

How to File a Lobbyist Bi-monthly Report

Please refer to the Tool Tip icons  located throughout the Filing for more detailed information.

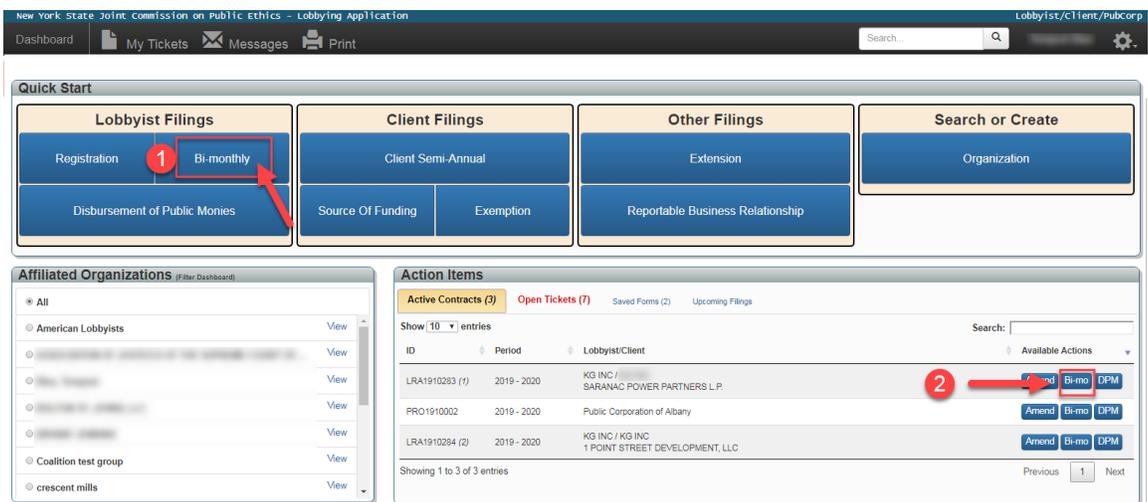
To create a Bi-monthly Report:

There are two different options available on a Filer's Dashboard to create a Bi-monthly Report:

1. Select the **'Bi-monthly'** button from the **'Lobbyist Filings'** quick start menu;
 - a. This method requires you manually select the Principal Lobbyist, Contractual Client and Beneficial Client(s).

OR

2. From the **'Action Items'** window, select the **'Bi-mo'** button that corresponds to the applicable Lobbyist/Client pairing you want to file a Bi-monthly Report for.
 - a. This method avoids having to manually select the Lobbyist/Contractual Client/Beneficial Client information.



The screenshot displays the 'New York State Joint Commission on Public Ethics - Lobbying Application' dashboard. The 'Quick Start' section is divided into four main areas: 'Lobbyist Filings', 'Client Filings', 'Other Filings', and 'Search or Create'. Under 'Lobbyist Filings', there are buttons for 'Registration', 'Bi-monthly', and 'Disbursement of Public Monies'. A red box highlights the 'Bi-monthly' button, with a red arrow pointing to it and a red circle containing the number '1'. The 'Action Items' section shows a table of active contracts with columns for ID, Period, and Lobbyist/Client. The table contains three entries. For the first entry, 'LRA1910283 (1)', the 'Available Actions' column includes buttons for 'Amend', 'Bi-mo', and 'DPM'. A red box highlights the 'Bi-mo' button, with a red arrow pointing to it and a red circle containing the number '2'.

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

Biennial Period

You can select a different Biennial Registration Period from the drop-down menu. Bi-monthly Reports that are available for the corresponding Biennial Registration Period are selectable.

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Bi-monthly Year/Period*

1. Select the **'Start'** button or select the **'Saved, Not Submitted'** hyperlink next to the corresponding Bi-monthly Year/Period.

The screenshot shows a web interface for filing Bi-monthly Reports. At the top, there is a 'Year' dropdown menu set to '2019 - 2020'. Below this is a table with columns for 'Period', 'Start/View Form', and 'Submitted Date'. The 'Submitted Date' column has a red circle around the date '05/02/2019'. The 'Start/View Form' column contains buttons: a blue 'Start' button for the 2019 March - April period, and a grey 'Start' button for the 2019 May - June period. The 2019 May - June row is labeled 'Saved, NOT SUBMITTED' and has a red arrow pointing to it. Other rows for 2019 and 2020 have grey 'Start' buttons. A red arrow also points to the blue 'Start' button for the 2019 March - April period.

Year	Period	Start/View Form	Submitted Date
2019 - 2020	2019 January - February	Submitted	
	2019 March - April	Start	05/02/2019
	2019 May - June	Saved, NOT SUBMITTED	
	2019 July - August	Start	
	2019 September - October	Start	
	2019 November - December	Start	
	2020 January - February	Start	
	2020 March - April	Start	
	2020 May - June	Start	
	2020 July - August	Start	
	2020 September - October	Start	
	2020 November - December	Start	

NOTE: You can also view the date(s) you submitted other Bi-monthly Reports on this screen.

Review*

Before you proceed, verify the Biennial Period, the Reporting Period, the name of the Principal Lobbyist, the Contractual Client(s), and Beneficial Client(s) are correct. You **cannot** change the Contractual information, Biennial Period or Reporting Period once you begin the Bi-monthly Report. If either are incorrect, you will be required to discard the form and begin a new Bi-monthly Report.

Review each tab carefully.

NOTE: Depending on your unique circumstances, **not all tabs** may apply to your specific lobbying arrangement.

The online Bi-monthly Report form 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.

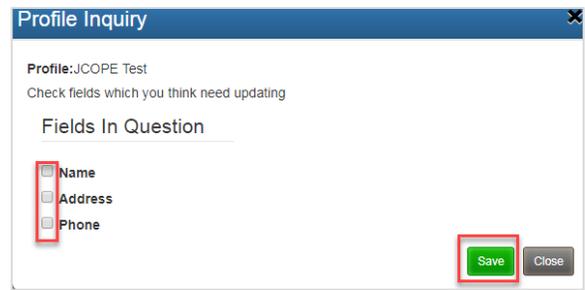
To navigate the Bi-monthly Report:

- (a) Click any of the menu items (tabs) from the navigation menu on the left side of the screen;
- (b) Click the *left* or *right* arrows at the upper right side of your screen; or
- (c) Click the **Continue** → hyperlink at the bottom of your screen.

Profile Inquiry

If the Contractual Client name and/or contact information appears inaccurate to you, select the *exclamation point* symbol in the Contractual Client box. Check the field(s) you think are incorrect/inaccurate and click **'Save'** when done. JCOPE will be alerted that the current Contractual Client information may require a Profile Update.

