How to File a Lobbyist Bi-monthly Report

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

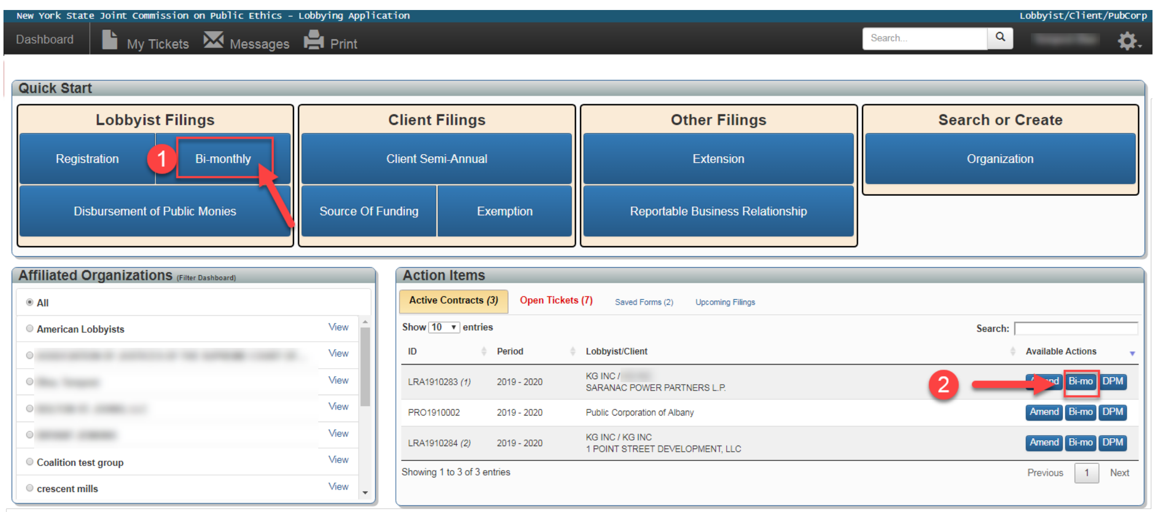
To create a Bi-monthly Report:

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

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).

<u>OR</u>

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

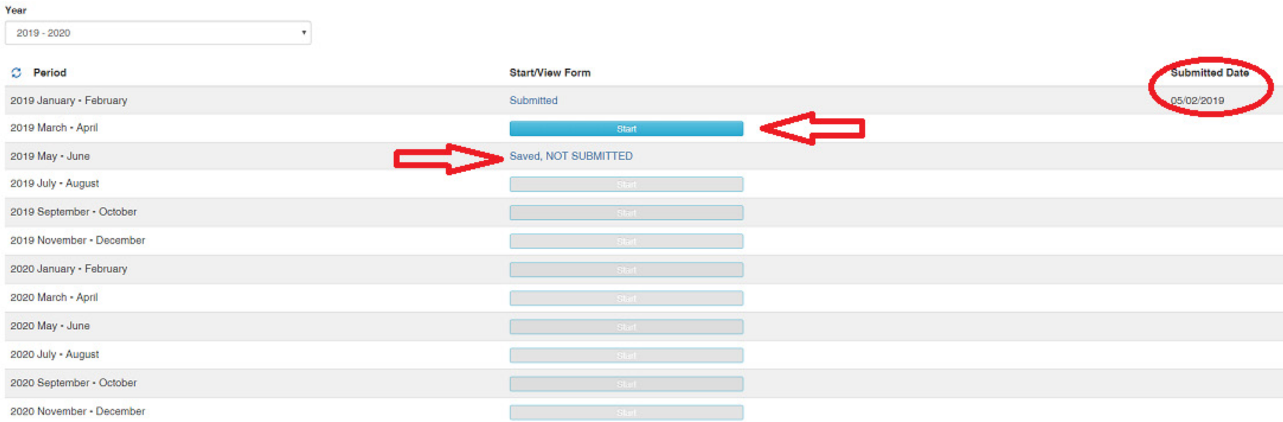
Biennial Period

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.

Revised 5/21/2019

Bi-monthly Year/Period*

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



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.

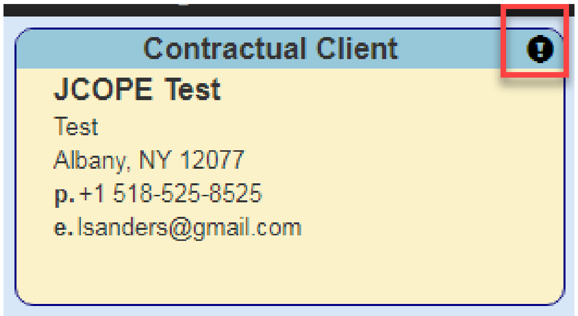
The online Bi-monthly Report form in the new LA contains its own main navigation menu and can be viewed in a "tabbed format" or in "full view", depending on Filer preference.

