

How to File a Disbursement of Public Monies (DPM) Bi-monthly Report

1. There are two ways to start a DPM Bi-Monthly Report from your dashboard:

1. Click the 'Disbursements of Public Monies' button from the 'Lobbyist Filings' quick start menu.
NOTE: If you do not have an active Registration on behalf of the Contractual Client/Beneficial Client to disclose your Public Monies Lobbying Activities, you will need to select this method to file a DPM;

OR

2. From the 'Action Items' window, select the 'DPM' button that corresponds to the applicable Lobbyist/Client relationship you wish to file a Disbursement of Public Monies for. This method avoids having to manually select the Principal Lobbyist, Contractual and Beneficial Client information.

The screenshot displays the dashboard interface for the New York State Joint Commission on Public Ethics - Lobbying Application. The top navigation bar includes 'Dashboard', 'My Tickets', 'Messages', and 'Print'. The 'Quick Start' section is divided into four main areas: 'Lobbyist Filings', 'Client Filings', 'Other Filings', and 'Search or Create'. Under 'Lobbyist Filings', the 'Disbursement of Public Monies' button is highlighted with a red box and a red arrow pointing to it. The 'Action Items' section shows a table of active contracts with columns for ID, Period, and Lobbyist/Client. The 'DPM' button is highlighted for each entry in the table.

ID	Period	Lobbyist/Client	Available Actions
LR1910283 (1)	2019 - 2020	KG INC / KG INC SARANI PARTNERS L.P.	Amend Bi-mo DPM
PRO1910002	2019 - 2020	Public Corporation of Albany	Amend Bi-mo DPM
LR1910284 (2)	2019 - 2020	KG INC / KG INC 1 POINT STREET DEVELOPMENT, LLC	Amend Bi-mo DPM

2. Review the Principal Lobbyist, Contractual Client, and Beneficial Client names are all correct. You will not be able to change them once you begin the Filing. If you need to add additional Beneficial Client names, you may do so by entering the first few characters of the Beneficial Client in the search text field.
3. Select the appropriate 'biennial filing year' from the drop-down menu.

How to file: Disbursement of Public Monies Report Online

4. Click the **'Start'** button next to the reporting year/period you want to file (example - '2019 January – February').

The screenshot shows the 'Disbursement' form with three main sections: 'Lobbyist/Client Organization Info', 'Contractual Client Info', and 'Beneficial Client Name(s)'. Each section contains contact information for 'KG INC' and a search field. Below these are dropdown menus for 'Lobbyist/Public Corporation Name', 'Contractual Client Name', and 'Beneficial Client Name(s)'. At the bottom, there is a 'Year' dropdown menu set to '2019 - 2020' and a 'Period' dropdown menu set to '2019 January - February'. A blue 'Start' button is highlighted with a red box.

5. Indicate the **'Type of Lobbying Relationship'** (Employed or Retained) from the drop-down menu.

6. If applicable, enter the names of a **'Co-Lobbyist'** and/or **'Sub-Lobbyist'** by typing the first few characters of the name in the respective search text field. Otherwise, continue to the Beneficial Client(s) tab. A Co-Lobbyist and/or Sub-Lobbyist is NOT a Designated Lobbyist, Individual Lobbyist, Employee ('in-house') Lobbyist, or Retained Lobbyist.

The screenshot shows the 'Co/Sub Lobbyist(s) Information' section. It features a dropdown menu for 'Type of Lobbying Relationship' with a red box around it. Below are two search fields: 'Add Co-Lobbyist Search' and 'Add Sub-Lobbyist Search'. There are also links to create profiles that do not exist yet. A 'Continue' button is at the bottom left.

7. To add a new Beneficial Client, enter the first few characters of the **'Beneficial Client'** name in the text search box. To remove a Beneficial Client, click the red and white circle **'X'**. Please note that at least one Beneficial Client must be listed on a DPM Bi-monthly Report.

The screenshot shows the 'Beneficial Client(s)' section. It has a search field for 'Beneficial Client Search'. Below it is a list of 'Beneficial Clients Added' with one entry: '1 POINT STREET DEVELOPMENT, LLC'. A red arrow points to a red and white 'X' icon next to the entry, indicating how to remove it. A 'Continue' button is at the bottom left.