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Co/Sub-Lobbyist(s) Information (if applicable)

Data disclosed on your corresponding Registration of the applicable Lobbying/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.)

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.

To add a new Co- and/or Sub-Lobbyist

1. On the ***Co/Sub Lobbyist(s)*** tab, either:
 - (a) enter the first few characters of the name in the text search box
- OR**
- (b) Select the '**Click here to create [applicable] Profile that does not exist yet**' hyperlink

When adding a Co- and/or Sub-Lobbyist to your Bi-monthly Report, you may be required to provide the following information if a verified Profile does not yet exist in LA:

1. Co- and/or Sub-Lobbyist Name

The **Name** (including Coalitions and Public Corporations)

2. Business Address, Phone Number, Email Address

The address, phone number, and email address of the organization's place of business.

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3. 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 **Co- and/or Sub-Lobbyist**, as well as their business title, address, phone number, and email address.

A Co- or Sub-Lobbyist that has been successfully added to a Filing is displayed below the **'Co-Lobbyists Added'** or **'Sub-Lobbyists Added'** column headings.

The screenshot shows the 'Lobbyist Bi-monthly' interface for the reporting period of 2019 January - February. The main content area is titled 'Co/Sub Lobbyist(s) Information (if applicable)'. It is divided into two sections: 'Co-Lobbyists' and 'Sub-Lobbyists'. Each section has a search box labeled 'Add Co-Lobbyist Search' and 'Add Sub-Lobbyist Search' respectively, with a red arrow pointing to each. Below the search boxes are links to create profiles that do not exist yet. The 'Co-Lobbyists Added' section displays a list of added organizations, with a red box highlighting a red and white circle 'X' icon next to the first entry. The 'Sub-Lobbyists Added' section is currently empty. A 'Continue' button is located at the bottom left of the interface.

To remove a Co- and/or Sub-Lobbyist

1. On the **Co/Sub Lobbyist(s)** tab, select the red and white circle **'X'** icon.

NOTE: 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.

Review Beneficial Client(s)

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

On this tab, you may add new **or** remove currently listed Beneficial Client(s) directly to your Bi-monthly Report. **NOTE:** Each Bi-monthly Report must identify both Contractual and Beneficial Client(s).

To add a 'Beneficial Client'

1. On the **Beneficial Client(s)** tab, either:
 - (a) enter the first few characters of the **'Beneficial Client'** name in the text search box;

OR

 - (b) type the asterisk symbol (*) in the search field to view a list Organizations with existing Profiles in LA

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The screenshot shows the 'Beneficial Client(s)' section of the reporting interface. A search box is highlighted with a red arrow. Below it, a table shows a search result for 'Test Organization' with a green checkmark in the right column.

Beneficial Clients Added	
Test Organization 890 KG Street Test City, NY 12202 United States p.+1 518-555-5555 e.bri.mctester@g123.com	✓

- (c) If multiple versions of the Organization name appear in the drop down, select the version that has a green check-mark next to it. The green check-mark indicates the Profile has been verified by an authorized person. If none of the names have a green check-mark, please contact [JCOPE Help Desk](#).

The screenshot shows the search dropdown menu with several entries. The entries are: 'test', 'TEST CLIENT', 'TEST -PC', 'TEST ONE', 'test orphan', 'test pc', 'TESTCOM, INC.', 'Testing', 'TESTING 3', 'testing', and 'testing testing'. Green checkmarks are visible next to 'TEST CLIENT', 'TEST -PC', 'TESTING 3', and 'testing testing'.

If a Profile does not yet exist for the 'Beneficial Client'

- On the **Beneficial Client(s)** tab: select the **'Click here to create Beneficial Client Profile that does not exist yet'** hyperlink, and provide the following information:
 - a. **Type of Lobbying Organization**
Lobbyist/Client Organization, Public Corporation, or Coalitions
 - b. **Beneficial Client Name**
The Organization Name (including Coalitions and Public Corporations)
 - c. **Beneficial Client Business Address, Phone Number, Email Address**
The address, phone number, and email address of the Contractual Client's place of business.
 - d. **Beneficial Client Responsible Party (Chief Administrative Officer)**
You will 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 Contractual Client, as well as their business title, address, phone number, and email address.

★ **Repeat these steps for each Beneficial Client required to be listed on your Bi-monthly Report.**

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- Select the 'Create' button to save your changes. **NOTE:** All fields denoted with a red asterisk (*) are required fields.

Create Profile

Lobbyist/Client Organization Public Corp Coalition

*Name
[Text Field]

*Business Street Address [Text Field] Street 2 (apartment, suite, floor, etc.) [Text Field]

*City [Text Field] State [Dropdown: New York] *Zip [Text Field] Country [Dropdown: United States]

*Business Phone [Text Field: +1] Ext [Text Field]

*Email [Text Field]

Responsible Party Contact Information

*Last Name [Text Field] *First Name [Text Field] Middle Name [Text Field]

*Title [Text Field] *Business Phone [Text Field: +1] *Email [Text Field]

Create **Close**

To remove or modify a 'Beneficial Client'

1. On the **Beneficial Client(s)** tab, select the red and white circle 'X' icon.

NOTE: You can only remove a Beneficial Client if you have an active Registration with multiple Beneficial Clients listed since at least one Beneficial Client must be listed on a Bi-Monthly filing

2. If you are an authorized person, you can amend your 'Beneficial Client' information by selecting the 'pencil' icon in the Action column.

Lobbyist Bi-monthly Reporting Period: 2019 January - February Full View

Beneficial Client(s)

Add Beneficial Client Search Enter Client Name or Type * to View list

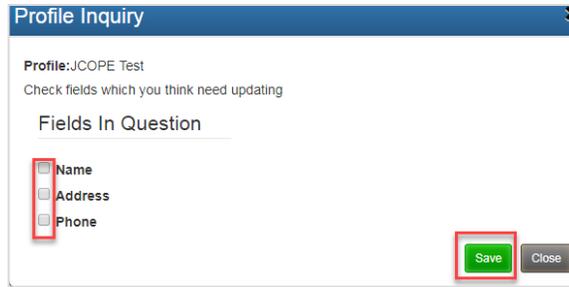
Click here to create Beneficial Client Profile that does not exist yet

Beneficial Clients Added					
		Test Organization	540 Broadway	Albany, NY 12207	United States
		ph: +1 518-555-5555	e: br.mcteester@g123.com		

Continue

3. If the Beneficial Client name and/or contact information appears inaccurate to you, select the *exclamation point* symbol. Check the field(s) you think are incorrect/inaccurate and click 'Save' when done. JCOPE will be alerted that the current Beneficial Client information may require a Profile Update.