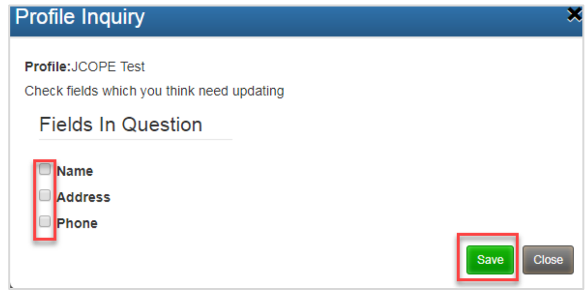
To navigate the Bi-monthly Report:

(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.





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)

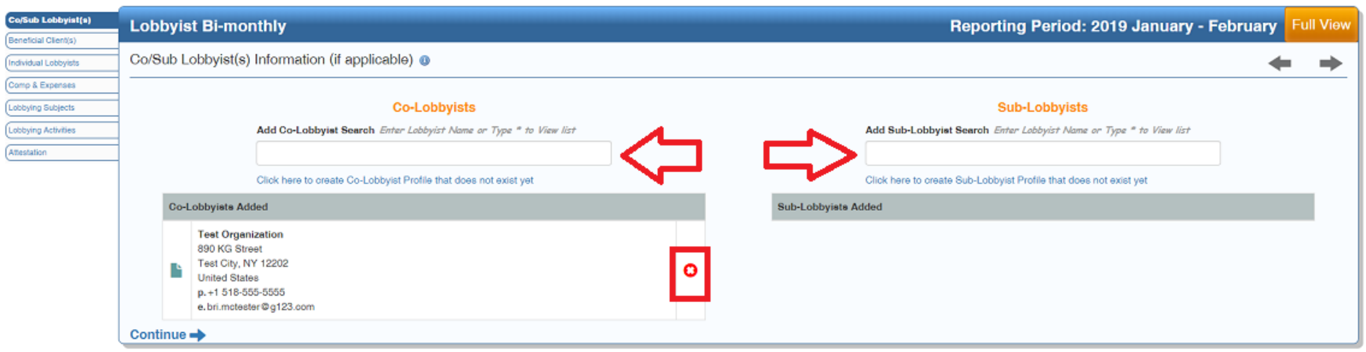
2. Business Address, Phone Number, Email Address

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

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.



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.

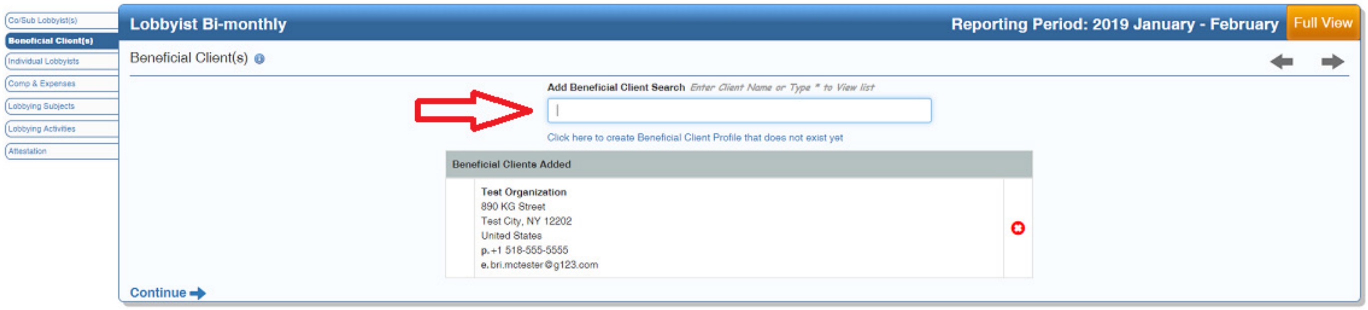
On this tab, you may add new ***or*** remove currently listed Beneficial Client(s) directly to your Bi-monthly Report. **NOTE**: Each Bi-monthly Report must identify both Contractual and Beneficial Client(s).

