



Registration Transfers

This job aid will outline the steps necessary to perform the below operations:

1. Transfer or accept a Lobbying Disclosure Registration

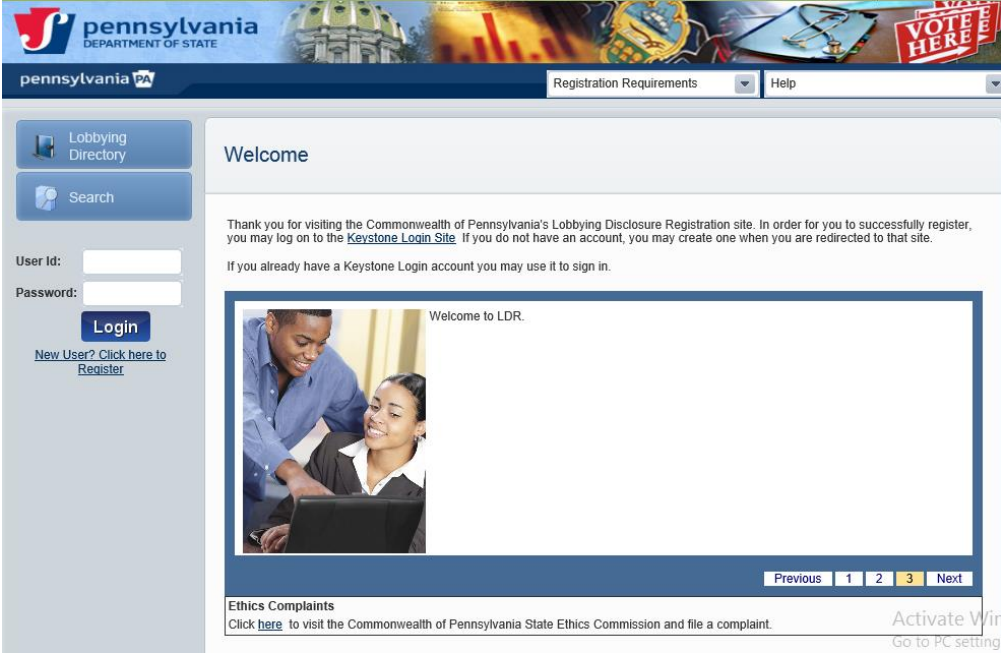
You may encounter the following scenarios related to this process:


- Scenario A: Registration Transfers
- Scenario B: Accepting a Registration Transfer

Each of these scenarios are addressed on the following pages:

- Scenario A: page 1
- Scenario B: page 7

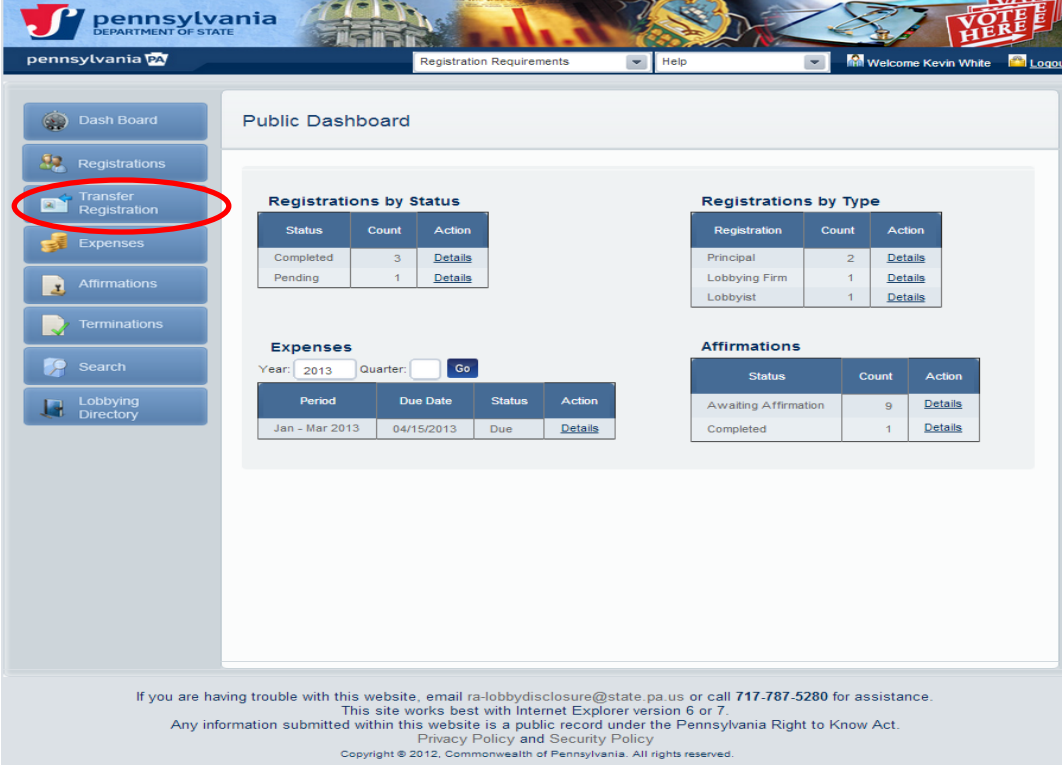
Scenario A: Registration Transfers

Steps	Actions
<p>1.</p>	<p>Access the Lobbying Disclosure Registration (LDR) Website: Enter www.palobbyingservices.pa.gov in your internet browser's address line.</p> 

Steps	Actions																																						
<p>2.</p>	<p>Log In: Enter your Keystone Login account credentials and click [Login].</p> <div data-bbox="657 527 1070 850" style="border: 1px solid #ccc; padding: 10px; margin: 10px auto; width: fit-content;"> <p>User Id: <input type="text"/></p> <p>Password: <input type="password"/></p> <p style="text-align: center;">Login</p> <p style="text-align: center;">New User? Click here to Register</p> </div> <p>The user is presented with the Public Dashboard which displays the user's Number of Registrations by Status, Number of Registrations by Type, any Expense reports which are late or due as well as the status of any Affirmations.</p> <div data-bbox="246 989 1479 1787" style="border: 1px solid #ccc; padding: 10px; margin: 10px auto;">  <p>The screenshot shows the 'Public Dashboard' with a navigation sidebar on the left and four main data sections: Registrations by Status, Registrations by Type, Expenses, and Affirmations.</p> <table border="1" data-bbox="542 1346 808 1476"> <caption>Registrations by Status</caption> <thead> <tr> <th>Status</th> <th>Count</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Completed</td> <td>3</td> <td>Details</td> </tr> <tr> <td>Pending</td> <td>1</td> <td>Details</td> </tr> </tbody> </table> <table border="1" data-bbox="1040 1346 1328 1507"> <caption>Registrations by Type</caption> <thead> <tr> <th>Registration</th> <th>Count</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Principal</td> <td>2</td> <td>Details</td> </tr> <tr> <td>Lobbying Firm</td> <td>1</td> <td>Details</td> </tr> <tr> <td>Lobbyist</td> <td>1</td> <td>Details</td> </tr> </tbody> </table> <p>Expenses</p> <p>Year: <input type="text" value="2013"/> Quarter: <input type="text"/> <input type="button" value="Go"/></p> <table border="1" data-bbox="542 1633 954 1728"> <thead> <tr> <th>Period</th> <th>Due Date</th> <th>Status</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Jan - Mar 2013</td> <td>04/15/2013</td> <td>Due</td> <td>Details</td> </tr> </tbody> </table> <table border="1" data-bbox="1040 1591 1372 1732"> <caption>Affirmations</caption> <thead> <tr> <th>Status</th> <th>Count</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Awaiting Affirmation</td> <td>9</td> <td>Details</td> </tr> <tr> <td>Completed</td> <td>1</td> <td>Details</td> </tr> </tbody> </table> </div>	Status	Count	Action	Completed	3	Details	Pending	1	Details	Registration	Count	Action	Principal	2	Details	Lobbying Firm	1	Details	Lobbyist	1	Details	Period	Due Date	Status	Action	Jan - Mar 2013	04/15/2013	Due	Details	Status	Count	Action	Awaiting Affirmation	9	Details	Completed	1	Details
Status	Count	Action																																					
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Steps	Actions
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3. Access the *Transfer Registration* page:
 Select **Transfer Registrations** from the left navigation.