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NOTE: Removal of a **Beneficial Client** does **NOT** create an Amendment and/or Termination. Removing a **Beneficial Client** from a 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.

Individual Lobbyist(s) Information (FKA Additional Lobbyists or In-House Lobbyists)

Data disclosed on your corresponding Registration of the applicable Lobbying/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.

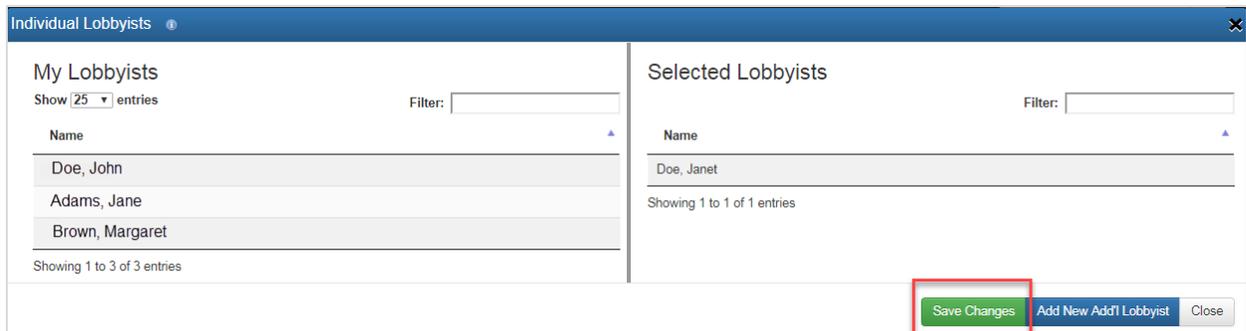
Individual Lobbyist(s) included in your Organization Profile do **NOT** automatically populate to your Bi-monthly Report; however, those Individuals are available to add.

To add an 'Individual Lobbyist' from the names already listed in your Organization Profile

1. On the **Individual Lobbyist(s)** tab, select the **'Modify'** button.



2. Your Individual Lobbyist(s) added through your Organization Profile will display on the left-side of your screen – labeled **"My Lobbyists"**



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3. Select the **name of the Individual** you want to add to your Bi-monthly Report
 - Once selected, the Individual Lobbyist(s) will be added to the right-side of your screen – labeled “**Selected Lobbyists**”
4. Select the ‘**Save Changes**’ button
5. If the Individual Lobbyist is lobbying as a board member, director or officer of the Principal Lobbyist, select the ‘**Designated Lobbyist**’ check-box.

Name	Phone	Email	Designated	Modify
Boden, Corey	+1 519-555-5555	Corey.Boden@gmail.com	<input checked="" type="checkbox"/>	Modify
Jones, Jennifer	+1 555-555-5555	Jennifer.Jones@testfler.com	<input type="checkbox"/>	Modify

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

To add a NEW Individual Lobbyist (Individual is NOT listed in your Organization Profile)

1. On the ‘**Individual Lobbyists**’ tab, select the ‘**Modify**’ button
2. Select the ‘**Add New Individual Lobbyist**’ button
3. Enter the required contact information (denoted by a red asterisk)
4. Provide an ‘**Effective Date**’*

➤ **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. This date can be before the 2019-2020 biennial period.

Individual Lobbyists

*Last Name

*First Name Middle Name Suffix

*Email

*Business Phone Ext

*Effective Date

Add Manage Lobbyists Close

5. Select the ‘**Add**’ button.
6. Select the ‘**Close**’ button

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7. If any of this information matches the name and contact information of Individuals who already have existing Profiles in LA, the information will display to you. Carefully review each name/information, and if the name of the Individual Lobbyist you are attempting to add is listed (already has an existing Profile):

- Select the **'Add Lobbyist'** button.
- Otherwise, select the **'None Match'** button to create a new Profile for the Individual Lobbyist you are attempting to add. 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.

The screenshot shows a dialog box titled "Individual Lobbyists" with a list of individuals. Each entry includes a name, phone number, and email address, followed by a green "Add Lobbyist" button. The entry for Janet Doe is highlighted with a red box. At the bottom of the dialog, there are two buttons: "None Match" (highlighted with a red arrow) and "Back".

8. Select the **'Save Changes'** button

The screenshot shows the "Individual Lobbyists" dialog box with two columns: "My Lobbyists" and "Selected Lobbyists". The "My Lobbyists" column shows a list of names: Doe, John; Adams, Jane; Brown, Margaret. The "Selected Lobbyists" column shows a list of names: Doe, Janet. At the bottom right, the "Save Changes" button is highlighted with a red box.

9. You will be asked if you would like to add this *new* Individual to any of your other Filings.

- a. Select the *new* Individual name
- b. Select the **'Look for Filings'** button

The screenshot shows a dialog box titled "Update Additional Filings" with a list of individuals. The entry "Individual Lobbyist 1" is checked with a red box. At the bottom, the "Look For Filings" button is highlighted with a red box.

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- c. If you have other Filings in LA, they will be displayed. Select those you wish to update with the *new* Individual name, and click **'Submit'** to complete the process
- d. If you have no other Filings, select the **'Check if not updating Filings'** check-box, and click **'Submit'**

To remove an Individual Lobbyist listed on your Bi-monthly Report

1. On the **'Individual Lobbyists'** tab, select the **'Modify'** button
2. Select the name of the Individual Lobbyist you want to remove from the right-side of your screen – labeled **'Selected Lobbyists'**
 - Once selected, your Individual Lobbyist is immediately removed from the Filing, but will still display on the left-side of your screen – labeled **"My Lobbyists"**
3. Click **'Save changes'**

NOTE: Any Individuals removed from a Bi-monthly Report will still be available through the list of the Individual Lobbyists contained in your Organization's Profile.

Compensation and Expense Amounts for Bi-monthly Reporting Period*

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

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

a. Compensation

Select **'Yes'** or **'No'** from the drop-down menu to indicate whether or not you have **'Compensation to Report'**.

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- If you select 'Yes', you must provide the Total (Dollar Amount) of Compensation of ALL Individual Lobbyists for the current Bi-monthly reporting period in the 'Compensation (Current Period Only)' text box.

b. Reimbursed Expense(s)

Select 'Yes' or 'No' from the drop-down menu to indicate whether or not you have 'Reimbursed Expenses to Report'.