To add a 'Beneficial Client'

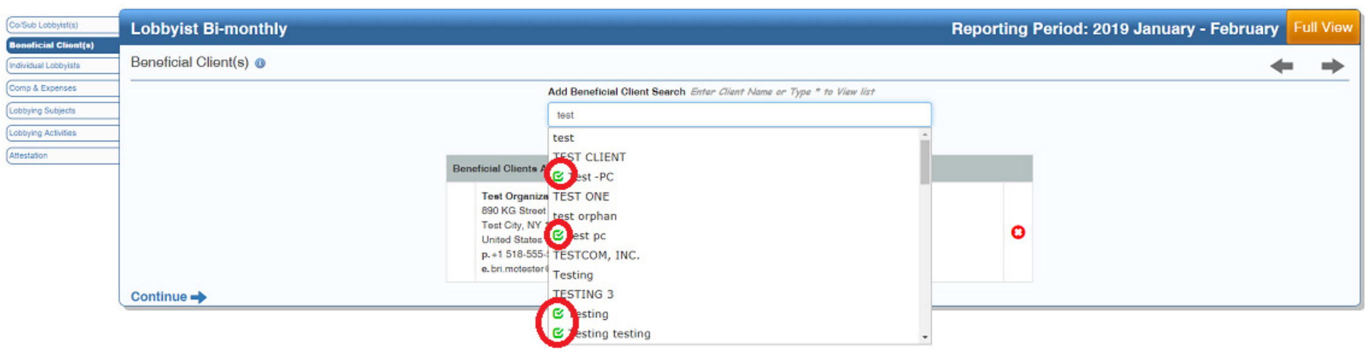
1. On the ***Beneficial Client(s)*** tab, either:
   (a) enter the first few characters of the **'Beneficial Client'** name in the text search box;

   OR

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



(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](#).



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

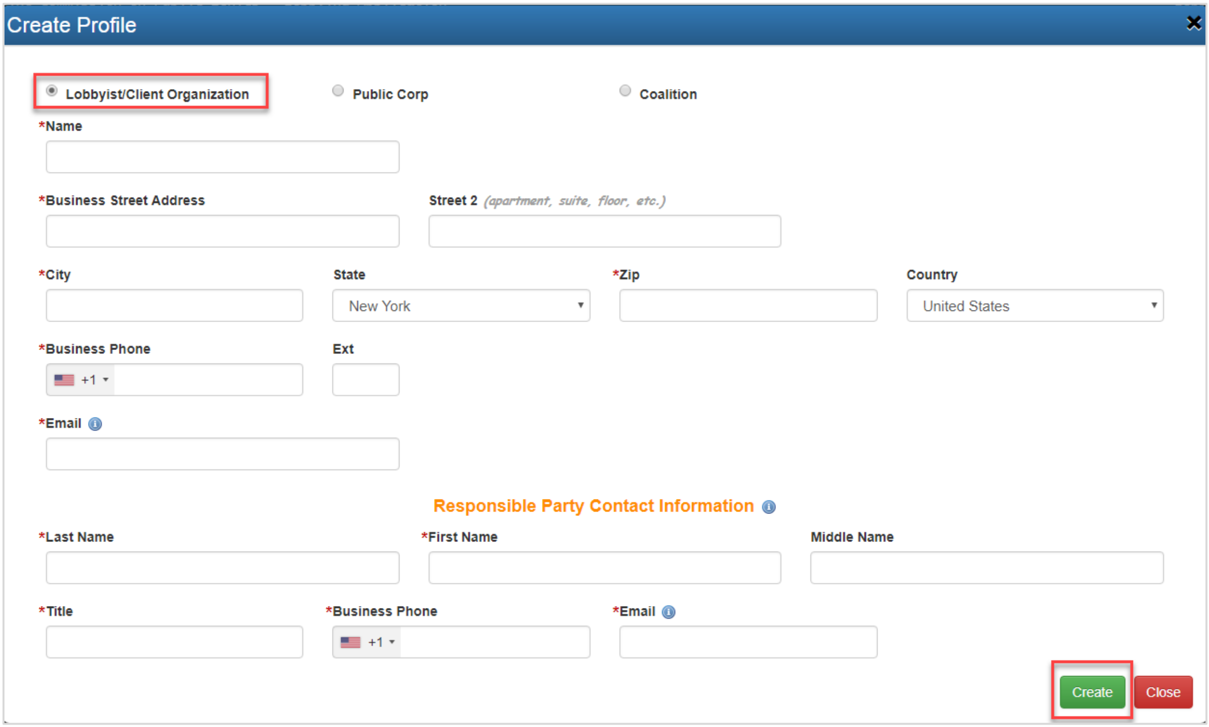
The address, phone number, and email address of the Contractual Client's place of business.

