created a Registration Return for the same client, there is an option to copy that other lobbyist's details rather than re-creating the entire Registration Return. For information on creating a new Registration Return based on someone else's Return, please see the section "Create a new Registration Return by copying details from another lobbyist's registration" below in this User Guide.



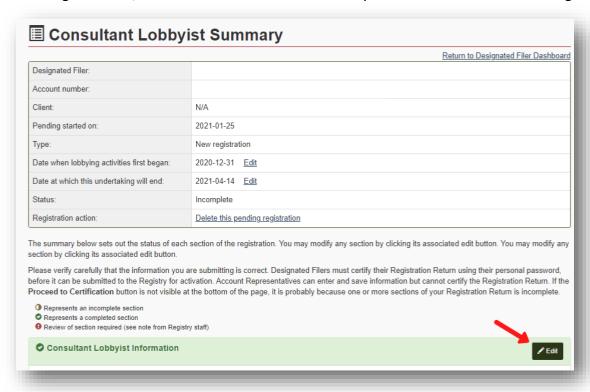
5. Select "New Client" from the drop-down menu (scroll to the bottom of your list of clients with registrations). Select "Save and Continue".



6. New Registration - Start Date screen: enter the date of your first lobbying activity for this client and click "Continue".

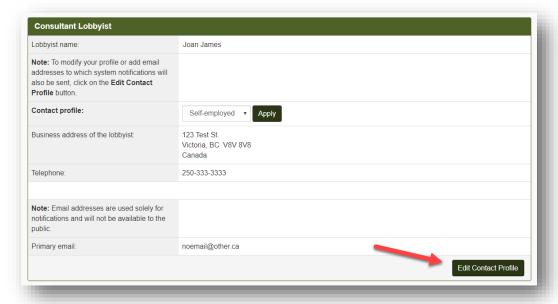


7. To get started, click "Edit" in the Consultant Lobbyist Information section heading.

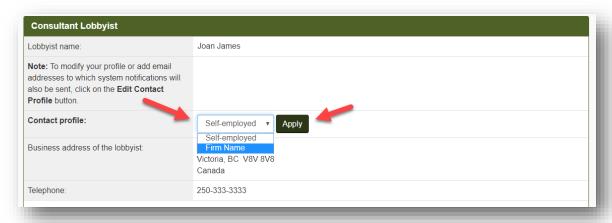


## Step 1 of 7: Consultant lobbyist information

8. If you need to make changes to correct your contact information, click "Edit Contact Profile".



9. If you are employed by a firm to lobby on behalf of your client, select the firm name in the "Contact profile" drop-down menu and click "Apply".



If the firm name is not showing in the drop-down menu, create a profile for the firm before continuing. You will need to leave the Registration Return and go back to the Designated Filer Dashboard.

Click on the "Dashboard" link in the upper left-hand corner and then select "Consultant Lobbyist's Firm Profiles" from the dashboard left hand menu.

Follow the instructions on the screen to Create/Edit/Remove a Consultant Lobbyist Firm Profile. See the document "<u>User Guide - Account Management</u>" for more information on creating Firm Profiles.

#### Former Public Office Holder Positions (BC)

10. Declare whether you are a BC former public office holder by selecting **Yes** or **No** from the drop-down menu.

If you're not sure, click on the 
 button for more information.

If No, proceed to Step 11 below.

If Yes, continue with the following steps:

 To add a BC former public office holder position, click "Add/Edit Public Office Position Details".

If you declared that you were a BC former public office holder and entered your BC former public office positions in a previous Registration Return, those details will be automatically copied into your new Registration Return. Verify that the details are correct.



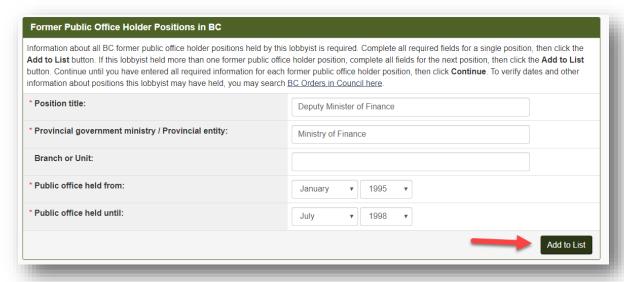
ii) Enter the position title, provincial government ministry / provincial entity, and the dates (month/year) you held the public office position. Then click "Add to List".



- iii) The former public office position(s) will be shown near the bottom of the screen. To add another former public office position, repeat the process shown above.
- iv) To edit a former public office position, **select the radio button** beside that position and click "**Edit Selected**".



When the details have been updated, click "Add to List" to save the changes.



v) If you entered a former public office holder position in error, you can delete it by selecting the radio button and clicking on "Remove Selected".



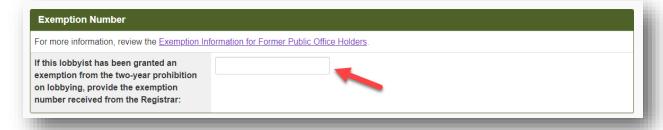
vi) When your list of former BC public office holder positions is complete and accurate, click "Continue".



11. If you held a BC former public office holder position within the past two years, you may not lobby unless an exemption has been granted by the Registrar. Enter your **exemption number** in the field given.

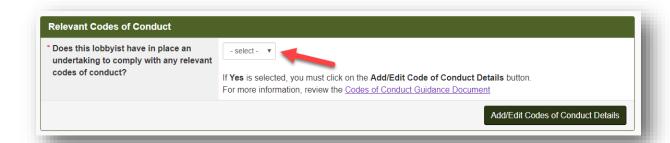
Information on applying for an exemption can be found here:

https://www.lobbyistsregistrar.bc.ca/lobbyists-transparency-act/exemption-information-for-former-public-office-holders/



#### **Relevant Codes of Conduct**

12. Declare whether you are bound to comply with any **relevant codes of conduct** by selecting **Yes** or **No** from the drop-down menu. More information can be found in our <u>Codes of Conduct</u> guidance.

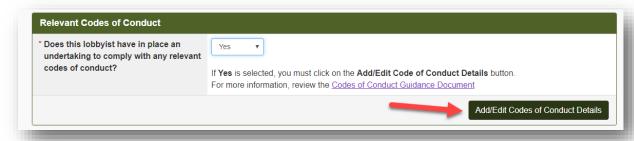


If you listed one or more codes of conduct in a previous Registration Return, those details will be automatically copied into your new Registration Return. Verify that the details are correct.

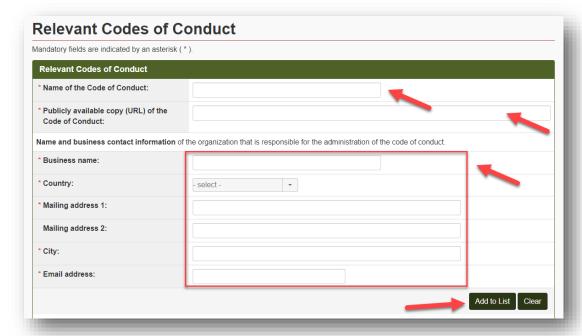
If No, proceed to Step 13 below.

If Yes, continue with the following steps:

i) List at least one code of conduct. To add a code of conduct, or edit an existing code of conduct, click on "Add/Edit Codes of Conduct Details".



ii) Enter the name of the code of conduct, publicly available URL, and the name and business contact information for the organization that is responsible for the administration of the code of conduct. Then click "Add to List".

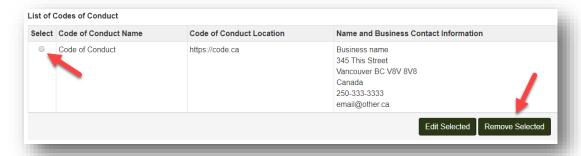


- iii) The code(s) of conduct will be shown near the bottom of the screen. To add another code of conduct, repeat the process shown above.
- iv) To edit, select the radio button beside the code of conduct & click "Edit Selected".

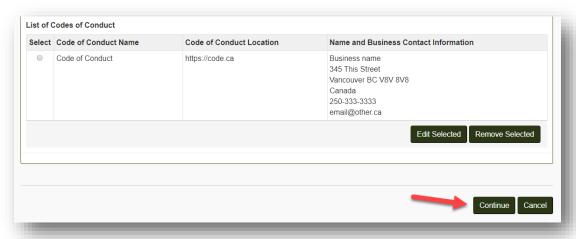
When the details have been updated, click on "Add to List" to save the changes.

email@other.ca	•	
		Add to List CI
	email@other.ca	email@other.ca

v) If you entered a code of conduct in error, delete it by **selecting the radio button** then click "**Remove Selected**".



vi) When your list of codes of conduct is complete and accurate, click "Continue".



Gifts or benefits provided to Public Office Holders

13. If you have given gifts or provided benefits to public office holders you are lobbying within the last 12 months, you must declare those in your Registration Return.

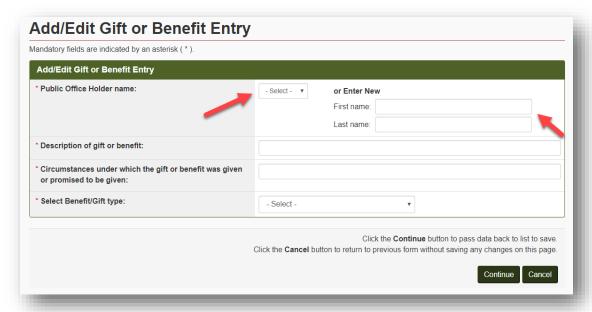
More information can be found in our <u>guidance on Lobbyist Gifts</u>, and we recommend you contact our office to discuss.

If you have no gifts or benefits to declare, proceed to Step 15 below.

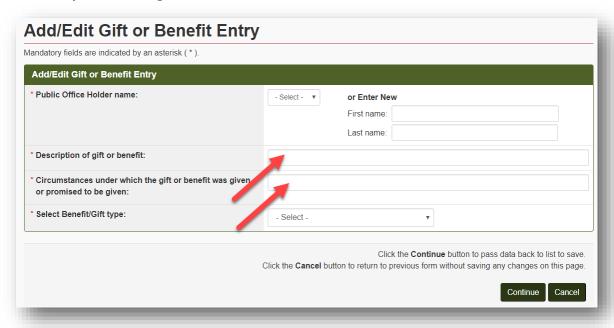
- 14. If you do have gifts or benefits to declare, continue with the following steps:
- i) To add a gift or benefit, click "Add Gifts or Benefits".



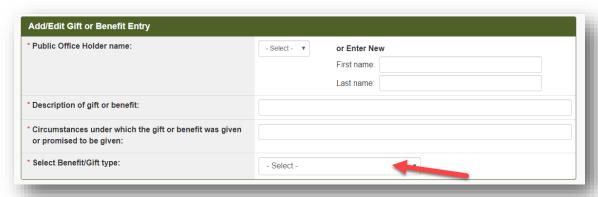
ii) Select a **name** from the drop-down menu (available if you previously declared a gift or benefit to a public office holder) OR enter the **First name** and **Last name** of the public office holder.