- If you select 'Yes', you must provide the Total (Dollar Amount) of Reimbursed Expenses for the current Bi-monthly reporting period in the 'Reimbursed Expenses (Current Period Only)' text box. (The total dollar amount of Reimbursed Expenses received from the Client.)

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

The screenshot shows the 'Lobbyist Bi-monthly' report interface for the reporting period of 2019 January - February. The left sidebar contains navigation tabs: Co/Sub Lobbyists, Beneficial Clients, Individual Lobbyists, **Comp & Expenses**, Other Lobbying Expenses, Lobbying Subjects, Lobbying Activities, and Attestation. The main content area is titled 'Summary of Compensation and Reimbursed Expenses for this period'. It includes a table for 'Lobbying Agreement Compensation (Read only)' with columns for Duration and Compensation. Below the table are two rows of dropdown menus for 'Compensation to Report' and 'Reimbursed Expenses to Report', each with a corresponding text input field for the amount. The 'Continue' button is at the bottom left.

2. Other Lobbying Expenses sub-tab

c. Expenses

Disclose Reportable Expense information in the 'Report in the aggregate all expenses less than or equal to \$75' field.

- If you have none to disclose for this reporting period, you may leave the '0' and proceed to the next required field.

The screenshot shows the 'Other Lobbying Expenses (Current Period Only)' section of the report. It includes three input fields for aggregate expenses: 'Report in the aggregate all expenses less than Or equal to \$75' (with a red arrow pointing to the input), 'Report in the aggregate all expenses for salaries of non-lobbying employees' (with a red arrow pointing to the input), and 'Report in the aggregate all itemized expenses exceeding \$75'. A checkbox is present for 'check here if you have no itemized expenses to report for this period'. Below these are two tables for itemized expenses: one for general expenses with columns 'Paid To', 'Amount', 'Date', and 'Purpose', and another for 'Coalition Member Contribution'. The 'Total Expenses' field shows a value of \$4,000. The 'Continue' button is at the bottom left.

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NOTE: If you report '0':

- The Reimbursed Expense Total must be \$0, and
- No other Expenses can be listed on the Bi-monthly Report

Disclose salaries of non-lobbying employees' in the **'Report in the aggregate all expenses for salaries of non-lobbying employees'** field.

- If you have none to disclose for this reporting period, you may leave the '0' and proceed to the next required field.

d. Itemized Expenses

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

- Disclosure of **'Itemized Expenses, each valued at more than \$75'** requires the following information be provided:

1. **Name of Organization or Individual** the Expense was paid to (select the corresponding radio button)
2. **Total (Dollar amount) of the Itemized Expense**
3. **Indication if the Expense Amount was reimbursed by the Client**
4. **Date of the Expense** (any date within the Bi-monthly reporting period). Enter by either:

- a. using the green calendar icons, or
- b. enter the dates manually using the mm/dd/yyyy format

5. **Expense Purpose**

- Advertising - Billboards
- Advertising - Flyers
- Advertising - Print Media
- Advertising - Television/Radio
- Buses for lobby event
- Cell Phone
- Computer/Internet
- Consulting
- E-advocacy
- Legislative Bill Tracking
- Photocopies

Itemized Expense

Individual Organization

Expense Paid To
John Doe

Expense Amount
1,500

Expense Reimbursed by Client

Expense Purpose Check if purpose does not exist in list
Advertising - Billboards

*Expense Date (MM/DD/YYYY)

Mar 2019

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Add Add Another Close

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- Rallies
- Rent
- Social Event/Reception/Banquet
- Social Media – Websites
- Travel Reimbursement - Train, Airfare, Car, Hotel
- Other

You can select the **'Check if purpose does not exist in list'** check-box and type an expense purpose in the text field if a specific Expense purpose is not an available option in the pre-populated list.

e. [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 paid to the Organization that is attributed to the individual listed

If the Expense Detail Section requires disclosure of **one Individual**:

- Enter information
- Select the **'Add'** button to save and return to the previous screen.

If the Expense Detail Section requires disclosure of **multiple Individuals**:

- Enter information for one Individual
- Select the **'Add Another'** button to continue.
- Once you have finished, select the **'Add'** button to save and return to the previous screen.

NOTE: 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.)

The screenshot displays the 'Itemized Expense' form. At the top, there are radio buttons for 'Individual' and 'Organization', with 'Organization' selected. Below this are fields for 'Expense Paid To', 'Expense Amount', and a checkbox for 'Expense Reimbursed by Client'. A dropdown menu for 'Expense Purpose' is set to '-- Choose Purpose --', with a checkbox for 'Check if purpose does not exist in list' next to it. An 'Expense Date' field is also present. Below the main form is an 'Expense Detail' pop-up window. This window contains fields for 'Last Name', 'First Name', 'Middle Name', 'Title', 'Amount', and 'Employer'. At the bottom of the 'Expense Detail' window are three buttons: 'Add' (green), 'Add Another' (green), and 'Close' (red).

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SEE *Bi-monthly and Bi-monthly Amendment* Instructions for examples

f. Coalition Member Contributions (if applicable)

1. Select the 'Add' button
2. Enter the 'Name' of the Coalition the Contribution was paid to
3. Enter the Total (Dollar amount of) Contribution paid to Coalition during this period by the specific Coalition Member (Beneficial Client).

Coalition Member Contribution, if applicable ⓘ

*does not apply to a Coalition who opts to file as a Lobbyist or Client

Name	Amount	
<input type="text" value="Coalition in support of Coalitions"/>	<input type="text" value="500"/>	<input type="button" value="Add"/> ⓘ

Lobbying Subjects for Bi-monthly Reporting Period*

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

At least one 'Lobbying Subject' is required to be disclosed on each 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.

You can add or remove 'Subjects' as needed. Multiple Lobbying Subjects can be selected from the drop-down menu. **Refer to JCOPE's website for the most up-to-date list.**

NOTE: Changes/modification to any 'Subject' on your Bi-monthly Report has no impact on the associated Registration Filing.

To add a 'Lobbying Subject'

1. On the **Lobbying Subjects** tab on your Bi-monthly Report:
 - a. enter the first few characters of the 'Subject' in the text search box
- OR**
- b. type the asterisk symbol (*) in the search field to view JCOPE's comprehensive list

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The screenshot shows the 'Lobbyist Bi-monthly' interface for the reporting period of 2019 January - February. The 'Subjects Lobbied' section features a search field with a red arrow pointing to it. Below the search field is a table titled 'Selected Subjects' with two rows: 'Construction - Building Materials & Equipment' and 'Construction - general'. Each row has a red '+' icon in the right column. A 'Continue' button is at the bottom left.