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.**

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

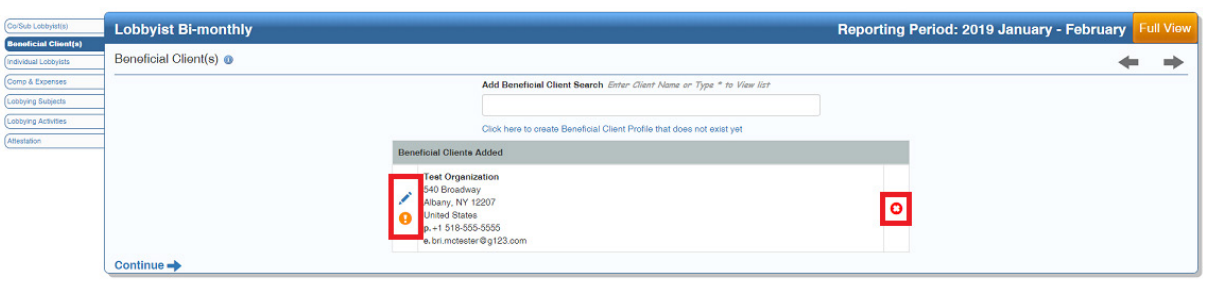


To remove or modify a 'Beneficial Client'

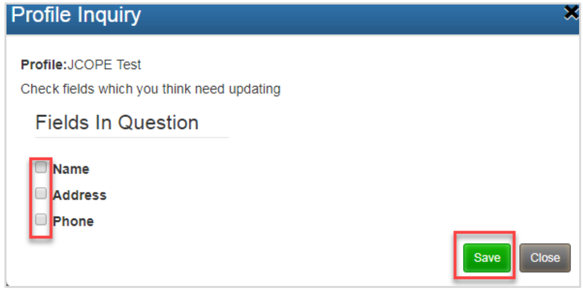
1. On the ***Beneficial Client(s)*** tab, select the red and white circle **'X'** icon.

   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.



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.



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.

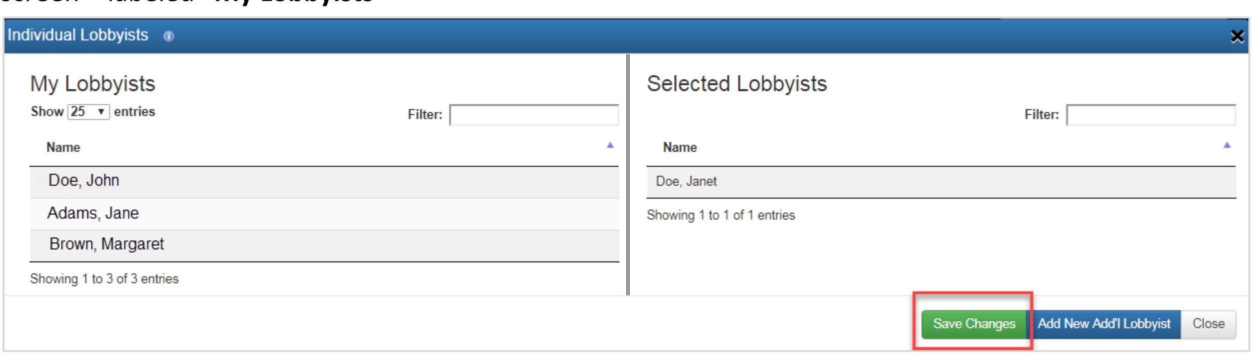
Your Bi-monthly Report must disclose the name(s) of any Individual Lobbyist that performed Lobbying Activities on behalf of the Principal Lobbyist for the benefit of the Client during the specific Bi-monthly reporting period.

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.

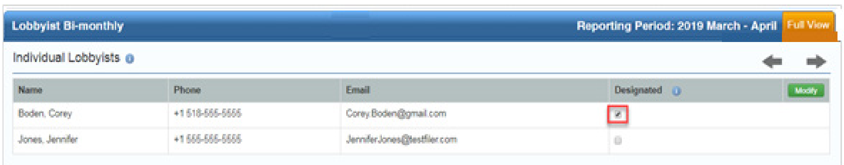
2. Your Individual Lobbyist(s) added through your Organization Profile will display on the left-side of your screen – labeled "**My Lobbyists**"



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.

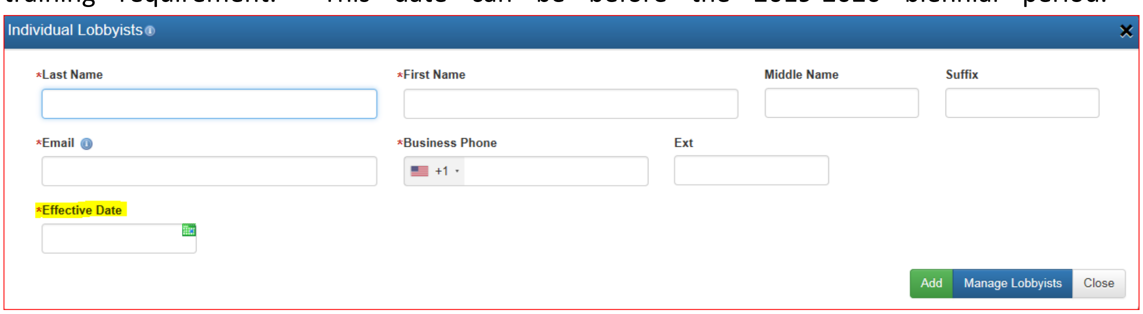


NOTE: At least one Individual Lobbyist must be listed on any Filing where "Direct Lobbying" is indicated as the Type of Lobbying Activity.