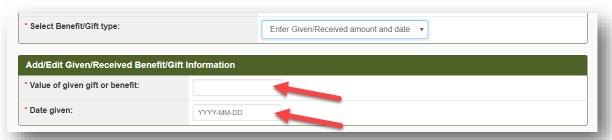
iii) Enter a description of the gift of benefit and the circumstances under which it was promised or given.



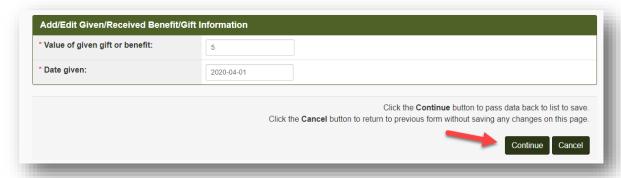
iv) Select the **Benefit/Gift type** from the drop-down menu, either Promised or Given/Received.



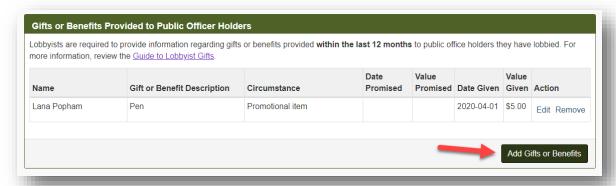
v) Enter the **Value of gift** (either promised or given/received) and the **Date the gift was** given or promised.



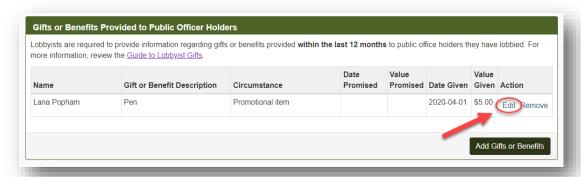
vi) Once the details of the gift or benefit are complete, click "Continue".



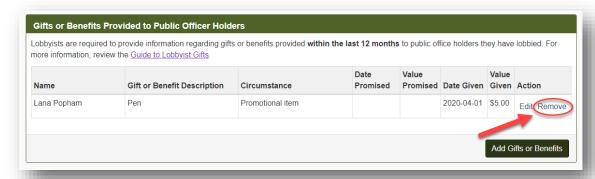
vii) The gifts promised or given will be displayed. To record another gift promised or given, click on "Add Gifts or Benefits" again and repeat the process above.



viii) To edit a recorded gift or benefit, click the "Edit" link.



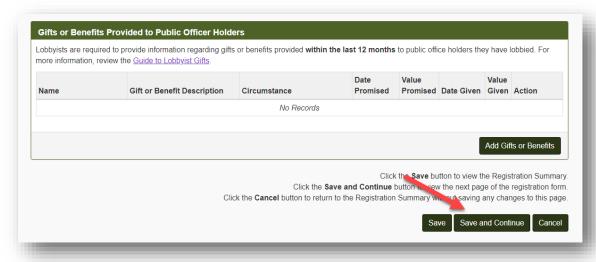
ix) If you entered a gift or benefit in error, delete it by clicking on the "Remove" link.



#### Save information

15. When all information on Step 1 is complete, click "Save and Continue" to continue to the next section of the Registration Return.

If you wish to save and finish later, click the "Save" link instead. That takes you back to the Consultant Lobbyist Summary screen.

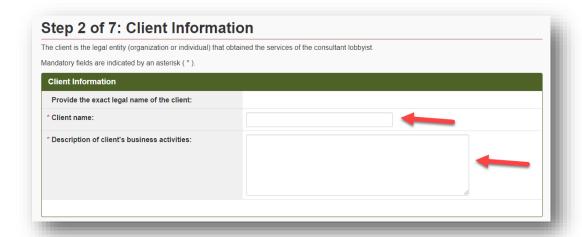


Step 2 of 7: Client information

# Client contact information

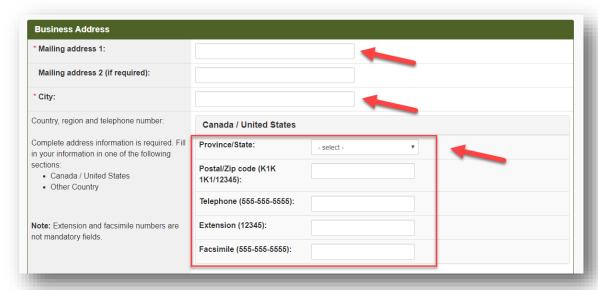
16. Enter the exact legal name of the client and a description of the client's business activities.

Do not use acronyms or abbreviations unless the meaning will be clear to all readers. If there is an acronym or abbreviation in the legal name of the client (e.g. as registered in the Corporate Registry), enter the legal name.



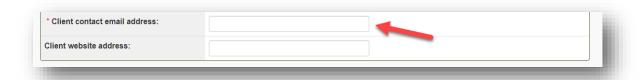
#### 17. Enter the client's business address.

If your client is outside of Canada and the United States, complete the "Other Country" section.



#### 18. Enter the client contact email address.

You can also record your client's website address (optional).



Political, Sponsorship and Recall Contributions

If you have lobbied or plan to lobby a member of the Legislative Assembly (MLA), including a Minister or the Premier, on behalf of this client, you must declare whether you or your client

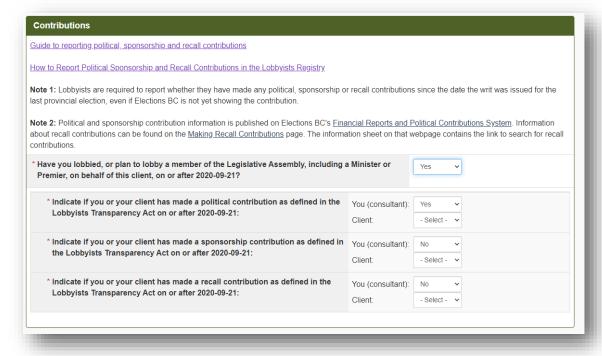
made a political, sponsorship or recall contribution since the date of writ for the last provincial election.

#### For more information, see

- Political, Sponsorship and Recall Contributions
- How to Report Political, Sponsorship or Recall Contributions in the Lobbyists Registry



If you answer yes to the question about lobbying an MLA, the questions about whether you or your client made a political, sponsorship or recall contribution then appear. Select Yes or No.

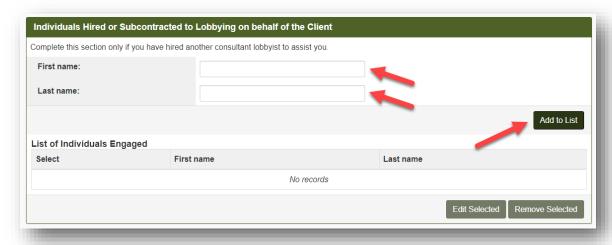


Other individuals you hired to lobby on behalf of the client

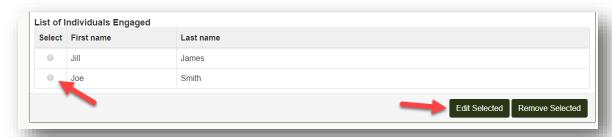
19. If you hired or subcontracted other consultant lobbyists to lobby for this client, provide their names in this section of your Registration Return. **NOTE: they also need to create their own Registration Return and report their lobbying activities on behalf of the client.** 

If you have not hired/subcontracted consultant lobbyists to lobby for this client, skip this and proceed to Step 20 below.

i) Enter the **First name** and **last name** of another consultant lobbyist you hired/subcontracted, then click "**Add to List**".



- ii) Repeat as needed.
- iii) To edit a name, select the radio button and click "Edit Selected".



When the details have been updated, click on "Add to List" to save the changes.



iv) If you entered an individual in error, you can delete their name by **selecting the** radio button and clicking "Remove Selected".



#### Contingency payment

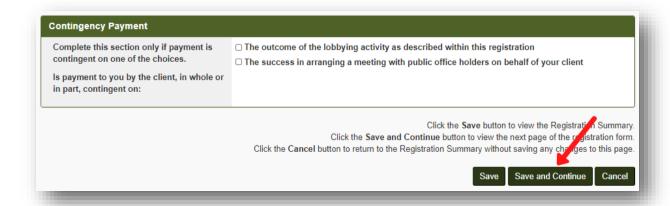
20. Declare whether your payment is contingent upon the outcome of the lobbying activity and/or the success in arranging a meeting on behalf of your client by selecting the relevant check box(es).



#### Save information

When all information on Step 2 of 7 is complete, click "Save and Continue" to continue to the next section of the Registration Return.

If you wish to save and finish later, click the "Save" link instead. That takes you back to the Consultant Lobbyist Summary screen.

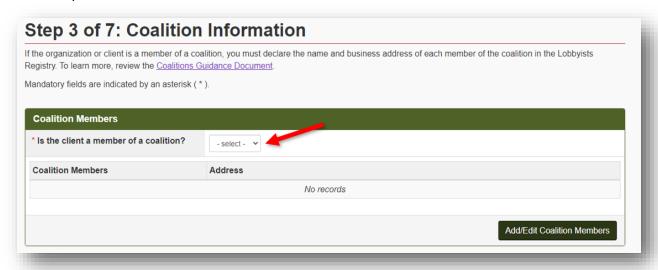


#### Step 3 of 7: Coalition information

For more information, see our Coalitions guidance document.

#### Coalition members

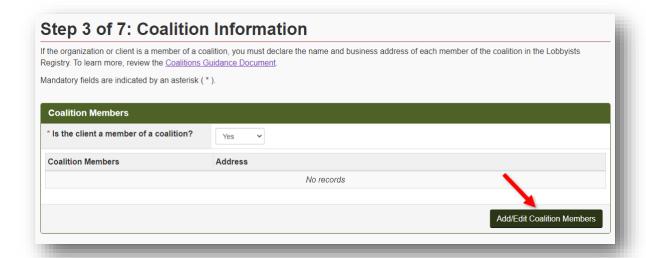
21. Declare whether your client is a member of a coalition by selecting **Yes** or **No** from the drop-down menu.



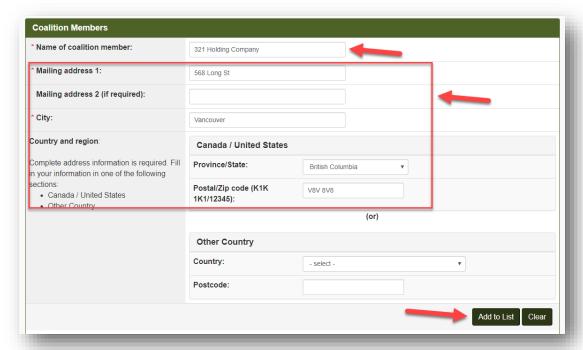
If No, proceed to Step 22 below.

