2019-2020 Lobbyist Bi-monthly and Bi-monthly Amendment Information

Any Principal Lobbyist required to file a Statement of Registration for a Client in a biennial period must also file Bi-monthly Reports, regardless of Compensation, Expenses, or Lobbying Activity, up to the Termination (End) Effective Date.

PURPOSE

The purpose of this document is to assist Filers with the submission of Bi-monthly Reports and Bi-monthly Amendments in JCOPE's new Lobbying Application.

> **NOTE:** This document is **not** intended to assist Individuals/Organizations in determining whether their activities require registration and reporting to JCOPE. For assistance in determining whether your activities are considered Lobbying Activities which require Registration and Bi-monthly reporting, please refer to the Guide to Lobbying and the regulations available on the JCOPE website.

THINGS TO KNOW

Unlike the Registration which considered is a forward-looking document that requires the Lobbyist to disclose the Lobbying Activities (Focuses and Parties) expected (or *anticipated*) to be lobbied during the biennial period, the Bi-monthly Report requires disclosure of the ***actual*** Lobbying Activities that occurred during the specific reporting period. Greater specificity is required, including the direct relationships that exist between Focus(es) and Party(ies) Lobbied.

- The Lobbying Act requires a registered Lobbyist to submit a Bi-monthly Report for each reporting period their Agreement/Contract is active (based on the Lobbying Agreement Start and Termination (End) Dates).

- Lobbyists must continue to file all required Bi-monthly Reports by their statutory due dates, reporting all Lobbying Activity up to the Termination Effective (End) Date provided in the Lobbying Agreement.

- A Bi-monthly Report can be filed after a Lobbying Agreement Termination (End) Date, as long as the Lobbying Agreement was "active" during the reporting period for which the Bi-monthly Report is being filed.

- Separate Lobbyist Bi-monthly Reports are required for *each* Contractual Client/Beneficial Client relationship (pairing) for which the Lobbyist is registered to lobby.

- Bi-monthly Reports must be submitted even when Compensation, Expenses, or Lobbying Activity did not occur during a Bi-monthly reporting period. Bi-monthlies must continue to be submitted for as long as the Agreement/Contract is in effect (or "active"), even if only for a portion of a Bi-monthly reporting period.

- Bi-monthly Reports must be submitted in chronological order based on the Lobbying Agreement Start Date.

- A Bi-monthly Report may be started, saved, and submitted beginning on the first day of the Bi-monthly's reporting period (example – the March/April Bi-monthly can be started March 1); as long as the Lobbying Agreement is "active" during the reporting period for which the Bi-monthly Report is being filed.

- Once submitted, a Bi-monthly Report cannot be deleted. The Filer must submit a Request to Withdraw to remove the Filing from public view.

- Once submitted, the Filer cannot make any changes to the Report. A Bi-monthly Amendment must be submitted.

BI-MONTHLY REPORTING PERIODS & DUE DATES

BI-MONTHLY REPORTING PERIOD	PERIOD COVERED	DUE DATE
January/February	January 1 – February 28	March 15
March/April	March 1 – April 30	May 15
May/June	May 1 – June 30	July 15
July/August	July 1 – August 31	September 15
September/October	September 1 – October 31	November 15
November/December	November 1 – December 31	January 15 (of the following year)

NOTE: Effective January 1, 2019, JCOPE will grant a 7-day grace period from a Filing's statutory due date to submit a required Statement and/or Report(s) before any potential late fees *may* be imposed.

INFORMATION COLLECTED ON THE BI-MONTHLY REPORT

The online Bi-monthly Report in the new LA contains its own main navigation menu and can be viewed in a "tabbed format" or in "full view", depending on Filer preference.