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

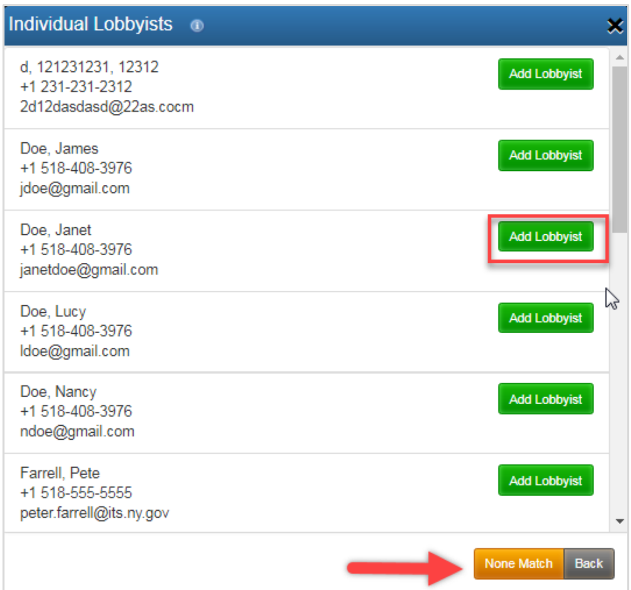
1. On the **'Individual Lobbyists'** tab, select the **'Modify'** button
2. Select the **'Add New Individual Lobbyist'** button
3. Enter the required contact information (denoted by a red asterisk)
4. Provide an **'Effective Date'***
   - ➢ **Individual Lobbyist Effective Date***

     The Individual Lobbyist's "**Effective Date**" is the 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.

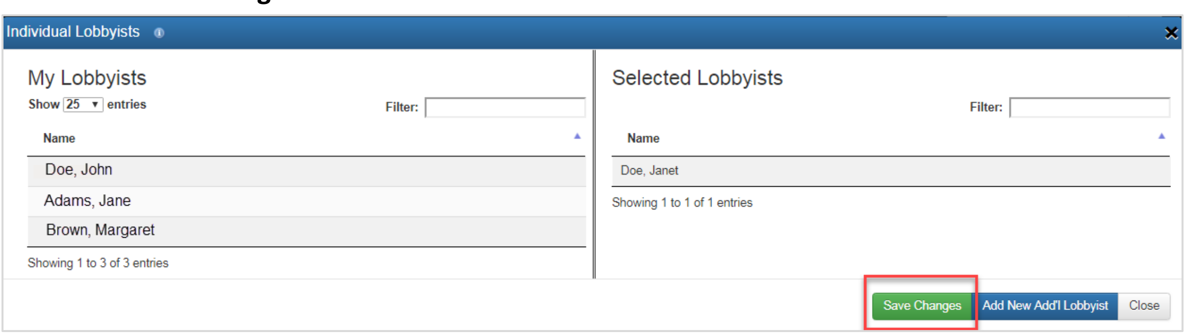


5. Select the **'Add'** button.
6. Select the **'Close'** button

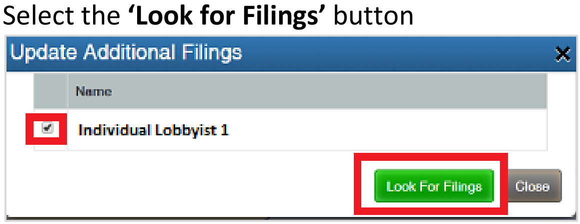
7. If any of this information matches the name and contact information of Individuals who already have existing Profiles in LA, the information will display to you. Carefully review each name/information, and if the name of the Individual Lobbyist you are attempting to add is listed (already has an existing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