Registrations by Status

Status	Count	Action
Completed	3	Details
Pending	1	Details

Registrations by Type

Registration	Count	Action
Principal	2	Details
Lobbying Firm	1	Details
Lobbyist	1	Details

Expenses


Year: Quarter:


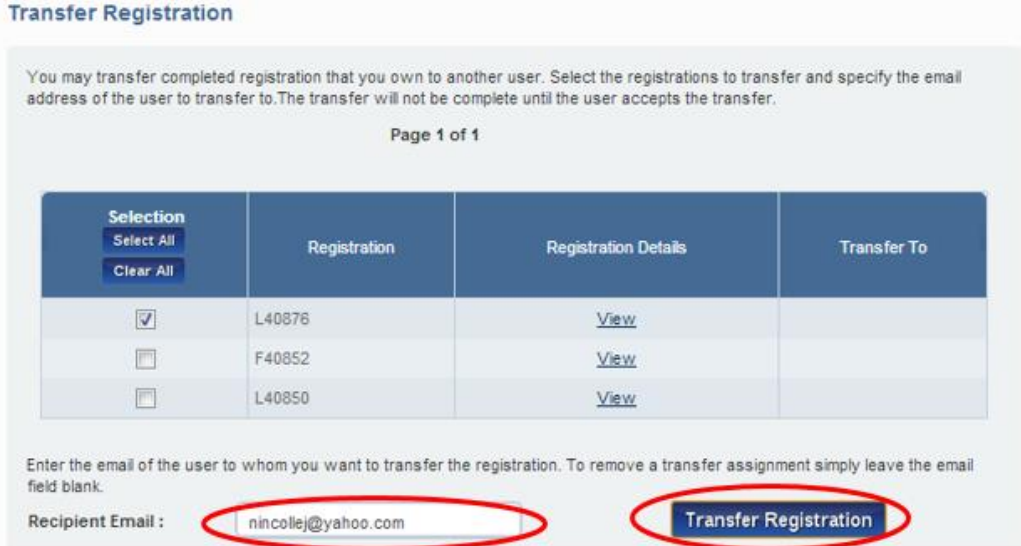
Period	Due Date	Status	Action
Jan - Mar 2013	04/15/2013	Due	Details