Online Filings will populate specific Information from existing Profiles, if available, and the most recently submitted Filing of the associated Lobbyist/Client pairing (Biennial Registration, Registration Amendment, Bi-monthly or Amendment):

- Principal Lobbyist Information
- Contractual Client Information

- Beneficial Client Information
- Individual Lobbyist Information
- Co-Lobbyist Information
- Sub-Lobbyist Information

  NOTE: You must have an existing (active) Registration on file for the Lobbyist, Contractual Client, Beneficial Client relationship (pairing) before a Bi-monthly Report can be submitted.

The Bi-monthly Report contains the following fields. Items denoted with a red asterisk '*' are required fields.

Biennial Period*

Every two-year period commencing with the January 1, 2005 – December 31, 2006 period, and so on thereafter.

Bi-monthly Reporting Period*

- January/February
- March/April
- May/June
- July/August
- September/October
- November/December

Principal Lobbyist *

Data disclosed on your corresponding Registration of the applicable Lobbyist/Client pairing will populate this information on your Bi-monthly Report.

Client Information*

Data disclosed on your corresponding Registration of the applicable Lobbyist/Client pairing will populate this information on your Bi-monthly Report.

The name(s) of both the Contractual and Beneficial Client(s) must be identified on every Bi-monthly Report.

BENEFICIAL CLIENT INFORMATION

You may add *new* Beneficial Client(s) directly to a Lobbyist Bi-monthly Report, which will create a system-generated Registration Amendment adding the new Beneficial Client(s). LA will also ask you to identify any other Filings you would like to add the *new* Beneficial Client(s) to; which will also create system-generated Amendments to those Filings.

When adding a *new* Beneficial Client to your Lobbyist Bi-monthly Report, you may be required to provide the following information if a verified Profile does not yet exist in LA:

(a) Beneficial Client Business Name
The **Organization Name** (including Coalitions and Public Corporations)

(b) Beneficial Client Business Address, Phone Number, Email Address
The address, phone number, and email address of the Beneficial Client's place of business.

(c) Beneficial Client Responsible Party (Chief Administrative Officer)
You may be required to also provide the name of the person who is responsible for making and filing Statements and Reports required under the Lobbying Act for the Beneficial Client, as well as their business title, address, phone number, and email address.

You may remove Beneficial Client(s) directly from a Lobbyist Bi-monthly Report ***IF* you have an active Registration with multiple Beneficial Clients listed since at least one Beneficial Client must be listed on a Lobbyist Bi-Monthly filing.**

NOTE: Removal of a **Beneficial Client** does **NOT** create an Amendment and/or Termination. Removing **a Beneficial Client** from a Lobbyist Bi-monthly Report has no impact on the associated Registration Filing. If your relationship has terminated, you must submit either a Registration Amendment, or Termination.

Co-Lobbyist(s) – AND – Sub-Lobbyist(s) Information (if applicable)

Data disclosed on your corresponding Registration of the applicable Lobbyist/Client pairing will populate this information on your Bi-monthly Report.

You can add *new* Co- and/or Sub-Lobbyist(s) directly to a Bi-monthly Report, which will create a system-generated Registration Amendment adding the new Co- and/or Sub-Lobbyist(s). LA will also ask you to identify any other Filings you would like to add the *new* Beneficial Client(s) to; which will also create system-generated Amendments to those Filings. (NOTE: System-generated **Registration Amendments** may require a new lobbying agreement/authorization.)

Removal of either a Co- and/or Sub-Lobbyist does **NOT** create an Amendment and/or Termination. Removing Co- and/or Sub-Lobbyist(s) from a Bi-monthly Report has no impact on the associated Registration Filing.

NOTE: Co- and Sub-Lobbyists are **NOT** considered Designated Lobbyists, Individual Lobbyists, Employee ('in-house') Lobbyists, or Retained Lobbyists by the Principal Lobbyist responsible for submitting this Filing.

Individual Lobbyist(s) Information (FKA Additional Lobbyists)

Data disclosed on your corresponding Registration of the applicable Lobbyist/Client pairing will populate this information on your Bi-monthly Report.