If Yes, continue with the following steps:

i) If your client is a member of a coalition the purposes of section 4(1)(h) of the LTA (see <u>Coalitions</u>), you must enter the names and business addresses of the other organizations that are coalition members. Click "Add/Edit Coalition Members".



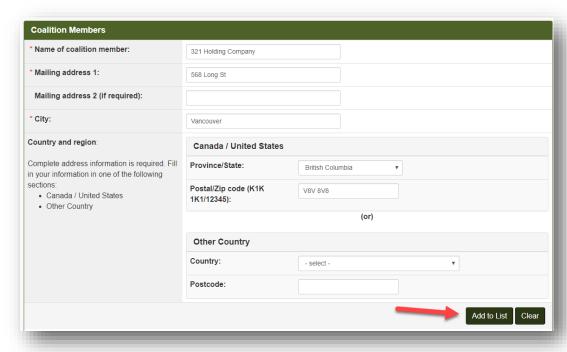
ii) Enter the name of one organization that is a member of the coalition, and the business mailing address of the organization. Click "Add to List".



- iii) The list of coalition members will be shown near the bottom of the screen.
- iv) **Repeat** the process until the names of all organizations that are members of a coalition to which your client belongs have been entered.
- v) To edit a coalition member, select the radio button and click on "Edit Selected".



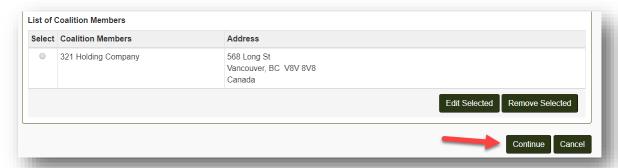
When the details have been updated, click "Add to List" to save the changes.



vi) If you entered a coalition member in error, delete the entry by **selecting the radio button** and clicking "**Remove Selected**".



vii) When the list of coalition members is complete and accurate, click "Continue".

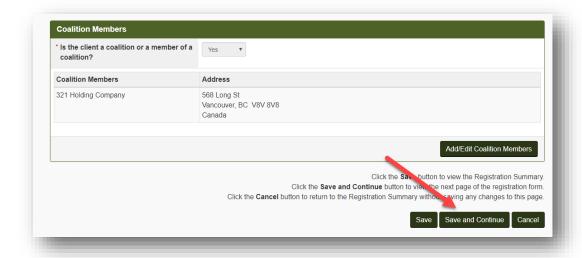


**Note:** If you previously selected "Yes" and entered coalition members, and need to change your answer to "No", you first need to delete all entries for coalition members by clicking "Add/Edit Coalition Members".

#### Save information

22. When all information on Step 3 of 7 is complete, click "Save and Continue" to continue to the next section of the Registration Return.

If you wish to save and finish later, click the "Save" link instead. That takes you back to the Consultant Lobbyist Summary screen.



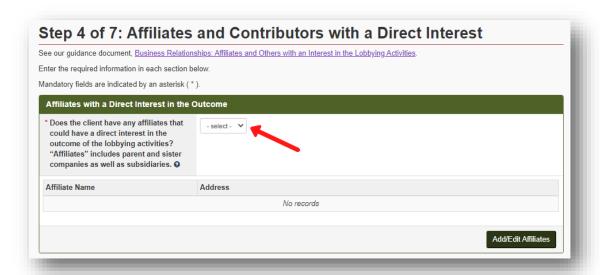
Step 4 of 7: Affiliates and contributors with a direct interest

For more information, see the guidance document <u>Business Relationships: Affiliates and Others</u> with an Interest in the Lobbying Activities.

Affiliates with a direct interest in the outcome

23. Declare whether your client has any affiliates that could have a direct interest in the outcome of the lobbying activities by selecting **Yes** or **No** from the drop-down menu.

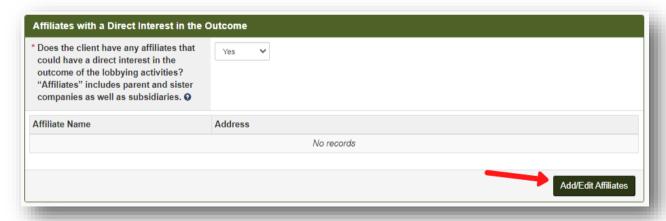
For more information, click on the  $oldsymbol{\Theta}$  button.



If No, proceed to Step 24 below.

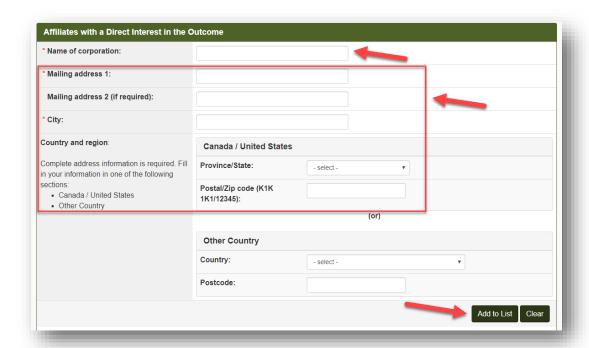
If Yes, continue with the following steps:

i) If you select Yes, record at least one affiliate. Click "Add/Edit Affiliates".

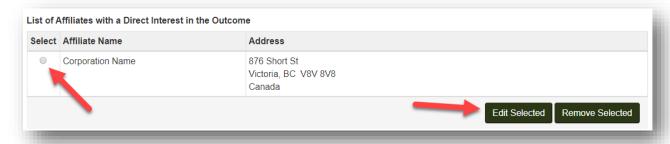


ii) Enter Name of corporation and business mailing address. Click "Add to List".

If the affiliate is outside of Canada and the United States, fill out the "Other Country" section.



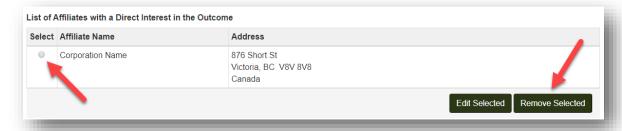
- iii) The affiliate(s) will be shown near the bottom of the screen. To add another affiliate, repeat the process shown above.
- iv) To edit information, select the radio button beside an affiliate and click "Edit Selected".



Affiliates with a Direct Interest in the Outcome Name of corporation: Corporation Name \* Mailing address 1: 876 Short St Mailing address 2 (if required): \* City: Victoria Country and region: Canada / United States Complete address information is required. Fill Province/State: British Columbia in your information in one of the following Postal/Zip code (K1K V8V 8V8 Canada / United States 1K1/12345): · Other Country (or) Other Country Country: - select -Postcode:

When the details have been updated, click "Add to List" to save the changes.

v) If you entered an affiliate in error, delete it by **selecting the radio button** and clicking "**Remove Selected**".

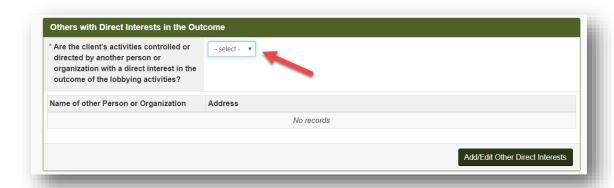


vi) When the list of affiliates is complete and accurate, click "Continue".



Others with a direct interest in the outcome

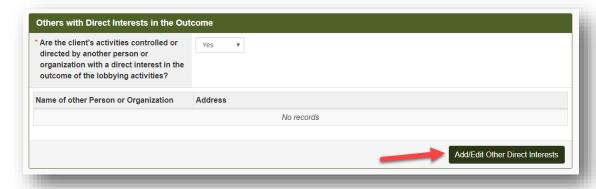
24. Declare whether your client's activities are controlled or directed by another person or organization with a direct interest in the outcome of the lobbying activities by selecting **Yes** or **No** from the drop-down menu.



If No, proceed to Step 25 below.

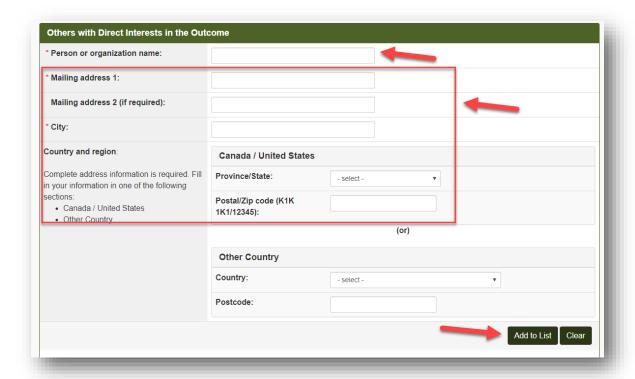
If Yes, continue with the following steps:

i) If you select Yes, click "Add/Edit Other Direct Interests".

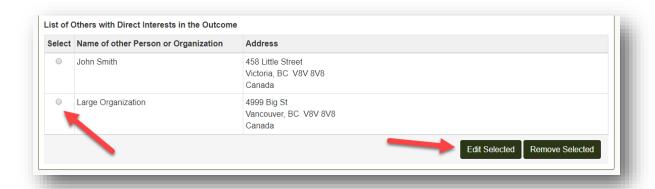


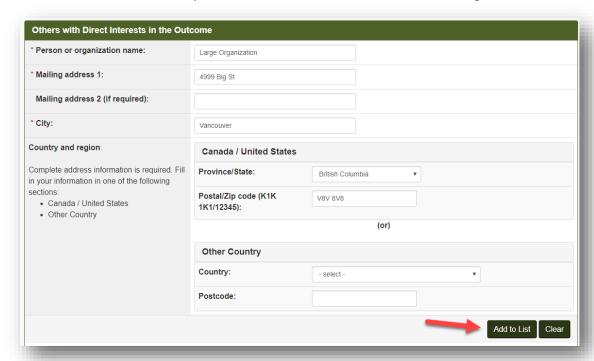
ii) Enter the **person or organization name** and **business mailing address**. Click "Add to List".

If the person or organization is outside of Canada and the United States, fill out the "Other Country" section.



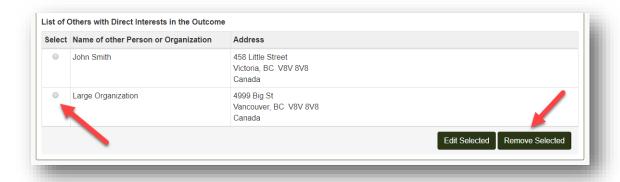
- iii) Information about the other persons or organizations you add in this section will be shown near the bottom of the screen. To add another person or organization, repeat the process shown above.
- iv) To edit an entry, select the radio button for that entry and click "Edit Selected".



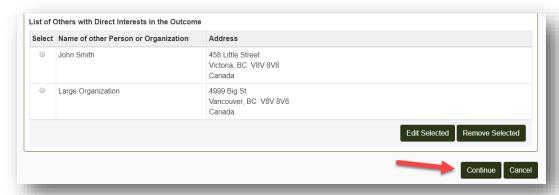


When the details have been updated, click "Add to List" to save the changes.

v) If you entered information in error, delete it by **selecting the radio button** and clicking "**Remove Selected**".