Selected Subjects	
Subjects	
Construction - Building Materials & Equipment	+
Construction - general	+

2. Click-on the 'Subject' to select it.

- You may add multiple 'Subjects'.

The screenshot shows the 'Lobbyist Bi-monthly' interface with a sidebar on the left. The 'Subjects Lobbied' section has a search field with a red arrow pointing to it. Below the search field is a list of subjects, including 'A', 'Agribusiness - Agricultural Services & Products', 'Agribusiness - Food Processing & Sales', 'Agribusiness - general', 'Agribusiness - Tobacco', 'Budget/Appropriations', 'Cannabis/Marijuana', 'Chemicals/Chemical Industry', 'Construction - general', 'Consumer Issues/Safety/Protection', 'Criminal Justice - Criminal Law & Procedures (includes sentencing)', 'Transportation - Trucking', 'Transportation - Air Transport', and 'Veterans Affairs'. Each row has a red '+' icon in the right column. A 'Continue' button is at the bottom left.

- A 'Lobbying Subject' that has been successfully added to a Filing is displayed in the 'Selected Subjects' area below the 'search field'.

The screenshot shows the 'Lobbyist Bi-monthly' interface with the 'Selected Subjects' area highlighted by a red box. The 'Subjects Lobbied' section has a search field. Below the search field is a table titled 'Selected Subjects' with two rows: 'Media - General' and 'Public Utilities - Telecommunications'. Each row has a red '+' icon in the right column. A 'Continue' button is at the bottom left.

Selected Subjects	
Subjects	
Media - General	+
Public Utilities - Telecommunications	+

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To remove a Lobbying Subject

1. On the **Lobbying Subjects** tab on your Bi-monthly Report, select the red and white circle 'X' icon.

Lobbying Subjects ⓘ

Subjects Lobbied

*Search Type * for full list of subjects

Search

Selected Subjects

Subjects
Media - General

Lobbying Activities for Bi-monthly Reporting Period*

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.

Select **'Yes'** or **'No'** from the drop-down menu to indicate whether or not you have **'Lobbying Activities to Report'**.

- If you select **'Yes'**, you must provide the **'Level of Government'**, **'Focuses'** and **'Parties Lobbied'**.
- You can add or remove **'Lobbying Activities'** directly to a Bi-monthly Report.

Lobbyist Bi-monthly Reporting Period: 2019 March - April Full View

Lobbying Activities ⓘ

Do You have Lobbying Activities to Report? Yes No

Type/Level of Government

Level of Government State/Municipal (Both)

State & Municipal Focuses and Parties Lobbied

Show Help

Focuses

- Direct Lobbying (2)
 - 4854854
 - 654646
- Grassroots (1)
 - 6795

Parties Lobbied

- Department of Transportation
- Aging
- Andrea Stewart-Cousins
- Mayor of (Insert City Name), staff person* (or unit or department within th...
- Taxation and Finance, Commissioner

Preview

Focuses Parties

Add

Update

How to file: Lobbyist Bi-Monthly Report Online

Level of Government, Focuses and Parties Lobbied*

a. To add a “Lobbying Focus”

Step 1 – Select the ‘**Level of Government Lobbied**’ from the drop - down menu.

You must indicate the ‘**Level of Government**’ you Lobbied during this reporting period.

- a. State Lobbying
- b. Municipal Lobbying
- c. State/Municipal (Both)

Step 2 – Add ‘**Focuses**’ by selecting the green ‘**Update**’ button.

Focuses disclosed on your corresponding Registration **CAN** be added to your Bi-monthly Report by clicking the green ‘**Update**’ button in the ‘**Focuses**’ box.

The screenshot shows the 'Lobbyist Bi-monthly' interface for the reporting period of 2019 January - February. The 'Level of Government' dropdown menu is highlighted with a red circle and the number 1. The 'Focuses' section has a green 'Update' button highlighted with a red arrow and the number 2. The 'Parties Lobbied' section shows a list of parties, including 'BAGS SOLID WASTE MANAGEMENT DISTRICT (REFUSE)' and 'CityOne!'. A 'Preview' window is also visible, showing a table with columns for 'Focuses' and 'Parties'.

The ‘**Add Lobbying Focuses**’ pop-up window will display. There are two sub-tabs available for selection: ‘**New Focuses**’ and ‘**Focuses from Registration**’. The active sub-tab is indicated by a yellow highlight.

b. To add ‘New Focuses’

1. Confirm the ‘**New Focuses**’ sub-tab is highlighted.

The screenshot shows the 'Add Lobbying Focuses' pop-up window. The 'New Focuses' sub-tab is highlighted in yellow. The 'Type' dropdown menu is set to 'State Bill' and is highlighted with a red box. The 'Communication' dropdown menu is also highlighted with a red box. The 'Focus #' field is empty, and the 'Load Multiple' button is visible. The text 'Add description if identifying number is unknown' is displayed below the 'Focus #' field.

2. Select a ‘**Focus Type**’

How to file: Lobbyist Bi-Monthly Report Online

A *Focus Type* (State or Municipal Level) must be identified for each Focus number (such as the bill or procurement number), or brief description of the Focus area if the identifying number is unknown.

- State Bill
- State Executive Order
- State Law
- State Procurement
- State Resolution
- State Regulation/Rate-making/Rule
- State Tribal Compact Agreement - NYS Indian Nations
- Municipal Bill
- Municipal Executive Order
- Municipal Law
- Municipal Procurement
- Municipal Resolution
- Municipal Regulation/Rate-making-Rule

3. Select a **'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.

NOTE: The 'Government Body' information will populate for you if a Party Name is selected from the drop-down menu.

a. **Monitoring Only**

If you have Focus 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.

1. Select the Focus to add it to the **'Preview'** box. *Do not select a Parties Lobbied.*
2. Select the **'Add'** button underneath the **'Preview'** box.
3. Select the **'Monitoring Only'** check-box next to the Focus in the **'My Selected Focuses'** section.

How to file: Lobbyist Bi-Monthly Report Online

4. Identify Focus(es).

a. Focus Number (identifying number)

- Add a **'Focus #'** and hit the 'Enter' key on your keyboard to save your changes.
- If a Focus Number (identifying number) is **unknown**, you can provide a description of the Focus by selecting the **'Add Description if Identifying Number is unknown'** hyperlink.

SPECIAL FORMATTING REQUIREMENTS FOR STATE BILLS.

Identify Senate and Assembly Bills by entering a capital 'S' for a Senate Bill number, or a capital 'A' for an Assembly Bill number. Do not add a space, hyphen, period, or other character between the capital letter and the bill number.