Your Bi-monthly Report must disclose the name(s) of any Individual Lobbyist that performed Lobbying Activities on behalf of the Principal Lobbyist for the benefit of the Client during the specific Bi-monthly reporting period.

Individual Lobbyist(s) included in your Organization Profile do **NOT** automatically populate to your Bi-monthly Report; however, those Individuals are available to add.

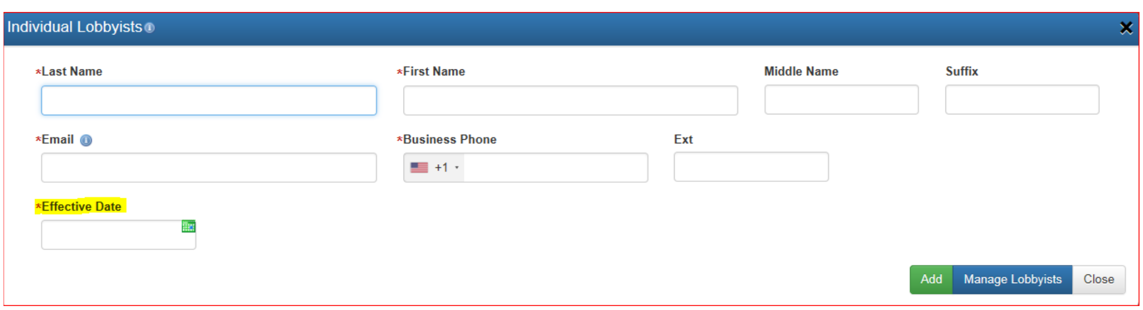
You can also add *new* Individual Lobbyists directly to a Bi-monthly Report (***Individuals who were NOT previously listed on the Organization's Profile***) *. This *new* Individual Lobbyist will be immediately available for selection on other Filings and will be added to the list of Individual Lobbyists contained in your Organization's Profile as well.

Removal of an Individual Lobbyist does **NOT** create an Amendment and/or Termination. Removing an Individual Lobbyist from a Bi-monthly Report has no impact on the associated Registration Filing. Individuals removed from a Bi-monthly Report will still be available through the list of the Individual Lobbyists contained in your Organization's Profile.

*Adding a 'new' Individual Lobbyist requires an "Effective Date".

*Individual Lobbyist Effective Date

The Individual Lobbyist's **"Effective Date"** is the is the earliest date that Individual was authorized to engage in Lobbying Activities for the Principal Lobbyist on behalf of at least one of the organization's clients. The date is used to determine that Individual's online ethics training requirement.



If the Individual Lobbyist is lobbying as a board member, director or officer of the Principal Lobbyist, select the **'Designated Lobbyist'** check-box.

> NOTE: At least one Individual Lobbyist must be listed on any Filing where "Direct Lobbying" is indicated as the Type of Lobbying Activity.

Compensation and Expense Amounts for Bi-monthly Reporting Period*

Compensation and Expenses for Retained Lobbyists must be disclosed during the reporting period in which they are expended, received or incurred.

All Compensation and Expenses associated with Lobbying Activity should be accounted for using accrual basis accounting, i.e., costs are reported in the period in which they are incurred.

For purposes of calculating total Compensation and Expenses received, expended or incurred by a Lobbyist or Client, the $5,000 annual threshold shall be computed cumulatively for all Lobbying Activities undertaken by the Lobbyist or Client (whether as a Beneficial Client or Contractual Client).

Lobbying Agreement Compensation Amount

For your convenience, the Lobbying Agreement Compensation Amount disclosed on your Statement of Registration is available as a *read only*.

There are TWO sub-tabs in the Comp & Expenses Section:

1. **Compensation and Reimbursed Expenses sub-tab**

   Compensation

   Any salary, fee, gift, payment, benefit, loan, advance, or any other thing of value paid, owed, given, or promised to the Lobbyist by the Client, or employer, in exchange for Lobbying or services that benefit Lobbying Activity including year-end or other bonuses. Fringe benefits are excluded from the definition of Reportable Compensation.

