



ACCESSING THE NEW JCOPE LOBBYING APPLICATION: *What You Need to Know*

JCOPE is launching a new online Lobbying Application (“LA”) to coincide with the 2019-2020 biennial registration period and new lobbying regulations (19 NYCRR Part 943), which take effect January 1, 2019. Anyone required to register and file lobbying reports with JCOPE, whether existing or new filers, will submit their 2019 online reports in the new application. (**Note:** Lobbying reports covering 2018 lobbying activity must be filed utilizing the current online lobbying system).

To access the new lobbying application, filers must have a NY.gov ID account. If you don’t have one, you can create an account at <https://my.ny.gov>. Once a filer has a NY.gov ID and has accessed the new LA, they must set up a **User Profile** in the application; more on that below.

Here are some frequently asked questions (“FAQs”) to assist you during the rollout of the new LA. Following the FAQs is a list of next steps and things to consider ahead of accessing the new system, which will be available for creating profiles in early November.

**** PLEASE NOTE – Ahead of starting to use the new LA, please make sure to update the web browser you use for these filings to the most recent version. ****

NY.gov ID FAQs

1. **What is a NY.gov ID account?**

A NY.gov ID account is a secure online service that allows users to create one username and password to access multiple government online services.

2. **Why do I need a NY.gov ID account?**

Agencies across New York State utilize NY.gov ID accounts to provide citizens with access to government services without having to create multiple usernames and passwords for each unique online State government application. Individuals without a NY.gov ID **will not** be able to file lobbying reports in the new LA.

3. **What type of NY.gov ID accounts are available for me?**

Anyone requesting access to the new LA will be required to create a “personal” account. To create an account, go to: <https://my.ny.gov/>.

4. **What if I already have a personal account?**

If you already have a “personal” NY.gov ID account, you will be able to use your existing credentials, e.g., for tax or DMV services. JCOPE will provide an enrollment link that will allow you to verify your account and give you access to the new LA. We anticipate the enrollment link will be available on the JCOPE website during the first week of November.

5. **What information do I need to provide to create a new NY.gov ID account?**

You will need a valid e-mail address which is *unique to you*. Please do not use a general email address that is accessed by multiple people. Basic identifying information such as your first and last name is also required. In creating your NY.gov ID account, you will be required to create a unique username, and select and answer three security questions to verify your identity if you forget your username or password.

6. **Are there any fees associated with requesting or using a NY.gov ID account?**

No.

7. **Who do I contact if I have issues with a NY.gov ID account?**

Call the NY.gov ID Customer Care Center at 1-800-697-1323.

8. **What happens if I forget my password?**

Passwords can be reset, but **cannot** be recovered. If you forget your password, you can use the “**Forgot Your Password**” link on the my.ny.gov homepage to reset it.

9. **What should I do if I forget my NY.gov user ID and password?**

If you cannot remember your user ID or password, contact the NY.gov ID Customer Care Center at 1-800-697-1323. Do **NOT** contact the JCOPE Helpdesk, as JCOPE staff cannot assist you with any issues related to a NY.gov ID account.

10. **What if I do not remember which e-mail address I used to create a NY.gov ID account when I took my Ethics for Lobbyists training?**

JCOPE staff may be able to assist you. Email JCOPE’s Education Unit at education@jcope.ny.gov.

11. **When should I create a NY.gov ID account and do I need to notify JCOPE once I do?**

JCOPE staff recommends creating a NY.gov ID account in early November so you have plenty of time to troubleshoot any potential issues that may arise. You **do not** need to notify JCOPE that you have created an account. Please remember to write down your username and password since the JCOPE Helpdesk will **not** be able to help you to recover a username or password.

LA User Profile FAQs

1. **What is the difference between NY.gov ID enrollment and creating a User Profile in the new LA?**

Creating a NY.gov ID username and password is the **first step** required to access the new JCOPE system. Once you have created your NY.gov ID and verified your account through the JCOPE enrollment link (to be provided), then you can go on to create a User Profile in the new LA.

My.ny.gov and the new LA are two **different** online applications. A NY.gov ID can be used by any State government entity to grant public access to an online service. JCOPE's new LA is owned and operated by JCOPE.

2. **What types of profiles are available?**

There are two types of profiles in the new system:

1. User Profiles
2. Organization Profiles

User Profiles are “owned” by the individual; an Organization Profile is “owned” by the Responsible Party (generally a Chief Administrative Officer, or CAO).

3. **Who needs to create a User Profile, and what role(s) do these individuals play for the organization that is required to file lobbying reports?**

The following individuals are required to create a User Profile:

- **The CAO (Responsible Party) of a Lobbyist or Client Organization** – The Responsible Party is generally the CAO. The CAO is ultimately responsible for all lobbying filings submitted to JCOPE.
- **Delegated Administrators** – Delegated Administrators can submit filings or assign Preparer(s) to do so. The CAO can act as the Delegated Administrator or assign a designee. An Organization Profile can have **two** Delegated Administrators assigned to it.
- **Preparers** – A Preparer is an individual hired to prepare and submit filings on behalf of Individuals or Organizations who are required to submit lobbying filings to JCOPE. A Preparer can work for any number of Individuals or Organizations. Organizations can assign multiple Preparers to their Organization Profile. **Note:** If an Organization elects to use a Preparer, **it** must assign the Preparer; Preparers **cannot** assign themselves to an Organization.
- **Individual Lobbyists** – User profiles are automatically created by the Lobbying application for Individual Lobbyists (formerly known as “Additional Lobbyists”) once a Lobbyist/Client Organization begins a filing. Individual Lobbyists are **not** required to verify a User Profile if their only role is as an Individual Lobbyist.