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

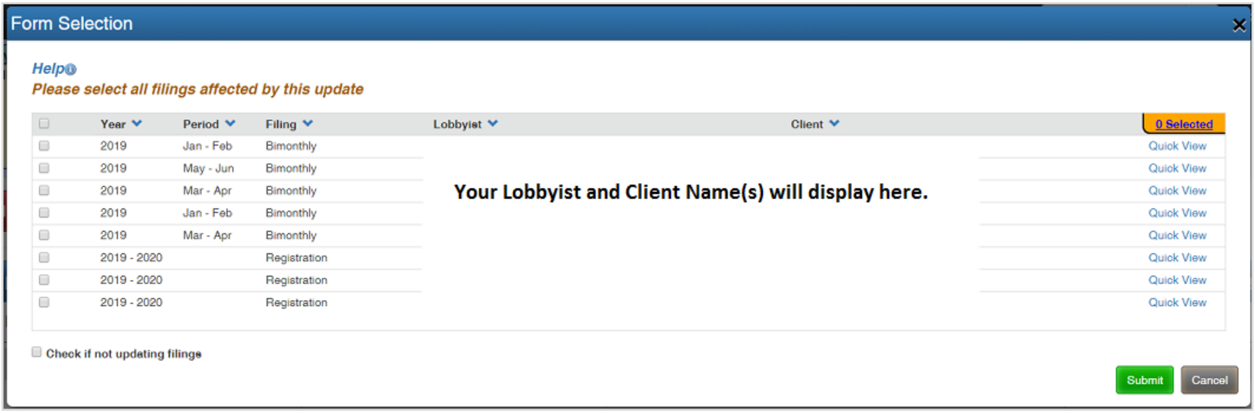


9. You will be asked if you would like to add this *new* Individual to any of your other Filings.
    a. Select the *new* Individual name
    b. Select the **'Look for Filings'** button



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'.**

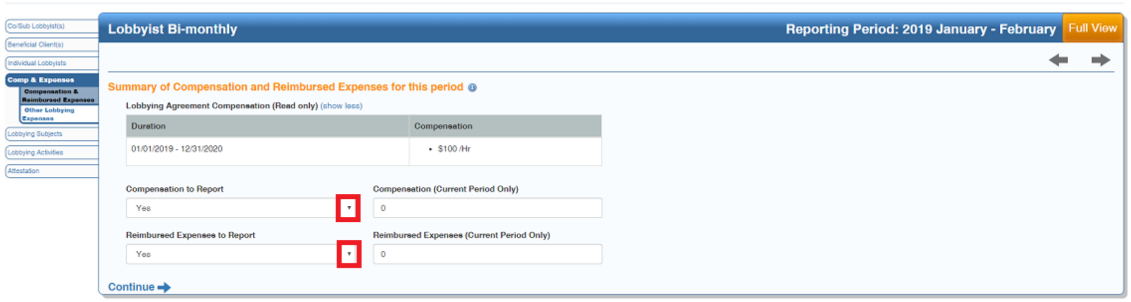
- ➢ If you select **'Yes'**, you must provide the Total (Dollar Amount) of Compensation of ALL Individual Lobbyists for the current Bi-monthly reporting period in the **'Compensation (Current Period Only)'** text box.

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.

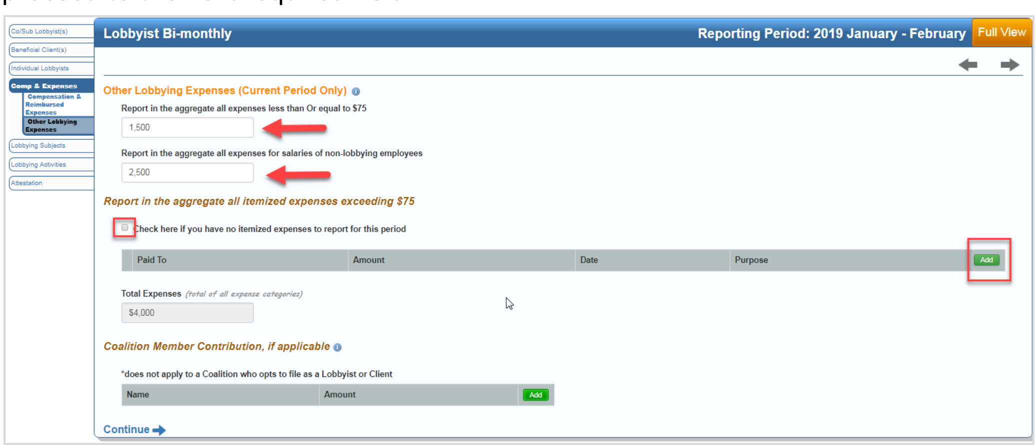


2. Other Lobbying Expenses sub-tab

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.