Correct: A1234 **Incorrect:** a1234; a 1234; A 1234; A_1234

Amended State Bills: If a State bill is amended, versions are denoted by a letter suffix A, B, C, D and so on for each time the bill is altered. Please ensure the letter at the end of the amended Bill number includes a dash before it.

Correct: A1345-A **Incorrect:** a1234A; a 1234a; A 1234a; A_1234A

Any other Types of Focus numbers do not require specific formatting rules for data-entry.

How to file: Lobbyist Bi-Monthly Report Online

b. [Description of the Focus](#)

If a Focus Number (identifying number) is **unknown** at the time of submission of your Filing, you can provide a description of the Focus.

- Select **'Add Description if Identifying Number is unknown'** and provide a brief description; then click the 'Enter' key to add.
- **For Municipal Level Focuses**, indicate the originating locality in your description.

EXAMPLE: Municipal Bill on requiring single stream recycling in the Town of Delmar, New York.

c. [Load Multiple State and Municipal Bills](#)

You can **upload multiple State and Municipal Bill numbers** as long as they are grouped by the same **Type of Communication**.

1. **Organize your bill numbers** into the following categories:

- Direct Lobbying
- Grassroots Lobbying
- Both

2. **Use commas to separate bill numbers.**

- Each bill number must be separated by a comma.
- State Senate Bill numbers and Assembly Bill numbers do NOT need to be loaded separately.

Correct: A1234,S1234,A4567,A8790,S2345

3. **Copy/paste the bill numbers** into the corresponding **Lobbying Focuses** text box.

The screenshot shows a web form titled "Load Multiple Focuses" with a close button (X) in the top right corner. The form is set to "Type: State Bill". It contains three text input fields, each with a placeholder "Enter a list of Focuses separated by comma". The first field, labeled "Direct Lobbying Focuses", contains the text "A1234, S1234". The second field, labeled "Grassroots Lobbying Focuses", contains the text "S4567, S88000". The third field, labeled "Both (Direct/Grassroots) Lobbying Focuses", contains the text "A65488, S39485". At the bottom right of the form, there are two buttons: a green "Process" button and a grey "Back" button. The "Process" button is highlighted with a red rectangular box.

How to file: Lobbyist Bi-Monthly Report Online

4. Click the 'Process' button.

Focuses that have been successfully added will appear in the **'Added Focuses'** section.

- If you accidentally entered a Bill number twice, it will appear in the **'Duplicate Communication Types'** section.
- Any bill number that does not meet the formatting requirements will appear in the **'Invalid Focuses'** section.
 - You can edit these bill numbers on this screen.
 - Correct the bill number and click **'Process'** when completed.

The screenshot shows a window titled "Load Multiple Focuses" with a blue header. Below the header, it says "Type: State Bill". There are three main sections:

- Added Focuses:** A light blue box containing the text "S4567 A9000-A, S6887, A78444, A1234".
- Duplicate Communication Types:** A light blue box containing the text "A1235".
- Invalid Focuses:** A light blue box containing the text "M56787". A red arrow points to this section.

Below these sections are three input fields:

- Direct Lobbying Focuses:** Enter a list of Focuses separated by comma.
- Grassroots Lobbying Focuses:** Enter a list of Focuses separated by comma.
- Both(Direct/Grassroots) Lobbying Focuses:** Enter a list of Focuses separated by comma. This field contains "M56787".

At the bottom right, there are two buttons: "Process" (highlighted with a red box) and "Back".

5. When all corrections are complete:

The Communication Type/Focus pairing will populate to the **'Added Focuses'** section of the main **'Lobbying Focuses'** screen of your Bi-monthly Report.

- An incorrectly identified **Communication Type** can be easily corrected by selecting a new **'Communication'** from the drop-down menu.

d. To remove a bill number or description, click the red and white circle 'X' icon.

The screenshot shows a table titled "My Selected Focuses" with a blue header. Below the header, there are tabs for "All" and "State Bill". The table has columns for "Type", "Identifying No./Description", and "Communication".

Type	Identifying No./Description	Communication
State Bill	S4567	Direct
State Bill	A9000-A	Direct

A red arrow points to the "Direct" dropdown menu in the first row. A red box highlights a red and white circle "X" icon in the right margin of the table, used for removing entries.

e. To add 'Focuses' from the list of Focuses disclosed on your Registration

1. Confirm the **'Focuses from Registration'** sub-tab is highlighted.

How to file: Lobbyist Bi-Monthly Report Online

The screenshot shows the 'Lobbying Focuses' interface. The 'Add Lobbying Focuses' section is active, showing a dropdown for 'Communication' set to 'Direct Lobbying'. Below it, a table lists a focus with ID 'PC68166' and a checked checkbox. A red arrow points to this focus, and a green 'Add to Focuses' button is highlighted. The 'My Selected Focuses' section below is empty, displaying 'No data available in table'. A 'Close' button is located at the bottom right of the window.

2. Select a **'Type of Communication'**
3. Check the box(es) next to the **'Focus identifying number(s)'** you want to associate to the **Type of Communication** selected.
4. Select the **'Add to Focuses'** button to save your changes.
5. **Repeat steps 1 – 3** for each Focus Type assigned to a different **Type of Communication**.
 - To expedite the process, multiple Focuses can be selected at one time.
6. Select the **'Close'** button when you have finished adding Focuses.
7. All Focuses will appear in the main **'Focuses'** box and are grouped by the **Type of Communication**.

NOTE: You are not required to use *every* Focus that was listed on your Registration at one time; you can select only those you lobbied during this specific reporting period. The **'Focuses from Registration'** section will be available on future Bi-monthly Reports until every Focus disclosed on your Registration has been used.

Step 3 – Identify 'Parties Lobbied' by selecting the green **'Update'** button.

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.

Parties disclosed on your corresponding Registration **WILL** be automatically added to the **'Parties Lobbied'** box on your Bi-monthly Report.

NOTE: A Focus does **NOT** require a **'Party'** be connected to it **IF** you did **not actually lobby a specific Party**. You may select the **'Monitoring Only'** check box once the Focus has been added to your **'My Selected Focuses'** section.