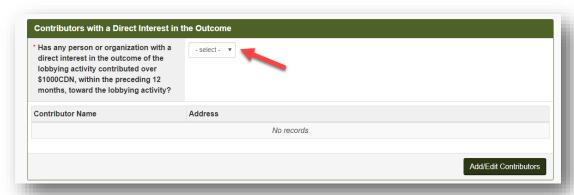


vi) When the list is complete and accurate, click "Continue".



# Contributors with a direct interest in the outcome

25. Declare whether any person or organization with a direct interest in the outcome of the lobbying activity has contributed over \$1,000 CDN toward the lobbying activities **in the past 12 months** by selecting **Yes** or **No** from the drop-down menu.



If No, proceed to Step 26 below.

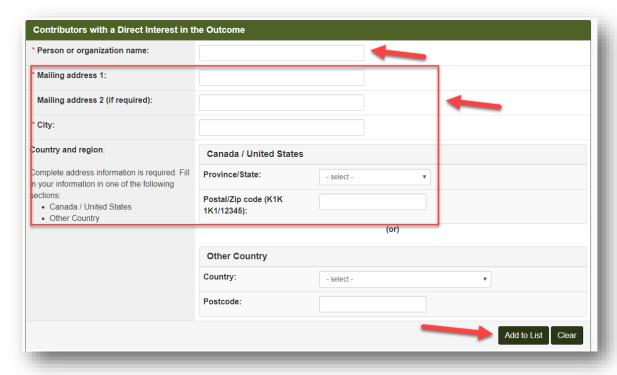
If Yes, continue with the following steps:

i) If you select **Yes**, click on "Add/Edit Contributor".

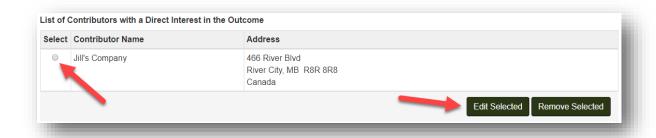


ii) Enter the **person or organization name** and **business mailing address**. Then click "Add to List".

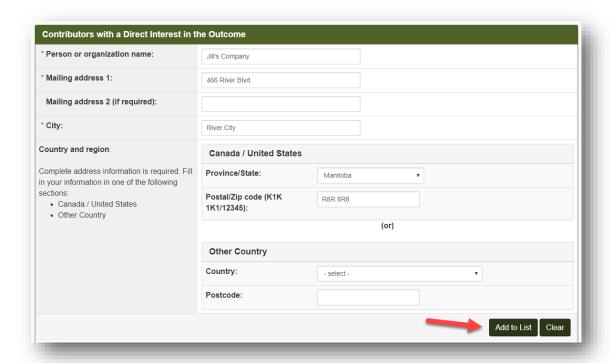
If the contributor is outside of Canada and the United States, fill out the "Other Country" section.



- iii) The contributor will be shown near the bottom of the screen. To add another contributor, repeat the process shown above.
- iv) To edit a contributor, **select the radio button** and click "**Edit Selected**".



When the details have been updated, click "Add to List" to save the changes.



v) If you entered a contributor in error, or if that contributor has not contributed within the past 12 months, delete the person or organization by **selecting the radio button** and clicking "**Remove Selected**".



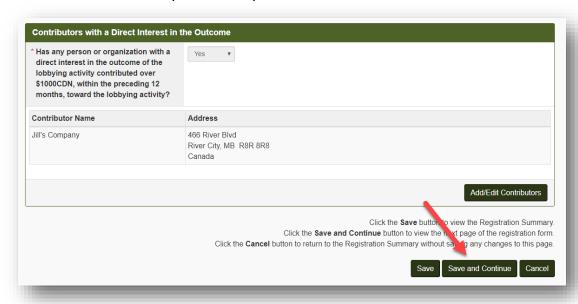
vi) When the list of contributors is complete and accurate, click "Continue".



### Save information

26. When all information on Step 4 of 7 is complete, click "Save and Continue" to continue to the next section of the Registration Return.

If you wish to save and finish later, click the "Save" link instead. That takes you back to the Consultant Lobbyist Summary screen.

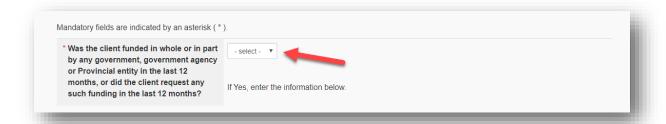


Step 5 of 7: Government funding information

## Government funding

27. Declare whether your client received funding, or requested funding, from any government, government agency or Provincial entity in the last 12 months by selecting Yes or No from the drop-down menu.

For more information see ORL guidance on <u>Government Funding</u> and <u>How To Report</u> Government Funding in the Lobbyists Registry.



If No, proceed to Step 28 below.

If Yes, continue with the following steps:

i) Select "Add New".



ii) Enter a **BC Government, government agency or Provincial entity name** by selecting it from the **drop-down list**.

If the client requested or received funding from **another level of government**, type the name in the **other government institution** field.



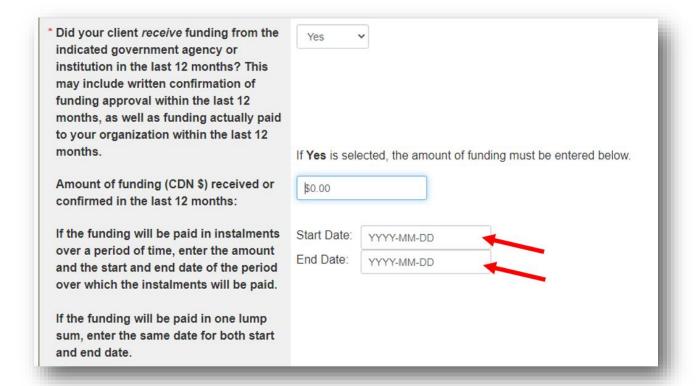
iii) State whether the client <u>received</u> funding from the government agency within the past 12 months by selecting **Yes** or **No**. Funding 'received' may include written confirmation of funding approval within the last 12 months and/or funding paid to the organization within the last 12 months.



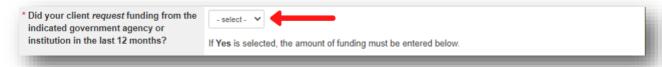
If Yes, enter the amount of funding **received** within the last 12 months.

If you are declaring the total amount of funding received over a period of time, enter the start and end date of the funding period.

If you are declaring one-time funding, enter the same date in the start date and end date fields.



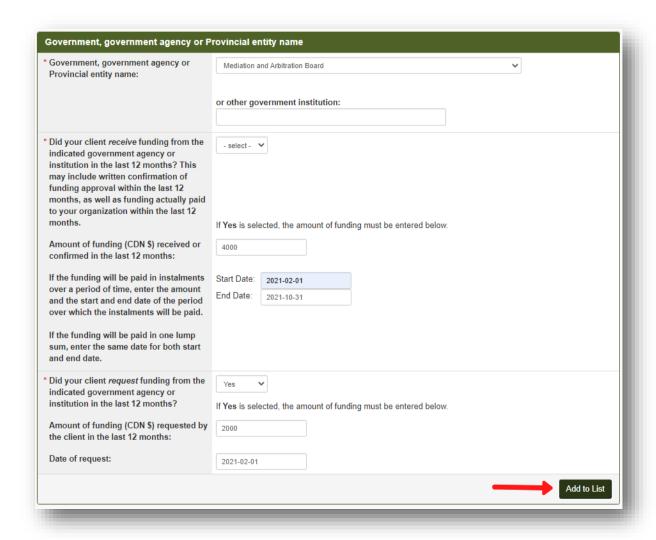
iv) Next, state whether your client <u>requested</u> funding from that government agency within the past 12 months by selecting **Yes** or **No**.



If **Yes**, enter the amount of funding <u>requested</u>, and the **date of the request**.

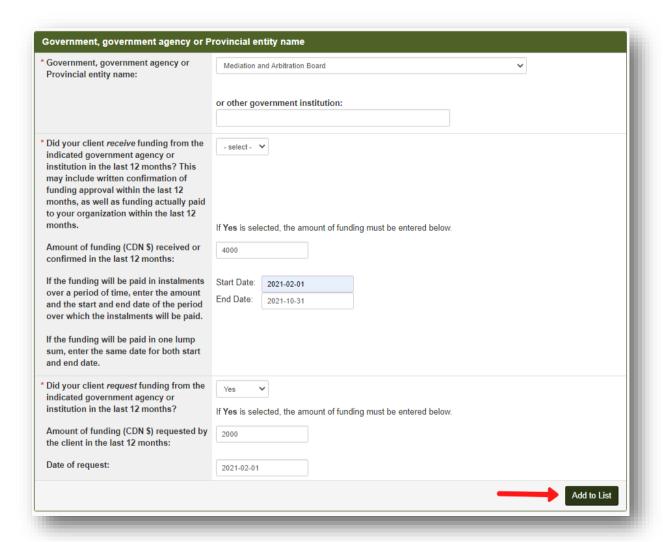


v) Once the details are correct, click on "Add to List".



vi) The list of government funding will be shown near the bottom of the screen (you may need to scroll down). To add government funding from another source, repeat the process shown above.

When the details have been updated, click on "Add to List" to save the changes.



- vii) Working from the List of Government Funding, add funding by clicking "Add New".
- viii) To edit an entry for government funding, click the pencil /eraser icon for that entry.



ix) If you entered that government funding in error, delete the entry by clicking the red trash icon for that entry.



### Save information

28. When all information on Step 5 of 7 is complete, click "Save and Continue" to continue to the next section of the Registration Return.

If you wish to save and finish later, click the "Save" link instead. That takes you back to the Consultant Lobbyist Summary screen.



## Step 6 of 7: Subject Matter of the Lobbying Activities

# Arranging meetings for others

29. Declare whether the lobbyist will be arranging meetings for others with a public office holder for the purpose of lobbying by selecting **Yes** or **No**.



Details, intended outcomes and subject matter of lobbying activities

See GETTING STARTED - REFERENCE GUIDE pages 20 – 22.

30. Enter one **specific topic of lobbying communications** in the text box.

* Specific Topics of Lobbying Communications (see examples regarding content and layout <u>here</u> ):	*

Describe a specific topic about which you are lobbying in concise language.

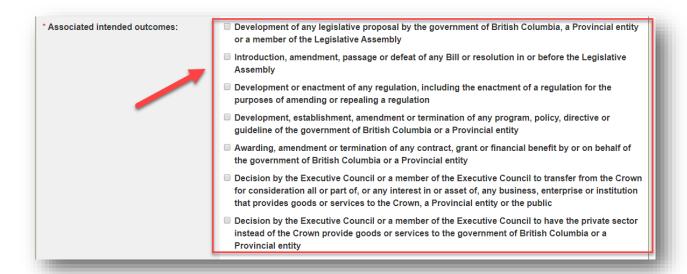
Refer to the government decision, policy area or type of regulation, etc you are seeking to influence or change.