   Reimbursed Expense(s)

   The dollar amount reimbursed to the Lobbyist in connection with a Lobbying Activity, excluding Lobbyist Compensation.

   NOTE: The Reimbursed Expense Total must be $0 if there are no Lobbying Expenses disclosed in the Expense Section.

2. **Other Lobbying Expenses sub-tab**

   (a) Expenses

   An expense is any cost of Lobbying Activity that is not Compensation paid to a Lobbyist and that is incurred by or reimbursed in connection with a Lobbying Activity.

   Expense Types required to be reported on a Filing include:

   1. **Salaries of non-Lobbying staff** – Compensation paid to those professional and clerical employees who do not engage in Direct or Grassroots Lobbying Activity.

   2. **Aggregated** – Expenses of $75 or less may be reported as a single aggregated total dollar amount.

3. **Itemized** – Expenses valued at more than $75 must be itemized and include the payee, and nature and value of the expense.

4. **Reimbursed** – A Lobbyist should report the aggregate value of all Expenses (regardless of the value of the individual Expense) that were reimbursed by the Client.

(b) Itemized Expenses

Any **Reportable Expense** valued at more than $75 must be fully identified on Bi-monthly Reports and must include the name of the person or entity to whom it was paid, the date of the Expense, as well as the purpose for which it was paid.

- Lobbyists should indicate whether the Expense was reimbursed by the Client.

You can select the check-box to indicate you have no **'Itemized Expenses to Report'**.

> **NOTE:** Any **Reportable Expense** paid to an entity requires the Filer to provide an 'Expense Detail' for the **Itemized Expense** if any portion of the Expense is attributable to an individual or individuals. Each individual's identity must be disclosed. The Expense Detail may note numerous individuals per Itemized Expense.

(c) Expense Detail (if applicable)

If an Itemized Expense is **paid to an Organization** *on behalf of an Individual (or Individuals),* an **Expense Detail** is required and must include the following information:

- Name of individual(s) (Multiple individuals can be added)
- Amount of Detailed Expense that is attributed to the individual listed

The dollar amount(s) attributable to *each* Individual disclosed in the Expense Detail Section must, when added together, equal the Total (Dollar Amount) of the Itemized Expense paid to the Organization. (Expense Detail A + B + C = Total (Dollar amount) of the Itemized Expense.)

EXAMPLE: If Principal Lobbyist ABC Company paid an expense in the amount of $300 to American Airlines (on behalf of Individuals affiliated to the Principal Lobbyist) during the January/February reporting period, the disclosure might look like this:

NAME OF ORGANIZATION: American Airlines
DATE OF THE EXPENSE: February 20, YEAR
TOTAL (Dollar amount) of the Itemized Expense: $300
EXPENSE PURPOSE: Travel

EXPENSE DETAIL A

NAME OF INDIVIDUAL

Last Name: Smith

First Name: John

Middle [optional]

TITLE OF INDIVIDUAL: Lobbyist

AMOUNT OF EXPENSE THAT IS ATTRIBUTED TO THE INDIVIDUAL: $100

EMPLOYER OF INDIVIDUAL: ABC Company

EXPENSE DETAIL B

NAME OF INDIVIDUAL

Last Name: Doe

First Name: Jane

Middle [optional]

TITLE OF INDIVIDUAL: Lobbyist

AMOUNT OF EXPENSE THAT IS ATTRIBUTED TO THE INDIVIDUAL: $100

EMPLOYER OF INDIVIDUAL: ABC Company

EXPENSE DETAIL C

NAME OF INDIVIDUAL

Last Name: Smith

First Name: Peter

Middle [optional]

TITLE OF INDIVIDUAL: Lobbyist

AMOUNT OF EXPENSE THAT IS ATTRIBUTED TO THE INDIVIDUAL: $100

EMPLOYER OF INDIVIDUAL: ABC Company

(d) Coalition Member Contributions (if applicable)

A Coalition who opts to file as a Lobbyist or Client is **NOT** required to disclose Coalition Member Contributions on their Bi-monthly Report.