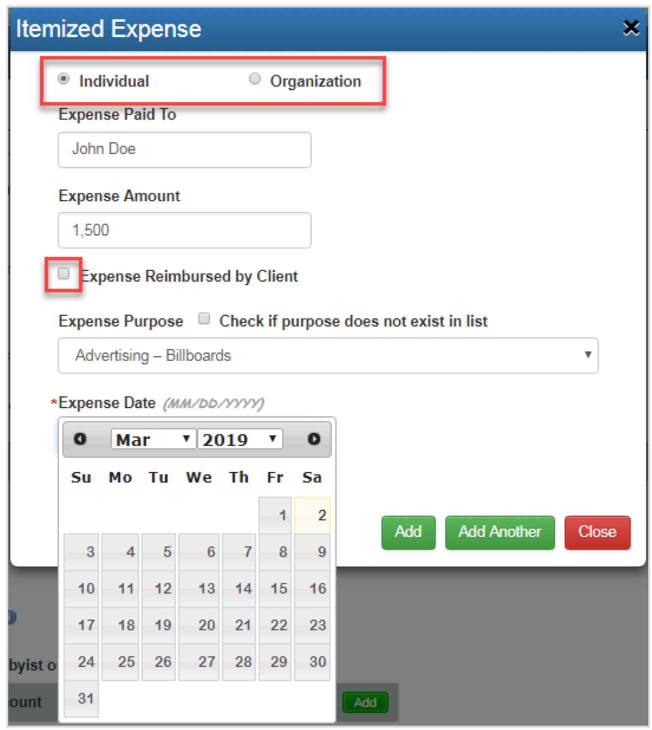
NOTE: If you report **'0'**:

- ➢ 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

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

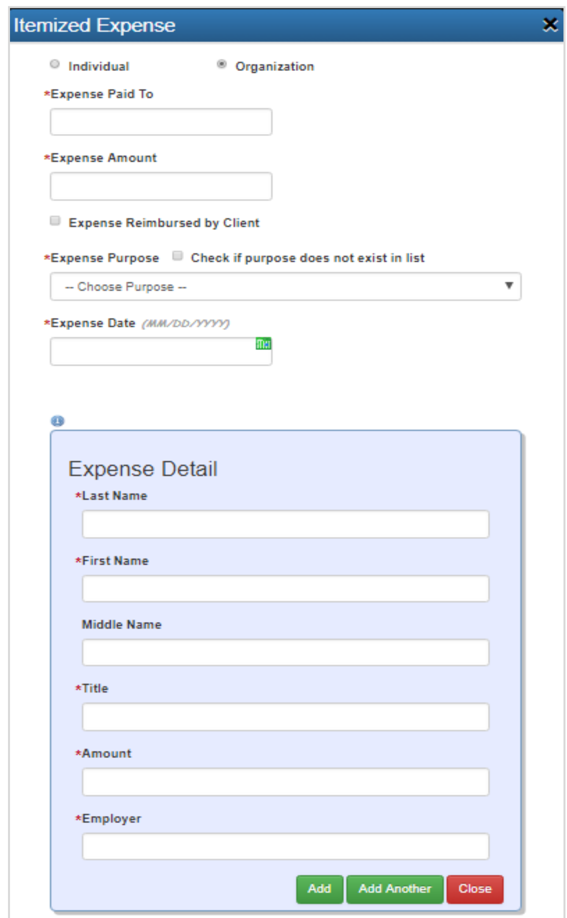
You can select the **'Check if purpose does not exist in list'** check-box and type an expense purpose in the text field if a specific Expense purpose is not an available option in the pre-populated list.

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:

i. Name of individual(s) (Multiple individuals can be added)

ii. 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.)

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).

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**.

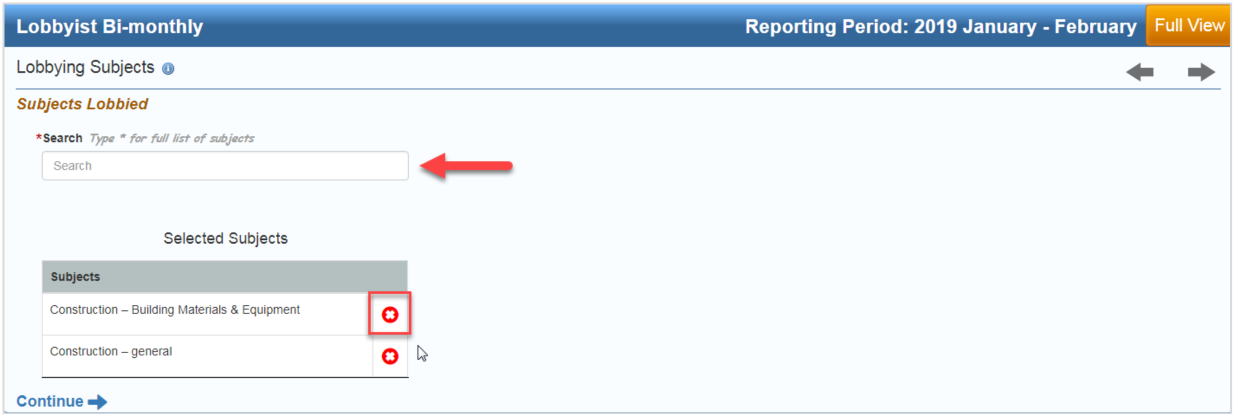
> NOTE: Changes/modification to any **'Subject'** on your Bi-monthly Report has no impact on the associated Registration Filing.