Provide enough detail for the general reader to understand the legislation, government policies or decisions you are seeking to influence.

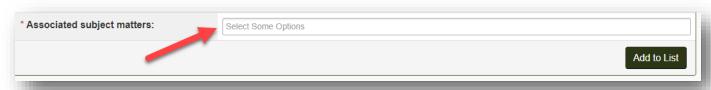
Do not use wording such as "providing information", "educating" or "making the government aware". These do not meet the definition of "lobby" and will not be accepted.

Do not use acronyms or abbreviations unless the meaning will be clear to all readers.

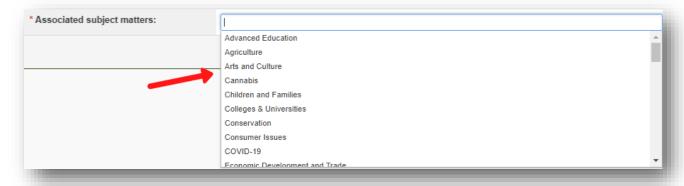
31. Choose the **intended outcomes** of your lobbying activities; select from the **tick boxes**.



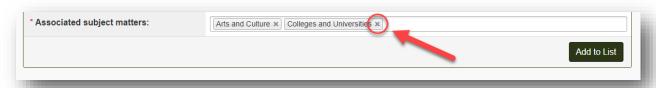
32. Choose the associated subject matters in the box provided.



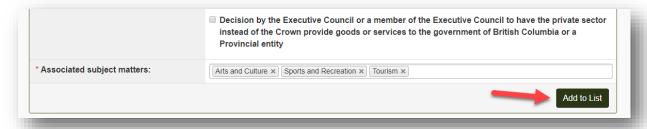
Click the text box to see a drop-down menu of subject matters. Select one or more subject matters from the list that are related to the specific topic you have entered.



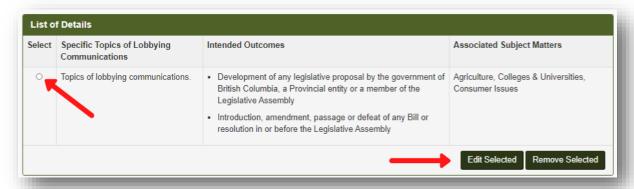
33. If you select a subject matter in error, click the x to remove it.



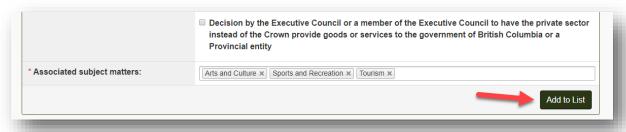
34. When one topic of lobbying communications, the intended outcomes and subject matters for that topic have been recorded, click "Add to List".



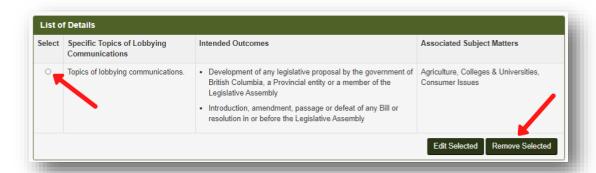
- 35. That Specific Topic of Lobbying Communications will be shown in the List of Details near the bottom of the screen. To add another Specific Topic of Lobbying Communications, repeat the process.
- 36. If you are lobbying about more than one topic, do not enter more than one specific topic of lobbying communication in a single "Specific Topic of Lobbying Communication" entry.
- 37. Enter each Specific Topic of Lobbying Communications, its intended outcomes and subject matters, then click "Add to List" to create a separate row for each topic.
- 38. Work from the List of Details to edit an entry in this section. **Select the radio button** beside the entry and click "**Edit Selected**".



When the details have been updated, click "Add to List" to save the changes.



39. Work from the List of Details to remove an entry in this section. Select the radio button beside the entry and click "Remove Selected".



### Save information

40. When all information on Step 6 of 7 is complete, click "Save and Continue" to continue to the next section of the Registration Return.

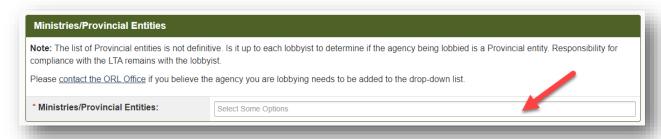
If you wish to save and finish later, click the "Save" link instead. That takes you back to the Consultant Lobbyist Summary screen.



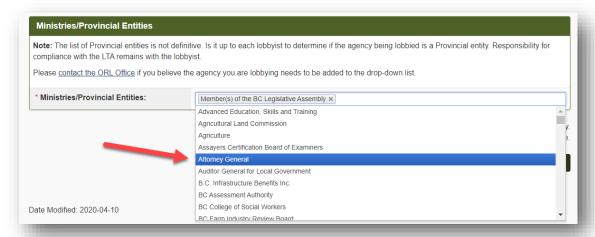
# Step 7 of 7: Public Agencies and Members of the BC Legislative Assembly Information

**Enter Ministries and Provincial Entities** 

41. Select all the Ministries and Provincial Entities you are lobbying.



**Click** the text box to see the list of Public Agencies. Include each Ministry and Provincial Entity you are lobbying.



If lobbying a Member of the Legislative Assembly (MLA) as an MLA, select 'Member(s) of the Legislative Assembly' from the list.

Ministries/Provincial Entities	
Note: The list of Provincial entities is not definitive. Is it up to each lobbyist to determine if the agency being lobbied is a Provincial entity. Responsibility for compliance with the LTA remains with the lobbyist.  Please contact the ORL Office if you believe the agency you are lobbying needs to be added to the drop-down list.	
* Ministries/Provincial Entities:	[Member(s) of the BC Legislative Assembly x ]

If lobbying an MLA in their capacity as a Minister, select the name of the Ministry from the list.

If lobbying a Parliamentary Secretary in their capacity as Parliamentary Secretary, select the relevant entry from the list (e.g. Parliamentary Secretary for Environment).

If lobbying the Premier in their capacity as Premier, select 'Office of the Premier' from the list.

For information about Provincial entities, please see <a href="PROVINCIAL ENTITIES">PROVINCIAL ENTITIES</a> guidance document.

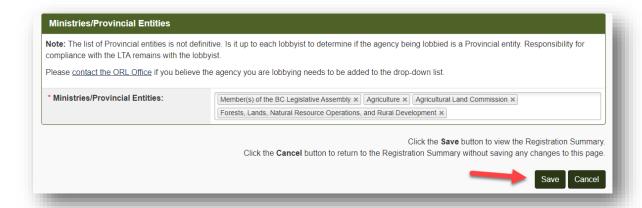
If you do not see an agency on the list that you believe should be there, please contact Registry staff at info@bcorl.ca.

42. If you selected a Ministry or Provincial Entity in error, or are no longer lobbying that public agency, click the **x** to remove it.



## Save information

43. When all information on Step 7 of 7 is complete, click "Save" to go the Consultant Lobbyist Summary screen.



## **Consultant Lobbyist registration summary**

**Review your Registration Return** 

44. **Review the Consultant Lobbyist Summary**. If any information is incomplete/inaccurate, click the "**Edit**" button in the heading of the section to edit that section.

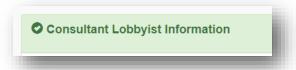


When your updates are complete, click "Save" to be returned to the Consultant Lobbyist Summary screen.

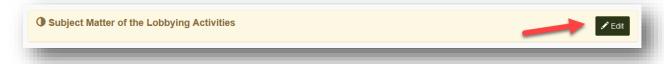


# Certify and submit your Registration Return

You will only be able to submit your registration once all sections are complete. A completed section is indicated in a green heading with a check mark.



Incomplete sections are indicated by a half-circle symbol and a yellow/brown heading. Click the "Edit" button in the heading to complete the information.



45. Once the information in your Consultant Lobbyist Registration Return is complete and accurate, click the "**Proceed to Certification**" button in the lower right of the Consultant Lobbyist Summary screen.



46. Read the three statements and confirm your compliance by ticking the **check boxes**.

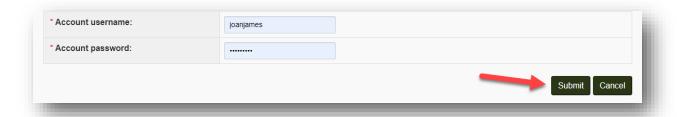


47. Enter the Designated Filer's account username and account password.

**Note:** If you are an Account Representative creating this registration on behalf of a Consultant Lobbyist, you will not be able to submit the registration with your user name and password. Documents can only be submitted to the Registry once the Consultant Lobbyist's username and password are entered.



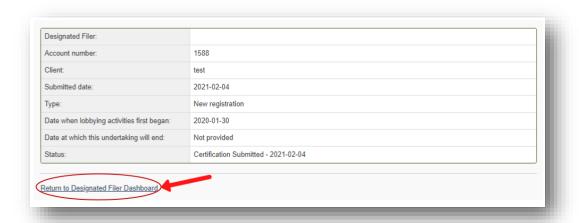
With the Consultant Lobbyist's username and password entered, click "Submit".



48. The Confirmation of Filing screen confirms that you have **successfully submitted** your Registration Return. You will also receive a **confirmation email**.

**Note:** The **Registration Return is now locked** and cannot be updated until Registry staff has either activated it or sent it back to you for updating.

However, you can now **create a Lobbying Activity Report** for this Registration Return. Click the "**Return to Designated Filer Dashboard**" link to return to the Dashboard if you need to create a Lobbying Activity Report. See <u>User Guide - Monthly Reports and Lobbying Activity Reports</u> for more information.

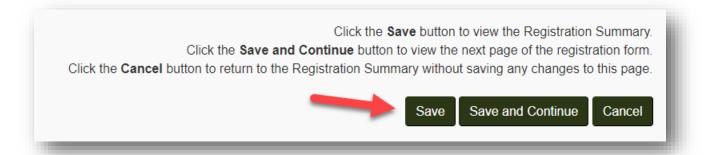


# Other functionality

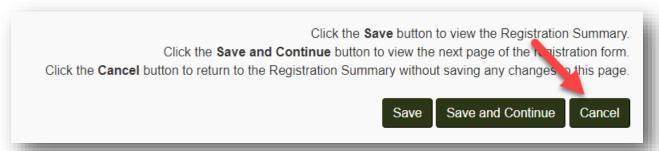
Save and resume a partially completed Registration Return

1. At the end of any step of your Registration Return, you can choose to save and finish later, rather than continuing to the next step.

To do so, click the "Save" button at the end of the step. If all required information has been completed for that step, your information will be saved and you'll be taken to the Consultant Lobbyist Summary screen.