However, if such Coalition does **NOT** file its ***own* lobbying reports** as a Lobbyist or Client, the member (Beneficial Client) of a Coalition is required to disclose their contribution to the Coalition, including contribution amount and name of Coalition to which it contributed.

Lobbying Subjects for Bi-monthly Reporting Period*

Data disclosed on your corresponding Registration of the applicable Lobbyist/Client pairing will populate this information on your Bi-monthly Report.

Lobbying Subjects identify the specific subject matter area(s) on which Lobbying occurred. These

Subjects identify the 'Nature of Business' between the Lobbyist and Contractual Client.

At least one Lobbying Subject ***is required*** to be disclosed on each Bi-monthly Report.

***Refer to* JCOPE's website for the most up-to-date list**.

Lobbying Activities for Bi-monthly Reporting Period*

Reportable **"Lobbying"** or **"Lobbying Activity"** is defined as any ***Attempt to Influence*** activity included in Section 1-c(c) of the Lobbying Act and includes both Direct Lobbying and Grassroots Lobbying.

Lobbying Activity Information is populated from your previous Filings for the Lobbyist/Client pairing (Bi-monthly, Bi-monthly Amendment, Registration, or Registration Amendment). Lobbying Activities can be modified—added or removed—on a Bi-monthly Report. (**NOTE**: changes to this section do not require a Registration Amendment.)

The ***actual*** Lobbying Activities that occurred during the specific reporting period must be disclosed by identifying the Focus Type, the Focus (Identifying Number or Description), the Type of Communication, and the Party(ies) Lobbied.

You can select the check-box to indicate you did **NOT** engage in any Reportable **"Lobbying Activity"** during the specified reporting period.

1. **Level of Government**

   The **'Level of Government'** lobbied – State lobbying, Municipal ("local") Lobbying or both

2. **Focuses**

   The government activity on which Reportable **"Lobbying Activity"** occurred, which shall include the following, as known at the time of filing:

   - bill, rule, regulation, rate number or brief description relative to the introduction or intended introduction of legislation or a resolution;
   - the title and identifying numbers of Procurement Contracts/documents or a general description of the Procurement;
   - the number or subject matter of an Executive Order of the Governor or Municipality; and
   - the subject matter of and tribes involved in tribal-state compacts.

   Government Bodies available in drop-down menu:

   - Senate Committee
   - Assembly Committee
   - State Agency
   - NYS Assembly
   - NYS Senate
   - Executive Chamber

- NYS School Districts
- State and Local Public Authorities and Local Development Corporations
- Industrial Development Agency
- Village
- Town
- City
- County
- Improvement/Special Districts
  - → County Special District
  - → Town Special District
  - → Consolidated Health District
  - → Fire District
  - → Independent Special District

3. Type of Communication

A *Type of Communication* (Direct, Grassroots Lobbying or Both)* must be assigned from the drop-down menu for each Focus number (such as the bill or procurement number), or brief description of the Focus area if the identifying number is unknown.

- **Direct Lobbying**
  Direct Lobbying is an attempt to influence a Lobbying Activity through Direct or Preliminary Contact with a Public Official, or through communication or interaction directed to a Public Official, or the Public Official's staff.

  If 'Direct Lobbying' is selected, you must disclose the name(s) of the **'Party(ies) Lobbied'** for that specific Focus.

- **Grassroots Lobbying**
  Grassroots Lobbying is an attempt to influence a Public Official indirectly, or through a person or organization who solicits another to deliver a message to a Public Official.

  If 'Grassroots Lobbying' is selected, you must disclose the **'Government Body(ies)'** (State Agencies, Municipalities, or Legislative Bodies) Lobbied for that specific Focus.