Affirmations

Status	Count	Action
Awaiting Affirmation	9	Details
Completed	1	Details

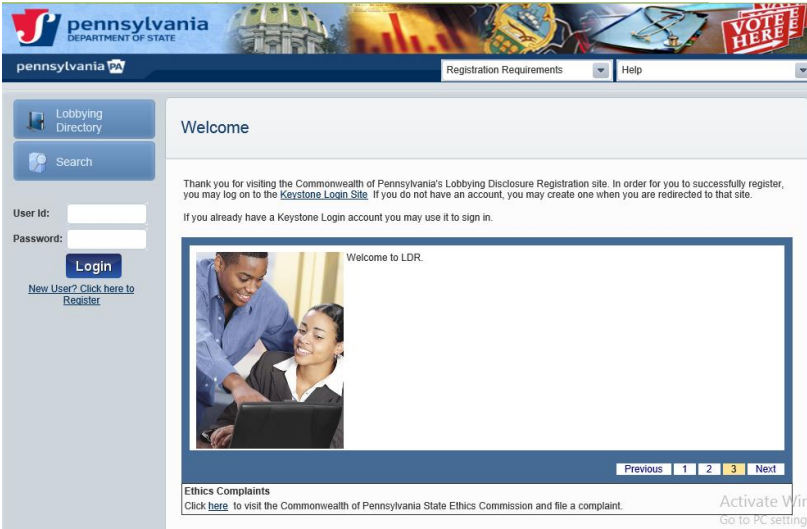
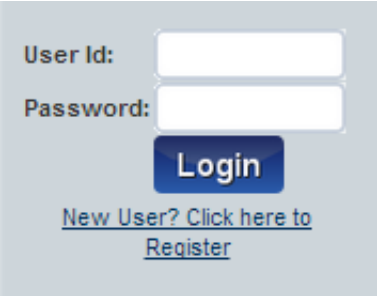
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Steps	Actions																								
	<p>The Transfer Registrations page is displayed:</p> <div data-bbox="289 512 1432 1356" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;">  Transfer Registration </div> <div style="padding: 5px 0;"> <p>Transfer Registration</p> <p>You may transfer completed registration that you own to another user. Select the registrations to transfer and specify the email address of the user to transfer to. The transfer will not be complete until the user accepts the transfer.</p> <p style="text-align: center;">Page 1 of 1</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #2c5e8c; color: white;"> <th style="width: 15%;">Selection</th> <th style="width: 25%;">Registration</th> <th style="width: 30%;">Registration Details</th> <th style="width: 30%;">Transfer To</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;"> <input type="checkbox"/> <small>Select All</small> <small>Clear All</small> </td> <td>L40876</td> <td style="text-align: center;">View</td> <td></td> </tr> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td>F40852</td> <td style="text-align: center;">View</td> <td></td> </tr> <tr> <td style="text-align: center;"><input type="checkbox"/></td> <td>L40850</td> <td style="text-align: center;">View</td> <td></td> </tr> </tbody> </table> <p style="font-size: small; margin-top: 10px;">Enter the email of the user to whom you want to transfer the registration. To remove a transfer assignment simply leave the email field blank.</p> <p>Recipient Email : <input style="width: 150px;" type="text"/> Transfer Registration</p> </div> <div style="padding: 5px 0; margin-top: 10px;"> <p>Accept Transfer Registration</p> <p>You may take ownership of registrations that have been assigned to be transferred to you by another user.</p> <p style="text-align: center;">Page 1 of 1</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #2c5e8c; color: white;"> <th style="width: 15%;">Action</th> <th style="width: 25%;">Registration</th> <th style="width: 30%;">Registration Details</th> <th style="width: 30%;">Transfer From</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">Accept Reject</td> <td>P40844</td> <td style="text-align: center;">View</td> <td></td> </tr> </tbody> </table> </div> </div>	Selection	Registration	Registration Details	Transfer To	<input type="checkbox"/> <small>Select All</small> <small>Clear All</small>	L40876	View		<input type="checkbox"/>	F40852	View		<input type="checkbox"/>	L40850	View		Action	Registration	Registration Details	Transfer From	Accept Reject	P40844	View	
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<input type="checkbox"/>	L40850	View																							
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Accept Reject	P40844	View																							

Steps	Actions																
<p>4. Select the Registration to be Transferred:</p> <p>From the upper 'Transfer Registration' grid, select the registration(s) to be transferred by selecting the check box in the 'Selection' column.</p>	 <p>Transfer Registration</p> <p>You may transfer completed registration that you own to another user. Select the registrations to transfer and specify the email address of the user to transfer to. The transfer will not be complete until the user accepts the transfer.</p> <p>Page 1 of 1</p> <table border="1"> <thead> <tr> <th>Selection</th> <th>Registration</th> <th>Registration Details</th> <th>Transfer To</th> </tr> </thead> <tbody> <tr> <td>Select All Clear All <input checked="" type="checkbox"/></td> <td>L40876</td> <td>View</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>F40852</td> <td>View</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>L40850</td> <td>View</td> <td></td> </tr> </tbody> </table>	Selection	Registration	Registration Details	Transfer To	Select All Clear All <input checked="" type="checkbox"/>	L40876	View		<input type="checkbox"/>	F40852	View		<input type="checkbox"/>	L40850	View	
Selection	Registration	Registration Details	Transfer To														
Select All Clear All <input checked="" type="checkbox"/>	L40876	View															
<input type="checkbox"/>	F40852	View															
<input type="checkbox"/>	L40850	View															
<p>5. Enter the Email Address to Whom the Registration will be Transferred.</p> <p>After selecting the registrations to be transferred, the user will enter the email address of the owner to whom they wish to transfer the registrations and click [Transfer Registration].</p> <p>Please note, this email address must be an address already registered with Keystone Login.</p>	 <p>Transfer Registration</p> <p>You may transfer completed registration that you own to another user. Select the registrations to transfer and specify the email address of the user to transfer to. The transfer will not be complete until the user accepts the transfer.</p> <p>Page 1 of 1</p> <table border="1"> <thead> <tr> <th>Selection</th> <th>Registration</th> <th>Registration Details</th> <th>Transfer To</th> </tr> </thead> <tbody> <tr> <td>Select All Clear All <input checked="" type="checkbox"/></td> <td>L40876</td> <td>View</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>F40852</td> <td>View</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>L40850</td> <td>View</td> <td></td> </tr> </tbody> </table> <p>Enter the email of the user to whom you want to transfer the registration. To remove a transfer assignment simply leave the email field blank.</p> <p>Recipient Email : <input type="text" value="nincollej@yahoo.com"/> Transfer Registration</p>	Selection	Registration	Registration Details	Transfer To	Select All Clear All <input checked="" type="checkbox"/>	L40876	View		<input type="checkbox"/>	F40852	View		<input type="checkbox"/>	L40850	View	
Selection	Registration	Registration Details	Transfer To														
Select All Clear All <input checked="" type="checkbox"/>	L40876	View															
<input type="checkbox"/>	F40852	View															
<input type="checkbox"/>	L40850	View															