If you are working on a step in your Registration Return and realize you do not have the information to complete the screen, click "Cancel" instead. Completed information from previous screens will not be lost.



Create a new Registration Return by copying details from another lobbyist's registration If another Consultant Lobbyist is lobbying for the same client and they have already created a Registration Return for these lobbying activities, you can copy their registration rather than starting a new one, and then revise as needed.

To do this, you need the **Registration Number** of the existing registration you wish to copy. Registration Numbers are only available once the registration has been reviewed and activated by Registry staff.

1. Locate the **Registration Number** of the Registration Return you wish to copy. You can request the registration number from the other Consultant Lobbyist or you can locate

the registration via a public search.

The number will be two sets of digits separated by a dash: XXXX-XXXX.

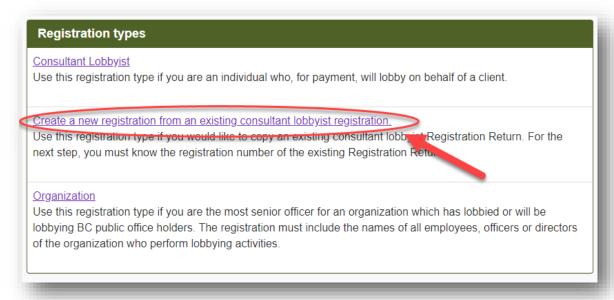
If you see the number displayed XXXX-XXXX-X, the final digit(s) are the version number(s) of the Registration Return. Only record the first two sets of digits for the purpose of copying a registration. Disregard the version number in this case.



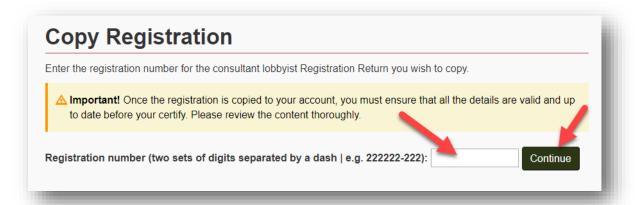
2. On your Designated Filer Dashboard, click the "New Registrations" tab.



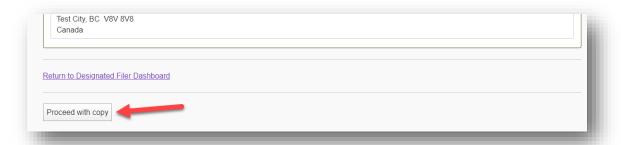
3. Click "Create a new registration from an existing consultant lobbyist registration".



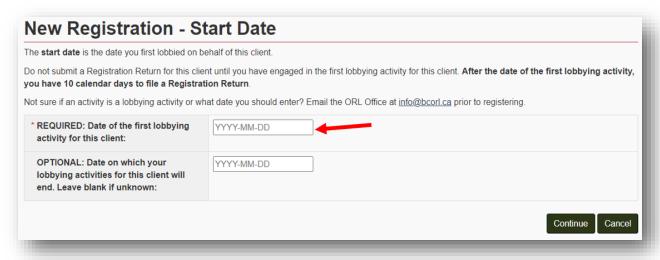
4. Enter the registration number and click "Continue".



5. Review the registration to confirm that it is the correct registration and correct version you wish to copy. Then click on "**Proceed with copy**" in the lower left.



- 6. A copy has now been made for you.
- 7. **Start Date screen**: Enter the date of **your** first lobbying activity for this client. Click Continue.



8. Review the information in the Registration Return carefully and edit as needed.

For instructions to update a Registration Return, see <u>Updating a Consultant Lobbyist</u> <u>Registration Return.</u>

9. When all information in your Registration Return is correct, click "Proceed to Certification" on the bottom right.

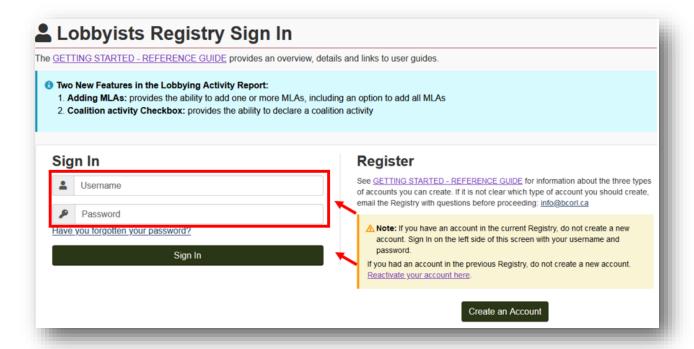
For instructions to certify & submit a Registration Return, see "<u>Certify and submit your Registration Return</u>."



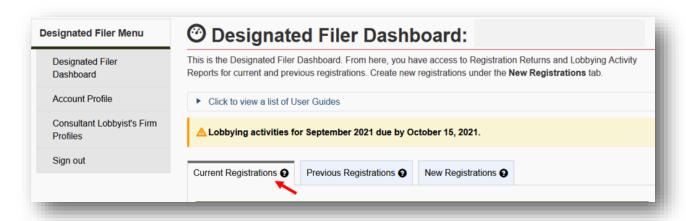
# PRINTING OR SHARING A REGISTRATION RETURN

## **Print your Registration Return**

 Go to the Lobbyists Registry sign-in page <a href="https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn">https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn</a> and Sign in to your account.

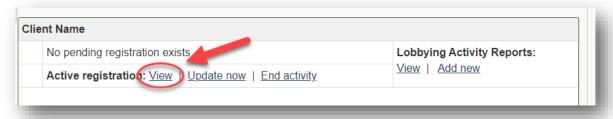


2. Once signed in you'll be on the Designated Filer Dashboard. Make sure you are on the "Current Registrations" tab.



3. Location the Registration Return you wish to print and click "View".

Note that if the current version of your registration is pending review by the Registry staff, it cannot be opened for printing. Wait for Registry staff to approve your registration and try again.



4. Once the Registration Return is loaded on the screen, use your browser's print functionality. Usually this can be accessed via File > Print, by CTRL+P or by right-clicking and selecting "Print".

The Lobbyists Registry will print your entire registration in one document.

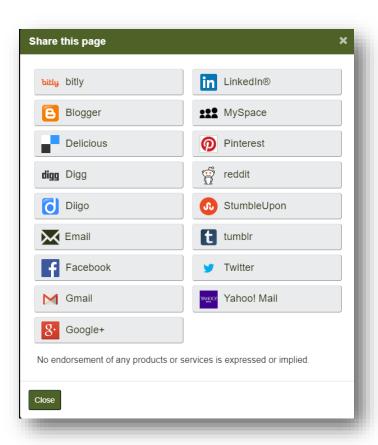
# **Share your Registration Return**

You can share your Registration Return via email or a variety of social media options.

- 1. Locate and open your Registration Return as described above in the <u>printing section</u>.
- 2. Near the upper right of your registration, click "Share this page".



3. Click on the desired method of sharing.



# UPDATING A CONSULTANT LOBBYIST REGISTRATION RETURN

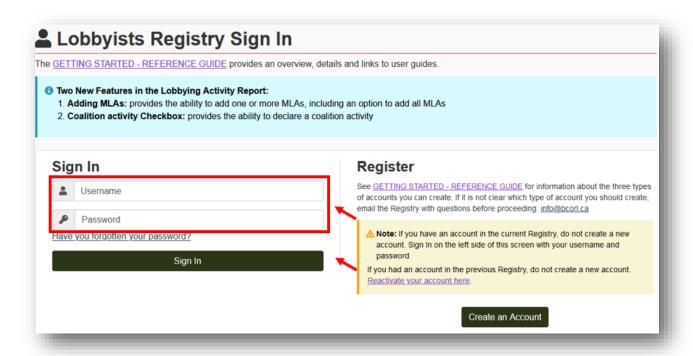
### Notes:

- If you start an update but have yet to certify & submit it to the Registry for activation, there will be a link beside the "Pending Registration Return" to click when you are ready to complete the update and submit the changes to the Registry.
- Once you certify & submit a Registration Return, it is locked until it's been reviewed by Registry staff. Registry staff will either activate your registration or send it back for revisions. In either case, you will then be able to edit the Registration Return again.

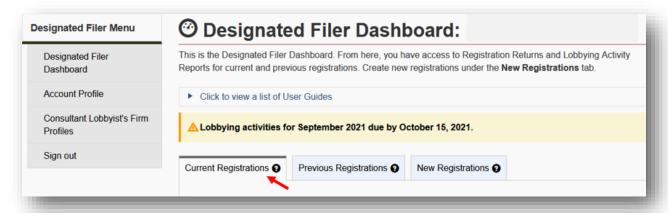
# Update your Registration Return and re-submit when changes occur

You are required to keep your Registration Return up to date. If any of the information in your Registration Return has changed, update your Registration Return and re-submit it to the Registry by the 15th of the month following the month in which the change occurred.

- Go to the Lobbyists Registry sign-in page https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn
- 2. Sign in to your account.



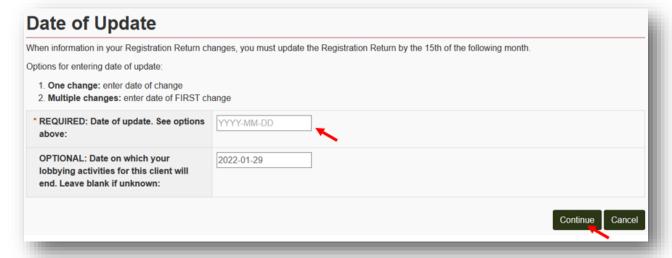
Make sure the "Current Registrations" tab is selected on the Designated Filer Dashboard.



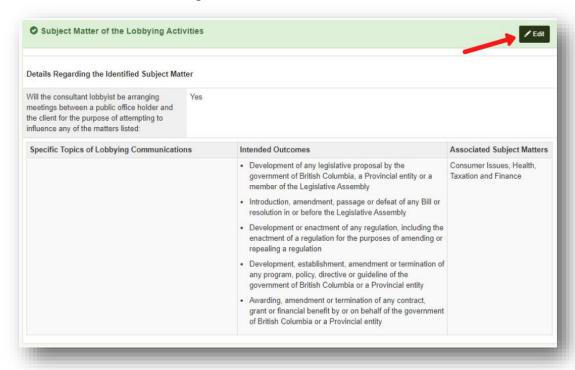
4. Locate the Registration Return to be updated. Click the appropriate link (see explanation of links under the heading **Status of Registration Returns under the Current Registrations Tab** near the beginning of this user guide).



5. **On the Date screen:** enter the date the information changed. If more than one item of information changed, enter the date of the first change. Then click "**Continue**".



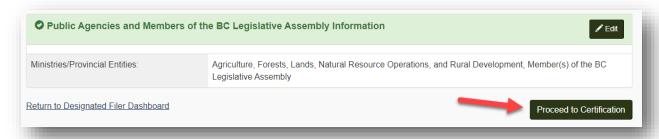
6. On the Consultant Lobbyist Summary screen, find the section that needs updating and click "Edit" in the heading of that section.