- **Both (Direct and Grassroots Lobbying)**
  If both 'Direct' and 'Grassroots Lobbying' is selected, you must disclose the names of the **'Government Body(ies)'** and **'Party(ies) Lobbied**' for that specific Focus.

- **Monitoring Only**
  If you have Lobbying Activity to report, **but have not actually Lobbied a specific Party**, you may select the **'Monitoring Only'** check box once the Focus has been added to your **'My Selected Focuses'** section.

4. Parties Lobbied*

The target(s) of the Reportable **"Lobbying Activity"**, including the person, organization, entity, or legislative body before which the Lobbyist Lobbied.

The direct connection (one-to-one relationship) between the Focus and the target(s) (referred to as 'Parties Lobbied') of any reportable **"Lobbying Activity"** must be identified.

IF you sent a communication to either or both Houses of the Legislature regarding a specific Focus, the following options are available on a Bi-monthly Report in the **'Party'** field (so you do not have to select every Senator/Assembly person):

- A communication sent to entire Senate
- A communication sent to entire Assembly
- A communication sent to entire Legislature

Please see **EXAMPLES** below of 'how' to disclose a Party ***IF*** a specific title and/or name of a Public Official, Public Official's office, or unit/department within an agency is not found in JCOPE's list:

A. EXAMPLE:

If you met with the Commissioner of Taxation and Finance, you would:

1. Select the **'Click here to add Party Name if not found'** hyperlink
2. Select **'State Agency'** from the **'Government Body'** drop-down menu
3. Enter **'Taxation and Finance, Commissioner'** in the **'Party Name'** field

B. EXAMPLE:

If you met with a staff member of the Office of Real Property Tax Services, you would:

1. Select the **'Click here to add Party Name if not found'** hyperlink
2. Select **'State Agency'** from the **'Government Body'** drop-down menu
3. Enter **'Office of Real Property Tax Services, XXX' (unit or department within the agency the staff member represents)** in the **'Party Name'** field

C. EXAMPLE:

If you met with a staff member of a State Senator, or staff member of a legislative committee, you would:

1. Select the **'Click here to add Party Name if not found'** hyperlink
2. Select **'Senate'** from the **'Government Body'** drop-down menu
3. Enter **'Senator Smith, staff member'** or **'Senate Rules Committee, staff member' (as applicable)** in the **'Party Name'** field

D. EXAMPLE:

If you met with a staff member of a local Mayor's office, you would:

1. Select the **'Click here to add Party Name if not found'** hyperlink

2. Select **'City'** from the **'Government Body'** drop-down menu
3. Enter **'Mayor of (Insert City Name), staff person' (or unit or department within the City the staff member represents)** in the **'Party Name'** field

NOTE: Once you have assigned/identified the direct connection (one-to-one relationship) between the **'Focuses'** and the target(s) of the Lobbying Activity **('Parties Lobbied')**, *you* **MUST** select the **'Add'** button underneath the **'Preview'** box to actually *add* the selections to your Bi-monthly Report ***(see How to File: Lobbyist Bi-monthly Report Online Instructions)***.

Attestation Information*

An Attestation is required before any Filing can be submitted. By attesting, the Filer acknowledges that the information (provided by the Filer) in all statements and reports required under Legislative Law Article 1-A is true, correct and complete to the best knowledge and belief of the signor under penalty of perjury. (See Section 1-p of the Lobbying Act)

BI-MONTHLY AMENDMENTS — WHEN TO FILE

Lobbyists are required to submit an Amended Bi-monthly Report for any change, permanent or temporary, to the following information during the specified reporting period, which should be completed and submitted to the Commission **within 10 days of such change**.

Each Amended Bi-monthly Report requires the Filer to provide a specific date the change(s) are (or will be) effective; known as an **"Effective Date of Change"**. Multiple changes can be made on an Amended Bi-monthly Report **as long as all the changes being made on the Filing have the same Effective Date of Change**. Otherwise, separate Amendments are required for each Effective Date of Change.