Steps	Actions																
	<p>The user will be presented with a message indicating the transfer was successfully initiated and the grid will be updated to show the email address to which the registration was transferred.</p> <div data-bbox="332 499 1388 1102" style="border: 1px solid #ccc; padding: 10px;"> <p>Transfer Registration</p> <p>You may transfer completed registration that you own to another user. Select the registrations to transfer and specify the email address of the user to transfer to. The transfer will not be complete until the user accepts the transfer.</p> <p style="text-align: center;">Page 1 of 1</p> <table border="1" data-bbox="370 697 1347 930"> <thead> <tr> <th data-bbox="370 697 553 806">Selection Select All Clear All</th> <th data-bbox="553 697 737 806">Registration</th> <th data-bbox="737 697 1019 806">Registration Details</th> <th data-bbox="1019 697 1347 806">Transfer To</th> </tr> </thead> <tbody> <tr> <td data-bbox="370 806 553 848"><input type="checkbox"/></td> <td data-bbox="553 806 737 848">L40876</td> <td data-bbox="737 806 1019 848">View</td> <td data-bbox="1019 806 1347 848">nincollej@yahoo.com</td> </tr> <tr> <td data-bbox="370 848 553 890"><input type="checkbox"/></td> <td data-bbox="553 848 737 890">F40852</td> <td data-bbox="737 848 1019 890">View</td> <td data-bbox="1019 848 1347 890"></td> </tr> <tr> <td data-bbox="370 890 553 930"><input type="checkbox"/></td> <td data-bbox="553 890 737 930">L40850</td> <td data-bbox="737 890 1019 930">View</td> <td data-bbox="1019 890 1347 930"></td> </tr> </tbody> </table> <p>Enter the email of the user to whom you want to transfer the registration. To remove a transfer assignment simply leave the email field blank.</p> <p style="text-align: center; color: red;">The registration transfer has been successfully initiated.</p> <p>Recipient Email : <input type="text"/> <input type="button" value="Transfer Registration"/></p> </div>	Selection Select All Clear All	Registration	Registration Details	Transfer To	<input type="checkbox"/>	L40876	View	nincollej@yahoo.com	<input type="checkbox"/>	F40852	View		<input type="checkbox"/>	L40850	View	
Selection Select All Clear All	Registration	Registration Details	Transfer To														
<input type="checkbox"/>	L40876	View	nincollej@yahoo.com														
<input type="checkbox"/>	F40852	View															
<input type="checkbox"/>	L40850	View															

Scenario B: Accepting a Registration Transfer

Steps	Actions
<p>1.</p>	<p>Access the LDR Website: Enter www.palobbyingservices.pa.gov in your internet browser's address line.</p> 
<p>2.</p>	<p>Log In: Enter your Keystone Login account credentials and click [Login].</p> 



Steps	Actions
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The user is presented with the Public Dashboard which displays the user's Number of Registrations by Status, Number of Registrations by Type, any Expense reports which are late or due as well as the status of any Affirmations.