How to file: Disbursement of Public Monies Report Online

8. **Selecting Individual Lobbyists:** Only list the names of Individual Lobbyists who performed Public Monies Lobbying Activities during the applicable Bi-Monthly Reporting period. Click **'Modify'** to add or remove existing Individual Lobbyists. An Individual Lobbyist that has not already been included on the Organization Profile of the Principal Lobbyist may also be added directly to the DPM Bi-Monthly. For every Individual Lobbyist listed, indicate if they are a 'Designated Lobbyist' by clicking on the **'Designated'** checkbox.

Lobbyist Disbursement of Public Monies Form Reporting Period: 2019 January - February Full View

Individual Lobbyist Information

List each individual associated with the principal lobbyist who engaged in public monies lobbying activities for this client during this period.

Name	Phone	Email	Designated
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Continue →

9. **DPM Compensation & Expenses:** The DPM Compensation and Expense tab is divided into two sections: Compensation and Reimbursed Expenses, and Expenses.
 - a. **Compensation and Reimbursed Expenses sub-section:** Only report the Compensation and Expenses related to Public Monies Lobbying Activities that occurred during the applicable reporting period.
 - i. Enter the Compensation (dollar) amount in the **'Compensation (Current Period Only)'** text box.
 - ii. Enter the Reimbursed Expense (dollar) amount in the **'Reimbursed Expenses (Current Period Only)'** text box.

Lobbyist Disbursement of Public Monies Form Reporting Period: 2019 January - February Full View

DPM Compensation & Expenses

Summary of DPM Compensation and Reimbursed Expenses for this period

Compensation (Current Period Only) Reimbursed Expenses (Current Period Only)

0 0

Continue →

- b. **Lobbying Expenses sub-section:**
 - i. If you do not have any DPM expenses to report for the current Bi-Monthly reporting period, select the checkbox; otherwise, click the green **'Add'** button to report expenses.

Lobbyist Disbursement of Public Monies Form Reporting Period: 2019 January - February Full View

DPM Compensation & Expenses

DPM Expenses for Reporting Period Specified

I have no DPM expenses to report for this period

Report in the aggregate all DPM expenses exceeding \$75

Name	Date	Purpose	Amount
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Total Expenses (total of all expense categories)

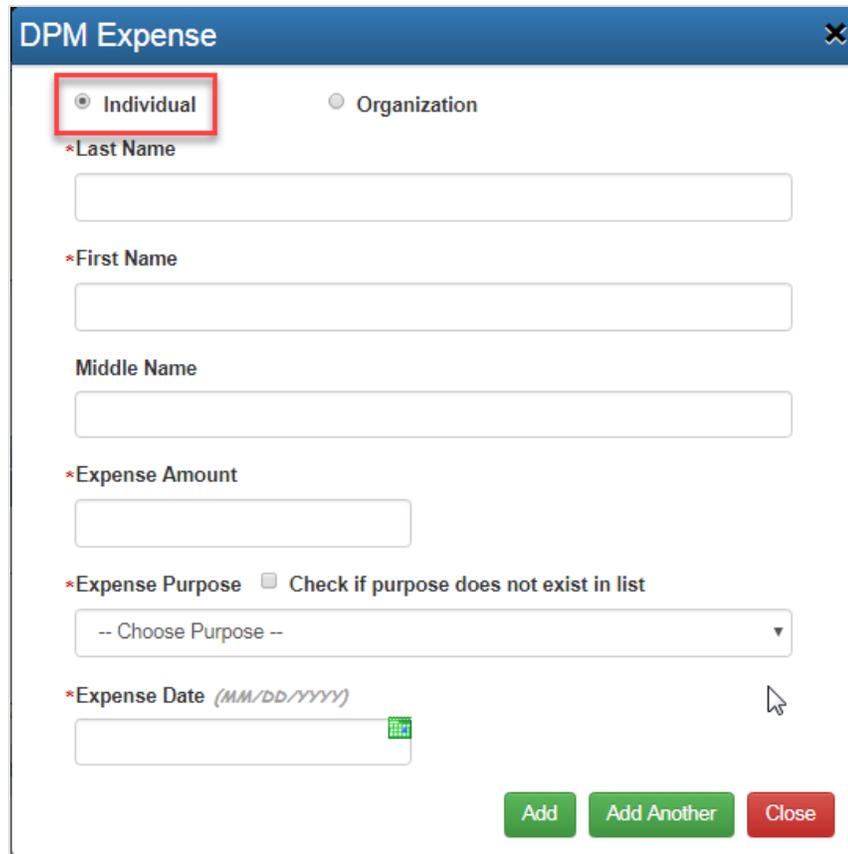
\$0

Continue →

How to file: Disbursement of Public Monies Report Online

ii. Reporting expenses paid to an Individual:

1. Select the **'Individual'** radio button.
2. Enter the **'Last name'**, **'First name'**, and **'Middle name'** (optional) of the individual in the applicable text box.
3. Enter the **'Expense Amount'** in the text box.
4. Indicate the **'Expense Purpose'** from the drop-down menu. If the Expense purpose is not an available option, click the **'Check if purpose does not exist in list'** button and type the expense purpose in the text field.
5. Indicate the **'Expense Date'** by clicking the calendar icon, or by typing the date using the MM/DD/YYYY format.
6. Click **'Add'** to save your changes and return to the previous screen. If you have more than one itemized expense to report, click **'Add Another'** instead.



The screenshot shows a web form titled "DPM Expense" with a close button (X) in the top right corner. At the top, there are two radio buttons: "Individual" (which is selected and highlighted with a red box) and "Organization". Below this, the form contains several input fields and a dropdown menu:

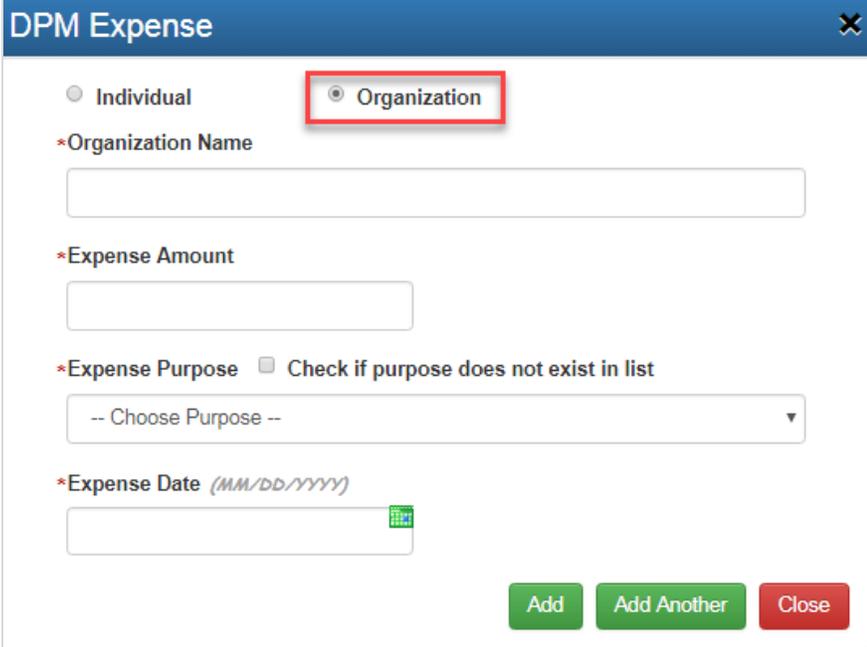
- *Last Name: A text input field.
- *First Name: A text input field.
- Middle Name: A text input field.
- *Expense Amount: A text input field.
- *Expense Purpose: A dropdown menu with the text "-- Choose Purpose --" and a downward arrow. To its right is a checkbox labeled "Check if purpose does not exist in list".
- *Expense Date (MM/DD/YYYY): A text input field with a small calendar icon to its right.

At the bottom right of the form, there are three buttons: "Add" (green), "Add Another" (green), and "Close" (red).

How to file: Disbursement of Public Monies Report Online

iii. Instructions for expenses paid to an Organization:

1. Select the **'Organization'** radio button.
2. Enter the **'Organization Name'** in the text box.
3. Enter the **'Expense Amount'** in the text box.
4. Indicate the **'Expense Purpose'** from the drop-down menu. If the Expense purpose is not an available option, click the **'Check if purpose does not exist in list'** button and type the expense purpose in the text field.
5. Indicate the **'Expense Date'** by clicking the calendar icon, or by typing the date using the MM/DD/YYYY format.
6. Click **'Add'** to save your changes and return to the previous screen. If you have more than one itemized expense to report, click **'Add Another'** instead.
7. To return to the previous screen, click **'Close'** again.