Amended Bi-monthly Reports can be submitted at any time during the biennial period regardless of whether the original Bi-monthly Report or other Amended Bi-monthly Reports are pending, as long as the "**Effective Date of Change**" is within the same biennial period as the Bi-monthly Report being amended.

Amended Bi-monthly Report Effective Date*

An Amended Bi-monthly Report **"Effective Date of Change**" is the date a specific change (or changes) takes effect; **not the date the Amendment is submitted.**

An Amended Bi-monthly Report can be completed and filed *after* a **Termination End Date**, as long as the contract was "active" during the reporting period of the Bi-monthly being amended.

All information will pre-populate from your Profile and most recently submitted Bi-monthly Report, Amended Bi-monthly Report.

An Amended Bi-monthly Report is required to reflect any changes to:

1. **Individual Lobbyists**

You are required to submit an Amended Bi-monthly Report if the name(s) of any Individual Lobbyist(s) that performed Lobbying Activities on behalf of the Principal Lobbyist for the benefit of the Client changes during the specific Bi-monthly reporting period.

You can also add *new* Individual Lobbyists directly to a Bi-monthly Amendment (***Individuals who were NOT previously listed on the Organization's Profile***). This *new* Individual Lobbyist will be immediately available for selection on other Filings and will be added to the list of Individual Lobbyists contained in your Organization's Profile as well.

NOTE: An Amendment to add a *new* Individual Lobbyist requires **two** Effective Dates.

Individual Lobbyist Effective Date

The Individual Lobbyist's "**Effective Date**" is the earliest date that Individual was authorized to engage in Lobbying Activities for the Principal Lobbyist on behalf of at least one of the organization's clients. The date is used to determine that Individual's online ethics training requirement.

Amendment Effective Date of Change

The Amendment **"Effective Date of Change"** is the date that Individual was authorized to engage in Lobbying Activities for the Principal Lobbyist on behalf of the Contractual Client/Beneficial Client pairing.

If the *new* Individual Lobbyist is lobbying as a board member, director or officer of the Principal Lobbyist, select the **'Designated Lobbyist'** check-box.

You can remove an Individual Lobbyist inadvertently listed on your Amended Bi-monthly Report.

NOTES:

- Any Individuals removed from a Filing will still be available through the list of the Individual Lobbyists contained in your Organization's Profile.
- At least one Individual Lobbyist must be listed on any Filing where "Direct Lobbying" is indicated as the Type of Lobbying Activity.

2. **Identities of other 'Parties' to the Lobbying Activity**

Changes (additions/deletions) of Co-Lobbyists, Sub-Lobbyists, or Beneficial Clients; including Coalition members exceeding the $5,000 Threshold in Lobbying Compensation and Expenses are permitted on an Amended Bi-monthly Report. **NOTE**: At least one Contractual Client and one Beneficial Client must be listed on a Bi-monthly Report and an Amended Bi-monthly Report.

- If your relationship with a Co- and/or Sub-Lobbyist was not already disclosed on your current Biennial Registration, you are required to submit an Amended Statement of Registration to disclose such information and provide a revised Agreement/Contract.

- If a relationship with Co-Lobbyists and/or Sub-Lobbyists changes, a Principal Lobbyist must submit a Registration Amendment to:
    1. remove a Co- and/or Sub-Lobbyist*.
    2. provide a revised Agreement/Contract.

  NOTE: The Co- or Sub-Lobbyist removed from the Principal Lobbyist's Registration may be required to submit a Termination.

- You may add *new* Beneficial Client(s) directly to an Amended Bi-monthly Report. LA will also ask you if there are any other Filings you would like to add the *new* Beneficial Client(s) to; which will populate Amendments to those Filings.

3. Amounts and/or information relating to:

- Compensation
- Expenses
- Reimbursed Expenses
- Coalition Member Contributions

  NOTE: Any decision to waive, write down or otherwise reduce Compensation and Expenses owed to the Lobbyist by the Client after the Contract Termination of the Lobbying Agreement does **not** require an Amendment.