How to file: Lobbyist Bi-Monthly Report Online

The screenshot shows the 'Lobbyist Bi-monthly' reporting interface. The 'Parties Lobbied' section is highlighted with a red circle containing the number '3' and a red arrow pointing to the 'Update' button. The interface includes a sidebar with navigation options, a top navigation bar with the reporting period '2019 January - February', and a main content area with sections for 'Focuses' and 'Parties Lobbied'.

f. To add a 'Party Name'

1. On the “**Lobbying Parties**” tab, either:

- enter the first few characters of the ‘**Party Name**’ name in the text search box
or
- type the asterisk symbol (*) in the search field to view JCOPE’s comprehensive list

NOTE: The ‘Government Body’ information will populate for you if a Party Name is selected from JCOPE’s list.

a. **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

b. **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:

1. select the ‘**Click here to add Party Name if not found**’ hyperlink

The screenshot shows the 'Lobbying Parties' window. A red arrow points to the 'Click here to add Party Name if not found' hyperlink. Below the search field is a table titled 'Parties Lobbied' with columns for 'Government Body' and 'Name'. The table contains two rows: 'County Special District' with 'BAGS/SOLID WASTE MANAGEMENT DISTRICT (REFUSE)' and 'City' with 'CityOne'. There are red 'X' icons in the right margin of the table rows. An 'Add' button is highlighted with a red box at the bottom right.

Government Body	Name
County Special District	BAGS/SOLID WASTE MANAGEMENT DISTRICT (REFUSE)
City	CityOne

How to file: Lobbyist Bi-Monthly Report Online

2. select the **'Government Body'** from the drop-down menu
3. enter the **'Party Name'** in the text box
4. click **'Add'** to add one **'Party Name'** (see **EXAMPLES below**)
5. click **'Add Another'** to select another **'Government Body'** and add another **'Party Name'**
6. repeat until all **'Parties'** have been added
7. click **'Back'** to return to the main **'Lobbying Parties'** pop-up window

The screenshot shows a web form titled "New Party Lobbied". It contains a "Government Body" dropdown menu with "Assembly Committee" selected. Below it is a text input field for "*Party Name". At the bottom right, there are three buttons: "Add", "Add Another", and "Back". Red boxes highlight the dropdown arrow, the "Add" button, and the "Add Another" button.

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

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

How to file: Lobbyist Bi-Monthly Report Online

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

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

g. To remove a 'Party'

1. On the **Lobbying Parties** tab, select the red and white circle **'X'** icon.



The screenshot shows a window titled "Lobbying Parties" with a blue header. Below the header is a section "Add Party Lobbied" with a text input field and a link "Click here to add Party Name if not found". Below that is a section "Parties Lobbied" containing a table with two columns: "Government Body" and "Name". The table has three rows: "NYS Legislature" with "A communication sent to entire Legislature", "NYS Senate" with "John J. Bonaio", and "State Agency" with "Office of the Governor". A red circle with a white 'X' is overlaid on the right side of the first row. At the bottom right of the window are "Add" and "Close" buttons.

Government Body	Name
NYS Legislature	A communication sent to entire Legislature
NYS Senate	John J. Bonaio
State Agency	Office of the Governor

Step 4 - Assign/identify the direct connection (one-to-one relationship) between the **'Focuses'** and the target(s) of the **Lobbying Activity ('Parties Lobbied')**

All of your **'Focuses'** and **'Parties Lobbied'** information will display on your screen (see below), and you can now begin to 'connect' the Focus(es) to the Party(ies).

1. Choose a **'Focus'** by selecting the check-box next to the Focus Identifier (number or description).
2. Choose a **'Party Name' (or Names)** by selecting the check-box(es) next to the Name(s) you want to 'connect' to the selected Focus(es).

How to file: Lobbyist Bi-Monthly Report Online

- You may select more than one Party Name *per Focus* by selecting multiple check-boxes.
3. Each *checked* 'Focus' and 'Party(ies) Lobbied' populates to the 'Preview' box for your review.

The screenshot displays the online reporting interface. On the left, the 'Focuses' section has three categories: 'Direct Lobbying (5)' with items E03, PC68166, PKG3434334, S1234, and S234556; 'Grassroots (2)' with items A23455 and S9454958-A; and 'Both (1)' with item CT343435. A red circle '1' is next to the 'Grassroots' category. In the center, the 'Preview' box shows a table with two columns: 'Focuses' and 'Parties'. The first row shows Focuses: A23455 and Parties: A communication sent to entire Sen... OVID-LODI FIRE PROTECTION DI... A red circle '3' is next to the 'Parties' column, and a red box highlights the 'Add' button. On the right, the 'Parties Lobbied' section has items: "BAGS" SOLID WASTE MANAGEMENT DISTRICT (REFUSE), OVID-LODI FIRE PROTECTION DIST. (checked), A communication sent to entire Senate (checked), Alton, and Albany. A red circle '2' is next to the 'A communication sent to entire Senate' item. Below these sections is the 'My Selected Focuses' section, which includes a search bar and a table with columns: Type, Focus, Parties, Communication, and Monitoring Only. The table contains two entries: one for Focus S1234 with 'Albany' parties and 'Direct Lobbying' communication, and another for Focus A23455 with 'A communication sent to entire Senate', 'OVID-LODI FIRE PROTECTION DIST.', and '"BAGS" SOLID WASTE MANAGEMENT DISTRI...' parties and 'Grassroots Lobbying' communication. A red box highlights the 'Monitoring Only' checkbox for the first entry.

- To remove a 'Focus' and/or 'Party(ies) Lobbied' from the 'Preview' box, un-select the check-box next to the *name* in their respective section(s).
4. Select the 'Add' button underneath the 'Preview' box to add your selections to your 'My Selected Focuses' section.
 5. Repeat steps until you have added all 'Focuses' and 'Party(ies) Lobbied' to your 'My Selected Focuses' section for the Bi-monthly reporting period.

NOTE: You **MUST** select the 'Add' button underneath the 'Preview' box to actually *add* the selections to your Bi-monthly Report.

Monitoring Only

If you have Focus 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.

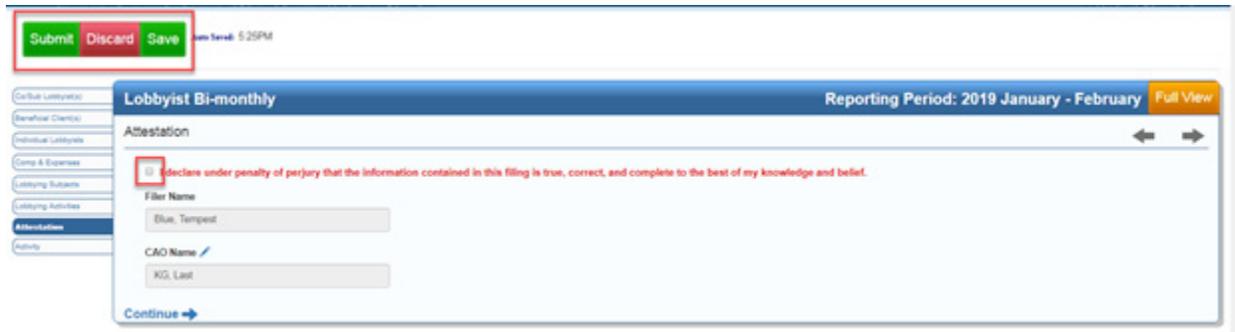
1. Select the Focus to add it to the 'Preview' box. *Do not select a Parties Lobbied.*
2. Select the 'Add' button underneath the 'Preview' box.
3. Select the 'Monitoring Only' check-box next to the Focus in the 'My Selected Focuses' section.