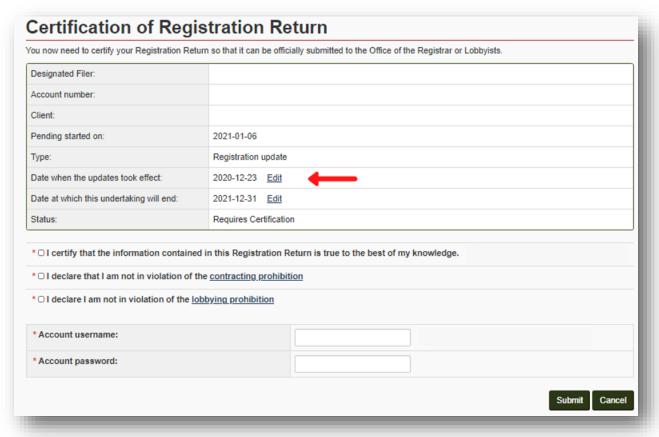
7. Enter the changes, then click "Save" (to return to the Consultant Lobbyist Summary screen) or "Save and Continue" to move to the next step of the Registration Return.



8. Once all updates to the Registration Return are complete, submit the changes to the Registry by clicking "**Proceed to Certification**".



9. Check that you entered the correct date that the change occurred. If not, click "Edit" beside the date to revise, then "Continue" to return to the Summary screen, then click "Proceed to Certification" again.

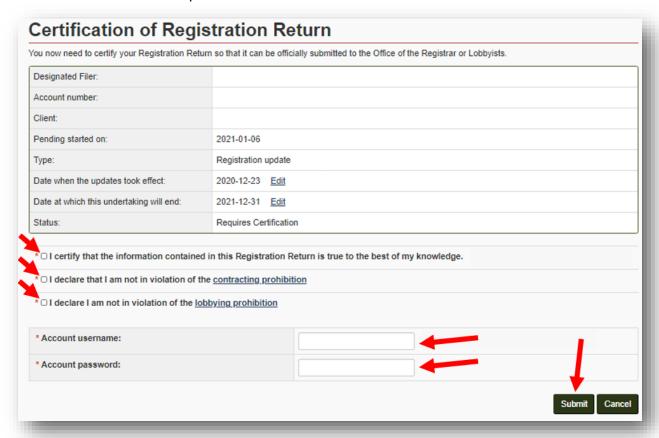


10. Certify & confirm compliance by ticking the check boxes.

Enter your **Designated Filer's Account username** and **Account password** and click on "**Submit**".

**Note:** The Consultant Lobbyist is the Designated Filer. **If you are an Account Representative** who is updating this registration on behalf of a Consultant Lobbyist, you

will not be able to submit the updated registration with your user name and password. The updated registration can only be submitted to the Registry after the Designated Filer's username and password are entered.



# TIP: to Change an answer in your Registration Return from yes to no

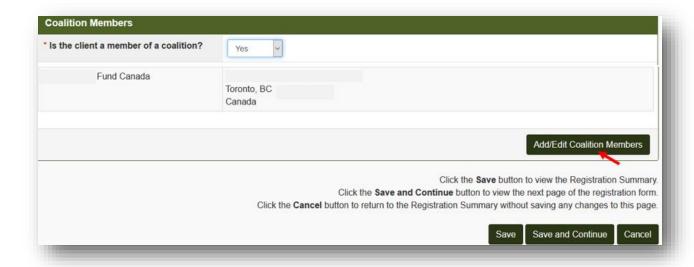
This tip applies to the following information in your Registration Return:

- Step 1: Former public office holder positions in BC
- Step 1: Relevant codes of conduct
- Step 3: Members of a coalition
- Step 4: Affiliates with a direct interest in the outcome
- Step 4: Others with a direct interest in the outcome
- Step 4: Contributors with a direct interest in the outcome
- Step 5: Government funding

If you previously declared "yes" to questions about these items of information, and entered the details, you will not be able to change your answer to "no" until you remove the details. You must delete the details first, before you can change your answer to 'no'.

1. Locate the information you need to change. To illustrate how to change an answer from "yes" to "no" we have used the Coalition section.

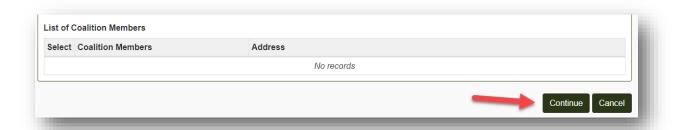
Locate the table of details you previously entered, such as such as coalition members information. Click the "Add/Edit" button.



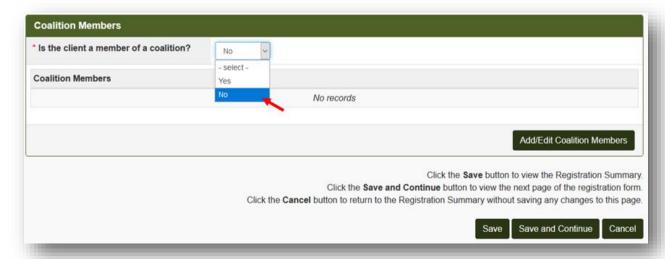
- 2. Select the radio button beside the information and click "Remove Selected".
- 3. Repeat this process for each entry/item of information to be removed.



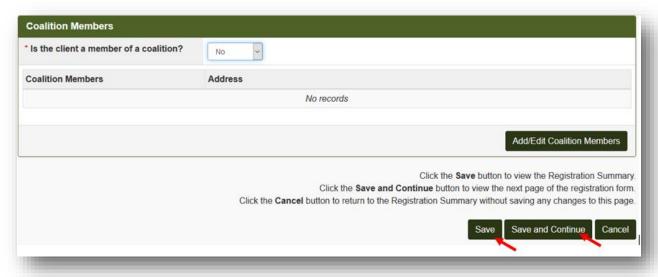
4. When the table of details is empty, click "Continue".



5. You can now change the answer to the question to "No".



6. Make sure you click "Save" (or "Save and Continue") at the bottom of the screen to save the update.



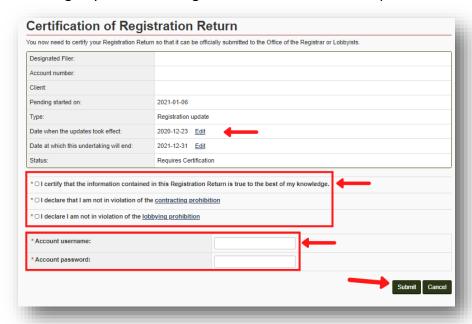
7. Certify and submit your changes.



Certify & confirm compliance by ticking the check boxes.

Enter your **Designated Filer's Account username** and **Account password** and click on "Submit".

**Note:** The Consultant Lobbyist is the Designated Filer. **If you are an Account Representative** updating this registration on behalf of a Consultant Lobbyist, you will not be able to submit the updated registration with your user name and password. The updated registration can only be submitted to the Registry after the Designated Filer's username and password are entered.



### TIP: Registration Return sent back to you for revisions/notes from Registry Staff

If your Registration Return is sent back to you for revisions, Registry staff entered notes in one or more sections of your Registration Return. You may receive more details in an email from a Registry officer.

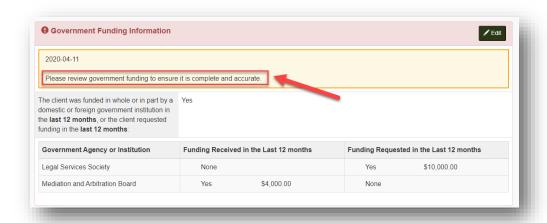
1. On the Designated Filer Dashboard, under the Current Registrations tab, you will see the Registration Return with the link: "Correction required" or "Corrections overdue".



2. Click on "Correction required" or "Corrections overdue" link.



3. Scroll through your Registration Return. The sections where corrections are required will be indicated with a red symbol. There will also be a note included from Registry staff. Refer to the note or email from Registry staff for details of actions required.



4. Click the "Edit" button in the heading to enter corrections/updates.



5. Once the corrections/updates are complete, click "Save" or "Save and Continue" at the bottom of the screen.



6. If no other sections require updates, scroll to the bottom and click "Proceed to Certification" to submit your changes to the Registry.

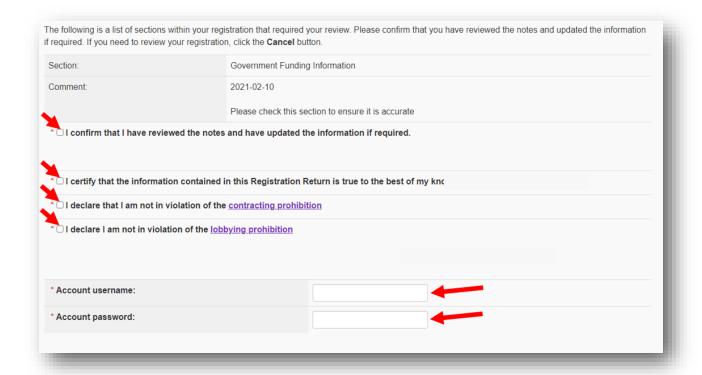


Confirm you reviewed the notes and updated the information (tick the **check box**).

Certify & confirm compliance by ticking the check boxes.

Enter your **Designated Filer's Account username** and **Account password** and click on "Submit".

**Note:** The Consultant Lobbyist is the Designated Filer. **If you are an Account Representative** updating this registration on behalf of a Consultant Lobbyist, you will not be able to submit the updated registration with your user name and password. The updated registration can only be submitted to the Registry after the Designated Filer's username and password are entered.



## PREVIOUS VERSIONS OF YOUR REGISTRATION RETURN

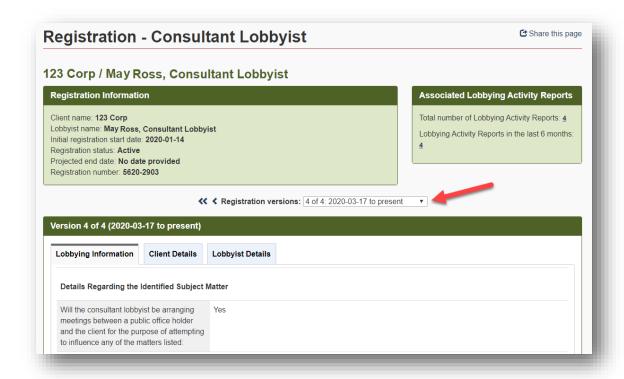
A new public version of your Registration Return is created each time you submit updates to the Registry and those updates are activated by Registry staff.

The updated version is not visible to the public until Registry staff have activated it.

The current activated version, and all previous activated versions, are visible to you and the public.