4. Lobbying Activities

Since the Bi-monthly Report requires disclosure of the ***actual*** Lobbying Activities that occurred during the specific reporting period – including the direct relationships that exist between a Focus and Party(ies) Lobbied, **an Amended Bi-monthly Report is required if any of the information reported in the original Bi-monthly Report was inaccurate or changes**.

TICKETING IN THE NEW LOBBYING APPLICATION

The new Lobbying Application provides for a mechanism of communication between the Filer and JCOPE staff, facilitating filing issue awareness and deficiency resolution through a system of Ticketing. Tickets may be generated by Staff to address a specific issue, or in some cases, auto-generated by the Lobbying Application. Tickets will appear on your dashboard in the LA.

APPENDIX A

LOBBYING SUBJECTS

Refer to JCOPE's website for the most up-to-date list.

Agribusiness – General

Agribusiness – Agricultural Services & Products

Agribusiness – Food Processing & Sales

Agribusiness – Tobacco

Budget/Appropriations

Chemicals/Chemical Industry

Construction – general

Construction – Building Materials & Equipment

Construction – Construction Services

Consumer Issues/Safety/Protection

Criminal Justice – General

Criminal Justice – Criminal Law & Procedures (includes sentencing)

Criminal Justice – Law Enforcement

Criminal Justice – Police Issues

Corrections

Economic Development – general

Economic Development – Tourism

Economic Development – Sports/Entertainment

Economic Development – Tax Incentives

Education – General

Education – Testing

Education – Funding

Education – Charter Schools

Education – Evaluations

Energy & Natural Resources – general

Energy & Natural Resources– Alternative Energy Production & Services

Energy & Natural Resources – Oil/Fuel/Gas

Energy & Natural Resources – Waste Management

Energy & Natural Resources – Environmental Conservation/Preservation

Energy & Natural Resources – Parks & Recreational Activities

Ethics including Lobby Reg.

Finance, Insurance & Financial Services – general

Finance, Insurance & Financial Services – Commercial Banks & Credit Unions

Finance, Insurance & Financial Services – Finance & Credit Companies

Finance, Insurance & Financial Services – Mortgage Finance

Finance, Insurance & Financial Services – Securities & Investment

Gaming – General

Gaming – Casinos

Gaming – Horse Racing

Gaming – Lottery

Gaming – Recreation & Live Entertainment

Health – General

Health – Health Professions

Health – Health Services / HMOs

Health – Hospitals & Nursing Homes

Health – Pharmaceuticals/ Health Products

Health – Medicine/ Medicaid

Health – Cigarette/ Tobacco

Human Rights/Civil Rights

Insurance – General

Insurance – Auto

Insurance – Health

Insurance – Life

Insurance – Property & Casualty

Labor – General

Labor - Labor Issues/ Unions

Labor – Prevailing wage/ Minimum Wage

Labor – Pensions/ Retirement

Media – General

Media – Printing & Publishing

Media – Books, Magazines & Newspapers

Media – Motion Picture/Television/Recorded Music/Music Production & Distribution

Media – First Amendment – Press

Miscellaneous Business – General

Miscellaneous Business – Advertising/ Public Relations

Public Utilities – General

Public Utilities – Telecommunications

Public Utilities – Cable/Broadband

Public Utilities – Water

Public Utilities – Gas

Public Utilities – Electric

Real Estate – General

Real Estate – Affordable Housing

Real Estate – Construction

Tax – General

Tax – Corporate

Tax – Exempt Organizations

Tax – Personal Income

Tax – Real Property

Tax – School

Tax – Development Credits

Transportation – General

Transportation– Railroad/Canals

Transportation – Safety

Transportation – Trucking

Transportation – Air Transport

Transportation – Automotive Industry/ Manufacturers

Veterans Affairs