

## STEP 2: HOW TO CREATE YOUR USER PROFILE IN THE JCOPE LOBBYING APPLICATION

### User Profile Creation – Identity verification

1. Select either the **'State Issued DMV ID'** or **'Last 4 of SSN'** (Social Security Number) radio button to verify your identity.
  - a. Enter your **'State Issued DMV ID'** number and select the **'Issuing State'** using the drop-down menu, or;
  - b. Enter the **'Last 4 digits of your SSN'**



**PRO TIPS:** All fields denoted by a red asterisk (\*) are required fields. Click any of the **“info icons”** for more information related to a subject area. These icons provide helpful definitions and/or instructions to assist you in making an appropriate selection.

2. Enter your **Last Name; First Name, Middle Name and Suffix (optional)** and **Title**.



3. Enter your Business Address information including the **Business Street Address, Street 2 (optional) City, State, Zip and Country**. To add an **'Alternate Address'**, click the green button (optional).



- To include more than one mailing address in your User Profile, click the **'Add Alternate Address'** (optional). To make the alternate mailing address your primary address, click the **'Primary Mailing Address'** check box. To remove this information, click the **'Remove Alt Address'** button.

- For international phone numbers, enter the **'Country Code'** in the **'Country'** text field. Enter your **'Business Phone'** number, extension (optional), and email address. Do not use a general email inbox. You may also include an optional alternate phone number and alternate email address (optional).

- Enter an **'Also Known As'** ("AKA") (optional) by clicking the green **'Add AKA'** button. The Also Known As is available for organizations that may be known to the public through the use of an acronym or other alternate name. To remove an AKA, click the circular red **'X'** symbol.

- Select the **attestation** check box and click **'Submit'** to create your new User Profile. Once that has been created, you will be directed to your Lobbying Application Dashboard.



If you are a CAO or Delegated Administrator, continue to “Step 3: How to Search for and Claim an existing Organization Profile” or “Step 3: How to create a new Lobbying or Client Organization Profile”. If you are a Preparer, contact the organizations that you prepare filings for and notify them you have created a new user profile in LA and provide them with your **‘Individual ID’** number so they may assign you as a Preparer. Instructions on where to locate your Individual ID are provided below.

### Special Instructions for Preparers Only

1. From your dashboard, click **‘Your Name’** on the upper right corner of your screen to view your User Profile.



2. The **‘Individual ID’** is located at the top of the screen. Provide that number to all Organizations that you prepare and submit filings for.



# OVERVIEW: NAVIGATING THE LA DASHBOARD

## What is a dashboard?

A dashboard is a visual display that organizes information and system functions in a format that is easy to read and locate. The LA Dashboard is divided into the following sections:

1. **Quick Start Menu** – The Quick Start Menu allows you to quickly file a new Registration, Bi-Monthly, Client Semi-Annual, Source of Funding, Reportable Business Relationship, or Disbursement of Public Monies Report. Users may also easily file an Extension or create a new profile for an Organization.
2. **Affiliated Organizations** – If you are listed as a CAO, Delegated Administrator, or an Authorized Preparer on an Organization profile, those Organizations will appear under the 'Affiliated Organization' section of the dashboard. To access the full Organization Profile, click 'View'.
3. **Action Items** – Action items require further attention. View any open ticket and/or saved forms that need to be submitted to JCOPE.
4. **My Forms** – Access your saved and submitted forms. This section is categorized by the name of the form. To view the forms within a specific category (e.g. Bi-Monthly, Registration, etc.), click the name of the form.
5. **My Tickets** – This section alerts you to areas of your filings that may require further attention. Tickets are typically generated from a JCOPE Lobbying Filing Specialist.

The screenshot shows the LA Dashboard interface with the following sections and callouts:

- 1. Quick Start:** A top navigation bar with buttons for "Lobbyist Filings" (Registration, Bi-Monthly, Disbursement of Public Monies), "Client Filings" (Client Semi-Annual, Source of Funding, Exemption), "Other Filings" (Extension, Reportable Business Relationship), and "Search or Create" (Organization).
- 2. Affiliated Organizations:** A list of organizations with "View" links, including American Lobbyists, DR. JOHN D'AMBROSIO, KG INC, Little Moon Coalition, Lobbyists R US, Public Corporation of Albany, and Tempest B.
- 3. Action Items:** A table of "Open Tickets (4)" with columns for ID, Status, Type, Last Modified, and Description. Rows include tickets 4578, 3529, 3830, and 3328.
- 4. My Forms:** A table of "Registration (18)" forms with columns for ID, Period, Lobbyist/Client, Submitted, and Status. Rows include forms LRO1810006, LRA1810035, LRA1810034, LRA1810033, LRA1810032, and LRA1810030.
- 5. My Tickets:** A table of "Open Tickets (24)" with columns for ID, Status, Type, Last Modified, and Description. Rows include tickets 3700, 3707, 3730, 3740, 3741, and 3742.