4. **Who can make changes to a filing or an Organization Profile?**

Authorized Persons can submit and make changes to a filing and/or an Organization Profile. Authorized Persons include the CAO (Responsible Party), Delegated Administrators, and Preparers.

5. **What permissions are attached to the different roles played by individuals filing in LA?**

- **CAO (Responsible Party)** – As the owner of the Organization Profile, the CAO (Responsible Party) can modify every field in that profile. They can submit filings and assign Delegated Administrators and Preparers. It is the responsibility of the CAO or Delegated Administrator to remove either a Delegated Administrator or Preparer(s) from an Organization Profile.
- **Delegated Administrator** – Can modify any field in the Organization Profile. A Delegated Administrator can submit filings. A Delegated Administrator can remove the alternate Delegated Administrator, if applicable.
- **Preparer** – Can only be assigned by Individuals or Organizations for whom they are retained. Once assigned, Preparers can modify any field on an Organization Profile or filing **except** the name of the CAO and the names of Delegated Administrators. **Please note:** A Preparer **cannot** assign themselves to an Organization Profile or assign other Preparers to an Organization.
- **Individual Lobbyist** – If an Individual Lobbyist is also designated as a Preparer or Delegated Administrator, they are granted permissions applicable to those roles.

6. **When will I be able to create my User Profile in the new LA?**

JCOPE will send e-blasts and post reminders when the new LA is ready for User and Organization Profile creation. Please check your email and the JCOPE website regularly. We anticipate having this available in early November.

7. **I am an existing filer in the current JCOPE online Lobbying Filing System. Will I still have access to my old filings?**

Yes. All previous filings submitted in JCOPE's current online Lobbying system will remain accessible until they are eventually transferred to the new LA. JCOPE will provide sufficient notice to filers before this occurs.

8. **I am an existing filer and will need to submit my 2018 November/December Bi-Monthly Report and/or my 2018 July-December Client Semi-Annual Report. Where do I file these reports?**

All filings covering 2018 lobbying activity must be filed in the **current JCOPE Online Lobbying Filing System**. This also includes the 2018 November/December Disbursement of Public Monies Report.

9. **When will I be able to submit a 2019-2020 Lobbyist Statement of Registration?**

We anticipate both existing and new filers will be able to prepare and submit their 2019-2020 Statements of Registration the first week of December in the new LA.

10. **Will JCOPE provide technical instructions for creating a NY.gov ID account and a User Profile in the new LA?**

Yes. Detailed instructions will be sent via e-mail to all e-mail addresses provided in the current system, as well as posted in multiple easy-to-find locations on the JCOPE website (<https://jcope.ny.gov>)

11. **If I need help creating my User Profile in JCOPE's new LA, who do I contact?**

You may contact the JCOPE Helpdesk at 800-87-ETHICS (873-8442). When prompted, press '1' to speak to a Lobbying Filings Specialist.

Next Steps: Things to consider and prepare for prior to the profile launch in early November

For Client and Lobbying Organizations (including those who lobby on their own behalf)

Applicable to both existing and new filers:

- 1) **Create** your personal NY.gov ID account.
- 2) **Review the roles and permissions** available in JCOPE's new LA and decide who within your Organization should be assigned to each role. Each individual assigned to a role will need their own unique NY.gov ID. Each Organization Profile has the following roles available:
 - One CAO (Responsible Party) **(required)**
 - One Delegated Administrator **(required, can be the CAO)**
 - A second Delegated Administrator **(optional)**
 - Preparer(s) **(optional)**
- 3) **Contact your Preparers.** It is the responsibility of the CAO and/or Delegated Administrator(s) to assign or accept a Preparer(s). This guarantees that only the people **you** select will have access to your Organization's information and filings. **Note:** A Preparer **cannot** assign themselves to your Organization.
- 4) **Check your email** and the JCOPE website (<https://jcope.ny.gov>) regularly for the official announcement that User Profiles may be created; we anticipate that happening in early November.
- 5) **Create your User/Organization Profile** in the new LA once JCOPE has notified you that this function is available.

Special considerations for existing filers:

Once the new LA is available for filers to create their Profiles, the CAO (Responsible Party) will need to “claim” their Organization Profile and review and update any information contained in it. Once an Organization Profile is “claimed” by an individual, it **cannot** be claimed by anyone else. To avoid any issues, please ensure the CAO (Responsible Party) is the **only** person to “claim” the Organization Profile. JCOPE’s Helpdesk will be able to assist you if someone has “claimed” an Organization Profile accidentally. We will provide more information on this in the coming weeks.

Special considerations for Preparers:

When the new online filing system is available:

- 1) **Create** your **NY.gov ID account** (if you haven’t already done so).
- 2) **Create** your **User Profile**.
- 3) **Do not** “claim” an **Organization Profile**.
- 4) **Contact each** Organization you are authorized to prepare and submit filings on behalf of, and let them know they can now assign you to their Organization Profile. You will **not** be able to prepare or submit filings until you are assigned to the Organization Profile.