The screenshot shows the 'Public Dashboard' interface. On the left is a navigation menu with buttons for: Dash Board, Registrations, Transfer Registration, Expenses, Affirmations, Terminations, Search, and Lobbying Directory. The main content area is titled 'Public Dashboard' and contains four data sections:

- Registrations by Status:**

Status	Count	Action
Completed	3	Details
Pending	1	Details
- Registrations by Type:**

Registration	Count	Action
Principal	2	Details
Lobbying Firm	1	Details
Lobbyist	1	Details
- Expenses:**

Year: Quarter:

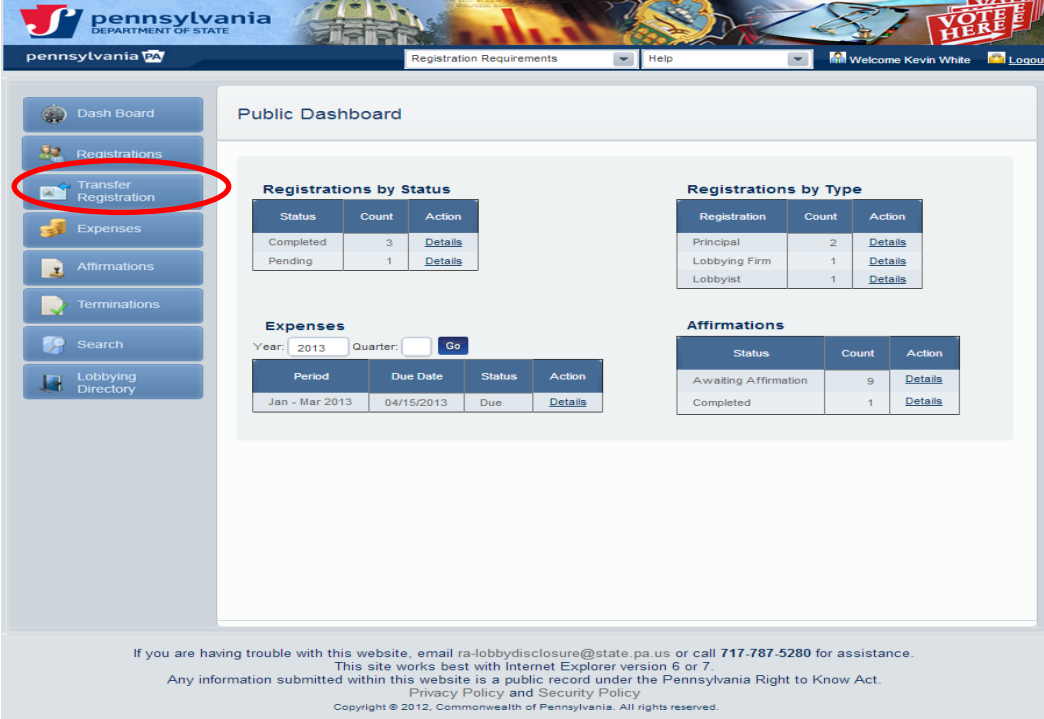
Period	Due Date	Status	Action
Jan - Mar 2013	04/15/2013	Due	Details
- Affirmations:**

Status	Count	Action
Awaiting Affirmation	9	Details
Completed	1	Details

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Steps	Actions
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3. Access the *Transfer Registration* page:
 Select **Transfer Registrations** from the left navigation.



Registrations by Status

Status	Count	Action
Completed	3	Details
Pending	1	Details

Registrations by Type

Registration	Count	Action
Principal	2	Details
Lobbying Firm	1	Details
Lobbyist	1	Details

Expenses


Year: 2013 Quarter: Go

Period	Due Date	Status	Action
Jan - Mar 2013	04/15/2013	Due	Details

Affirmations

Status	Count	Action
Awaiting Affirmation	9	Details
Completed	1	Details

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Steps	Actions
	<p>The <i>Transfer Registrations</i> page is displayed:</p> 
<p>4.</p>	<p>To accept a registration transfer, the user will click on the 'Accept' action link in the 'Accept Transfer Registration' grid for the registration to be accepted.</p> 