## View a previous version of your Registration Return

- You can view previous versions in the Registry without logging in. From the <u>Lobbyists</u>
   <u>Registry landing page</u>, under Registry Search Tools, choose "Advanced Registry Search"
  to complete a search.
- 2. If you want to view previous versions when you are logged in: from your Designated Filer Dashboard, find the Active Registration Return and click "View".
- Click the Registration versions drop-down menu to select a previous version of the Registration Return. Versions are shown in a "7 of 8" format with the date range for each version beside it.



# **END, RE-ACTIVATE OR DELETE A REGISTRATION RETURN**

## **End a Registration Return manually**

If your undertaking to lobby for a client has ended, you must end the Registration Return within 30 days. If lobbying activity for a client has ended temporarily, you have the option to inactivate your Registration Return for the time being.

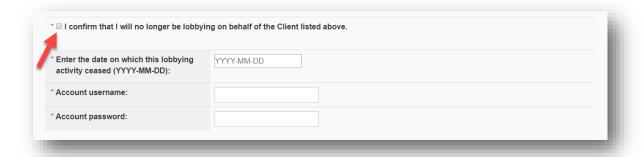
- 1. Go to the Lobbyists Registry sign-in page https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn
- 2. Sign in with your user name & password.



3. On the Designated Filer Dashboard, work under the "Current Registrations" tab. Find the Registration Return and click "End registration".



4. Read the notes on the new screen and if appropriate, confirm that you will no longer be lobbying on behalf of the client by checking the **tick box**.



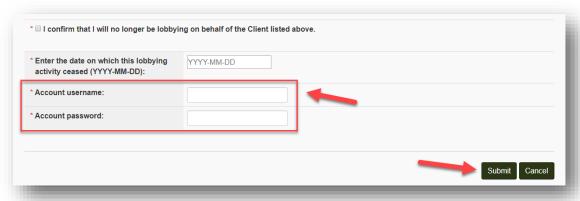
5. Enter the **date** on which the lobbying activity ceased.

**Note:** You may only enter today's date and previous dates. If you have not yet ceased lobbying for this client, wait until your lobbying is complete before manually inactivating your Registration Return. Alternative: to enter a date in the future you must follow the instructions to **End a Registration Return by setting a future end date** (next section).

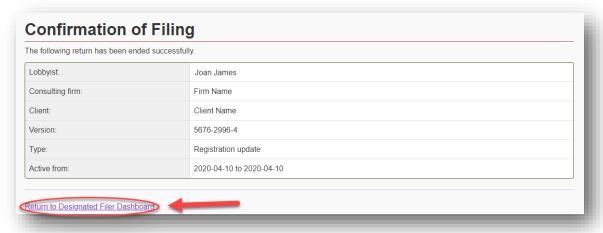


6. Enter the **Designated Filer's Account username** and **Account password** and click on "**Submit**".

**Note:** The Consultant Lobbyist is the Designated Filer. **If you are an Account Representative** updating this registration on behalf of a Consultant Lobbyist, you will not be able to submit the updated registration with your user name and password. The updated registration can only be submitted to the Registry after the Designated Filer's username and password are entered.



7. The next screen confirms that you have successfully ended your Registration Return. You can now either **Sign out** or click on "**Return to Designated Filer Dashboard**".



### End a Registration Return by setting a future end date

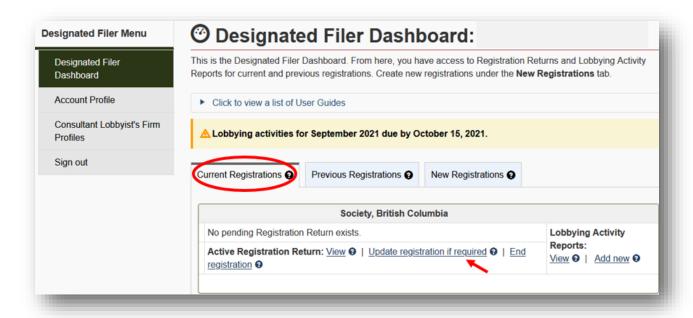
If you enter the date on which your lobbying activities for a client will end, the system will automatically de-activate your Registration Return on that date.

#### To set a future end date:

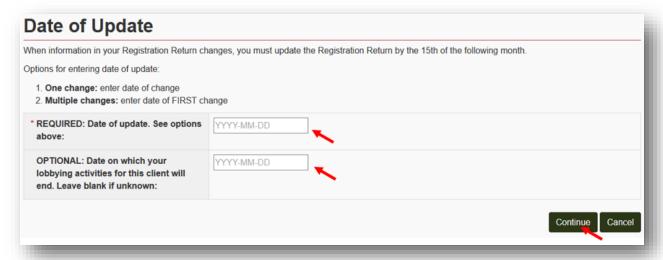
- Go to the Lobbyists Registry sign-in page https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn
- 2. **Sign in** with your user name & password.



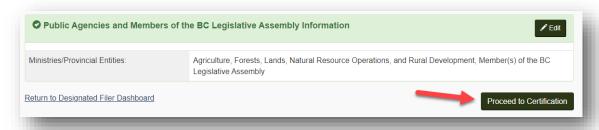
- 3. On the Designated Filer Dashboard, work under the "Current Registrations" tab.
- 4. Locate the Registration Return and click "Update registration if required" or "Incomplete" or "Requires certification", as appropriate.



5. **Date screen**: Enter today's date in the box for **Date of update**. Below that, in the box for **Date on which your lobbying activities for this client will end**, enter the date on which the undertaking and/or the lobbying for this client will end.



6. Scroll to the bottom of the Consultant Lobbyist Summary screen and click "**Proceed to Certification**".



7. Confirm your compliance by ticking the check boxes.

Enter the **Designated Filer's Account username** and **Account password** and click on "**Submit**".

**Note:** The Consultant Lobbyist is the Designated Filer. **If you are an Account Representative** updating this registration on behalf of a Consultant Lobbyist, you will not be able to submit the updated registration with your user name and password. The updated registration can only be submitted to the Registry after the Designated Filer's username and password are entered.

8. You will receive confirmation of filing. The Registry system will automatically de-activate your Registration Return on the date you entered in the box for **Date on which your lobbying activities for this client will end**. The Registration Return can be re-activated if/when you resume lobbying for this client.

## **Re-activate a Registration Return**

If you resume lobbying activities while your Registration Return for the client is inactive, you must re-activate the Registration Return within 10 days after resuming lobbying activities.

- 1. Go to the Lobbyists Registry sign-in page https://www.lobbyistsregistrar.bc.ca/app/secure/orl/lrs/do/lgn
- 2. **Sign in** with your user name & password.



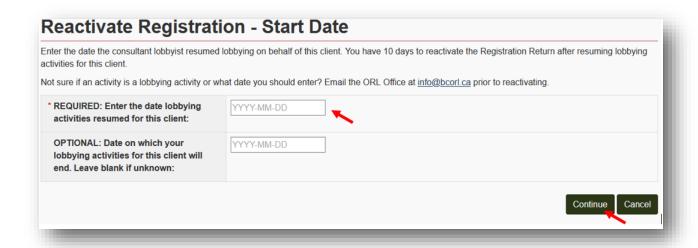
3. Once signed in, you'll be on the Designated Filer Dashboard. Click the "Previous Registrations" tab.



4. Locate the Registration Return you need to re-activate and click "Reactivate".



5. Reactivate Registration - Start Date: on the date screen, enter the date lobbying activities resumed for this client. Click "Continue".



6. Review the Registration Return and enter updates as needed. See "<u>Update your</u> Registration Return and re-submit when changes occur".

**Note:** If your Registration Return has been inactive for over 12 months you may need to reenter much of the information. If the heading of a section indicates it is incomplete , you must update it in order to proceed. Click "**Edit**" to enter information in that section.



7. Once all updates are complete, submit the changes. Click "Proceed to Certification".



8. Confirm your compliance by ticking the check boxes.

Enter the **Designated Filer's Account username** and **Account password** and click on "Submit".

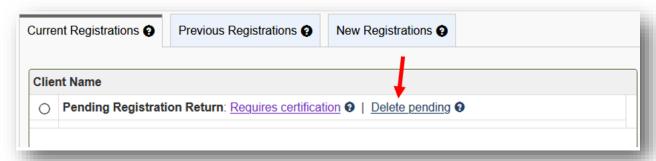
**Note:** The Consultant Lobbyist is the Designated Filer. **If you are an Account Representative** updating this registration on behalf of a Consultant Lobbyist, you will not be able to submit the updated registration with your user name and password. The updated registration can only be submitted to the Registry after the Designated Filer's username and password are entered.

### Delete a New Registration Return / Delete Recent Updates Made to your Registration Return

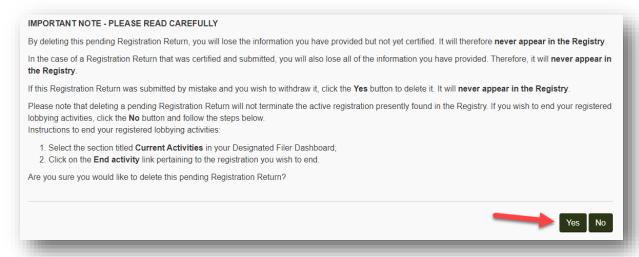
You can delete a new Registration Return that has been submitted but not yet activated by Registry staff. You can also delete updates to an existing Registration Return prior to activation of the updates by Registry staff. You cannot delete a version that has been activated.

**Note:** If your Registration Return or updates to your Registration Return were submitted in error and have already been activated, contact Registry staff at info@bcorl.ca.

To delete a version of your Registration Return that has not yet been activated, locate
the Registration Return under the Current Activities tab of your Designated Filer
Dashboard and click "Delete pending".



2. Read the important note carefully. If you are sure you wish to delete this version of the Registration Return, click "Yes".



3. You will be returned to the Designated Filer Dashboard. If you delete updates to a previously activated Registration Return, the Registration Return shown on your dashboard will be the most recent activated version.

## **GETTING HELP**

## **Lobbyists Transparency Act and Frequently Asked Questions**

<u>Getting Started – Reference Guide</u> (very helpful overview)

<u>Lobbyists Transparency Act (LTA)</u>

LTA Guidance Documents

**Frequently Asked Questions** 

### **Full Length User Guides**

- User Guide Account Management
- User Guide Accounts and Registrations from the Previous Lobbyists Registry
- User Guide Consultant Lobbyist Registration Returns
- User Guide Organization Registration Returns
- User Guide Monthly Returns and Lobbying Activity Reports

## **Quick User Guides**

- Quick Reference Guide for Consultant Lobbyists
- Quick Reference Guide for Organizations
- Quick Reference Guide for Representatives

## **Contacting Registry Staff**

If you are unable to complete your Registration Return, send us an email at info@bcorl.ca

Describe the steps you followed and the problem you have encountered. Include any relevant screen captures to help us understand your issue. Also include a **phone number** we can call if needed.