The screenshot shows the 'My Selected Focuses' section. It includes a search bar and a table with columns: Type, Focus, Parties, Communication, and Monitoring Only. The table contains one entry: Type: State Bill, Focus: S1211, Parties: Both, Communication: Both. The 'Monitoring Only' checkbox for this entry is checked and highlighted with a red box. Below the table, it says 'Showing 1 to 1 of 1 entries'. At the bottom, there are 'Previous', '1', and 'Next' navigation buttons, and a 'Continue' button with a right-pointing arrow.

How to file: Lobbyist Bi-Monthly Report Online

Attestation*

1. Check the **'Attestation'** check-box
2. Select the **'Submit'** button.
 - You will then be able to:
 - View the Filing
 - Return to the Dashboard



The screenshot shows the 'Lobbyist Bi-monthly' reporting interface. At the top, there are three buttons: 'Submit' (green), 'Discard' (red), and 'Save' (green). Below these is a navigation menu with options like 'Default Lobbyist', 'Beneficial Clients', 'Individual Lobbyists', 'Comp & Expenses', 'Lobbying Subjects', 'Attestation' (highlighted), and 'Activity'. The main content area is titled 'Lobbyist Bi-monthly' and 'Reporting Period: 2019 January - February'. The 'Attestation' section contains a red-bordered box with a checkbox and the text: 'I 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.' Below this are two text input fields: 'Filer Name' (containing 'Elus, Tempest') and 'CAO Name' (containing 'KG, Last'). A 'Continue' button with a right-pointing arrow is at the bottom left.

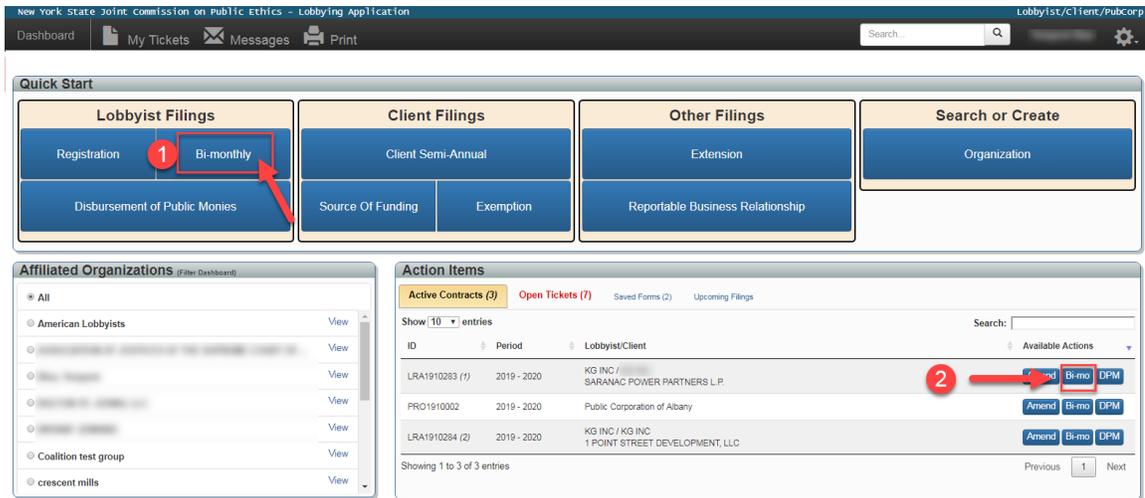
Congratulations you are all done!

How to File an Amended Lobbyist Bi-Monthly Report

To create an Amended Bi-monthly Report:

There are three different options available on a Filer's Dashboard to create an Amended Bi-monthly Report:

1. Select the **'Bi-monthly'** button from the **'Lobbyist Filings'** quick start menu;



OR

2. From the **'Action Items'** window, select the **'Bi-mo'** button that corresponds to the applicable Lobbyist/Client pairing you want to file an Amended Bi-monthly Report for.
 - a. Select the Bi-monthly Report from the list of submitted Bi-monthly Reports.

Year: 2019 - 2020

Period	Start/View Form	Submitted Date
2019 January - February	Submitted	05/03/2019
2019 March - April	Submitted	05/07/2019
2019 May - June	Saved, NOT SUBMITTED	
2019 July - August	Start	
2019 September - October	Start	
2019 November - December	Start	
2020 January - February	Start	
2020 March - April	Start	
2020 May - June	Start	
2020 July - August	Start	
2020 September - October	Start	
2020 November - December	Start	

OR

How to file: Amended Lobbyist Bi-Monthly Report Online

3. Select the Bi-monthly Report from the list of Filings displayed in the *Bi-monthly tab* in the 'All My Filings' window.

ID	Period	Lobbyist	Client	Beneficial Client	Submitted	Status
LBO1915357	2019 - 2020 2019 Mar - Apr	Lobbyist	Contractual Client	Beneficial Client	05/07/2019	Submitted
LBA1910633 (f)	2019 - 2020 2019 Jan - Feb	Lobbyist	Contractual Client	Beneficial Client	05/03/2019	Submitted
19803 (f)	2019 - 2020 2019 May - Jun	Lobbyist	Contractual Client	Beneficial Client		Saved, NOT SUBMITTED

- a. Select the green 'Amend' button at the top of the screen to begin a new Amendment.

Amend

LBA Lobbyist Bi-monthly Amendment Reporting Period: 2019 January - February Full View

Co/Sub Lobbyist(s) Information (if applicable) ⓘ

Co-Lobbyists

Co-Lobbyists Added
No Co-Lobbyists

Sub-Lobbyists

Sub-Lobbyists Added
No Sub-Lobbyists

Filing History

NOTE

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.

- a. **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.**

- b. **Individual Lobbyists**

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

1. **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.

How to file: Amended Lobbyist Bi-Monthly Report Online

2. Amendment Effective Date of Change

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

Use the guidelines outlined above in ‘*How to File a Lobbyist Bi-monthly Report*’ to change/modify information in an Amended Bi-monthly Report.