The screenshot shows a web form titled "DPM Expense" with a blue header and a close button (X) in the top right corner. The form contains the following elements:

- Two radio buttons: "Individual" (unselected) and "Organization" (selected and highlighted with a red box).
- A text input field labeled "*Organization Name".
- A text input field labeled "*Expense Amount".
- A dropdown menu labeled "*Expense Purpose" with the text "-- Choose Purpose --" and a downward arrow. To its right is a checkbox labeled "Check if purpose does not exist in list".
- A text input field labeled "*Expense Date (MM/DD/YYYY)" with a small calendar icon to its right.
- Three buttons at the bottom right: "Add" (green), "Add Another" (green), and "Close" (red).

10. **Lobbying Activities:** Every DPM must disclose the Level of Government Lobbied, a brief description of the grant, loan, or agreement, and the parties lobbied involving the DPM.

- a. **Step 1** – Select the **'Level of Government Lobbied'** (State Lobbying, Municipal Lobbying, Both) from the drop - down menu.
- b. **Step 2** – Click **'Add'**

How to file: Disbursement of Public Monies Report Online

The screenshot shows the 'Lobbyist Disbursement of Public Monies Form' for the reporting period of 2019 January - February. The form is titled 'Lobbying Activities' and includes a 'Full View' button. Under the 'Type/Level of Government' section, there is a dropdown menu for 'Level of Government' with the text '-- Choose Type --'. Below this is a section for 'Description of the grant, loan, or agreement involving DPM' which contains a table with columns for 'Description' and 'Parties Lobbied'. A green 'Add' button is located at the end of the 'Parties Lobbied' column. A 'Continue' button is at the bottom left.

- c. **Step 3** – From the pop-up window, provide a brief **'description'** of the grant, loan, or agreement involving the DPM in the text box.
- d. **Step 4** – Type the asterisk symbol **'*'** to view a comprehensive list of **'Party'** names available for selection; otherwise enter the first few characters of a Party name to view possible matches. If after searching using both methods, the **'Party'** name is not found, select the **'Click here to add Party Name if not found'** hyperlink.
- e. **Step 5** – Click **'Add'** when you have finished entering **'Parties Lobbied'** associated to the DPM description. To remove a **'Party'** click the red and white circle **'X'** icon.

The screenshot shows a pop-up window titled 'Description of the grant, loan, or agreement involving DPM'. It contains a text box for the description with the text 'A grant on single stream recycling that impacts Albany County.' Below this is a section for 'Add Party Lobbied' with a search box for 'Party Type * for full list of parties' and a link 'Click here to add Party Name if not found'. At the bottom is a table titled 'Parties Lobbied' with columns for 'Government Body' and 'Name'. The table lists three entries: 'Town Special District' with '(MAGEE) FIRE PROTECTION DISTRICT #1', 'City' with 'Albany', and 'NYS School Districts' with 'Albany City School District'. Each row has a red and white circle 'X' icon to its right. A red arrow points to the 'X' icon for the first row. At the bottom right are 'Add' and 'Cancel' buttons.

Government Body	Name	
Town Special District	(MAGEE) FIRE PROTECTION DISTRICT #1	X
City	Albany	X
NYS School Districts	Albany City School District	X

How to file: Disbursement of Public Monies Report Online

- f. To edit, click the 'pencil' icon. To remove, click the red and white circle 'X' icon.

Lobbyist Disbursement of Public Monies Form Reporting Period: 2019 January - February [Full View](#)

Lobbying Activities

Type/Level of Government

Level of Government
State Lobbying

Description of the grant, loan, or agreement involving DPM

Description	Parties Lobbied	
A grant on single stream recycling that impacts Albany County.	(MACEE) FIRE PROTECTION DISTRICT #1 Albany Albany City School District	Add

[Continue](#)

11. **Attestation:** Click the 'Attestation' checkbox and click 'Submit'.

[Submit](#) [Discard](#) [Save](#) Auto Saved: 4:42PM

Lobbyist Disbursement of Public Monies Form Reporting Period: 2019 January - February [Full View](#)

Attestation

declare under penalty of perjury that the information contained in this filing is true, correct, and complete to the best of my knowledge and belief.

Filer Name
Blue, Tempest

CAO Name
KG, Last

[Continue](#)

Congratulations you are all done!