To add a 'Lobbying Subject'

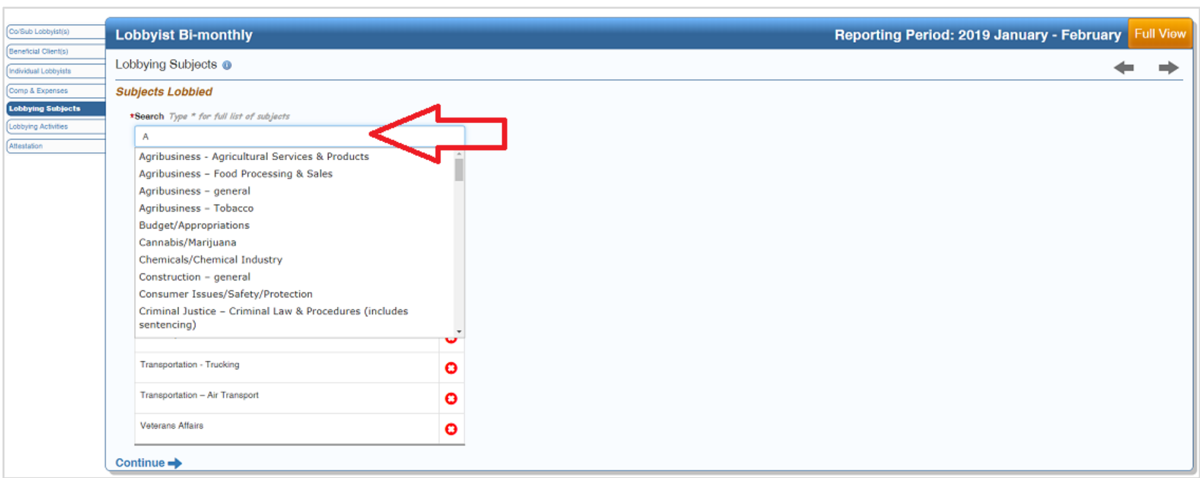
1. On the ***Lobbying Subjects*** tab on your Bi-monthly Report:
   a. enter the first few characters of the **'Subject'** in the text search box

   OR

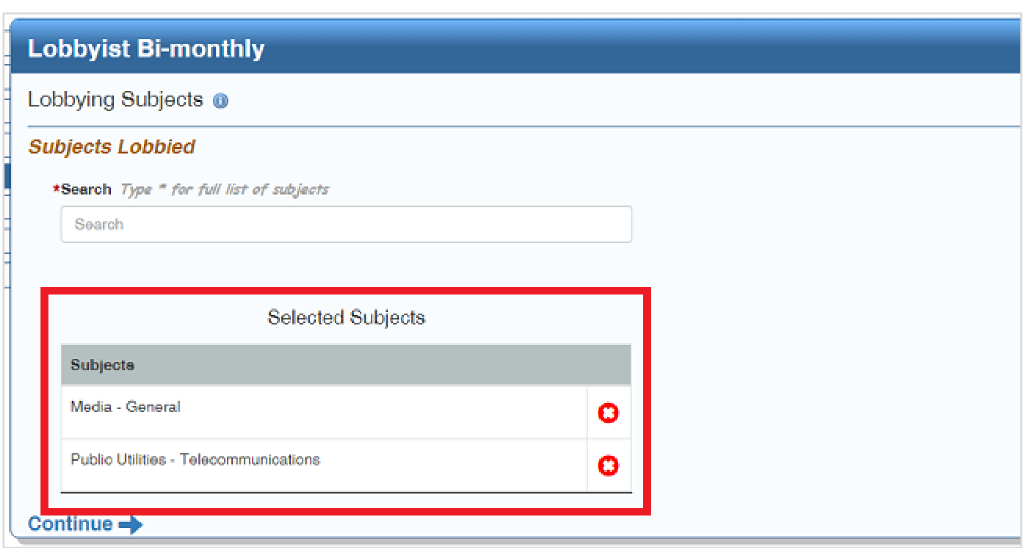
   b. type the asterisk symbol (*) in the search field to view JCOPE's comprehensive list



2. Click-on the **'Subject'** to select it.
   - You may add multiple **'Subjects'**.



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



To remove a Lobbying Subject

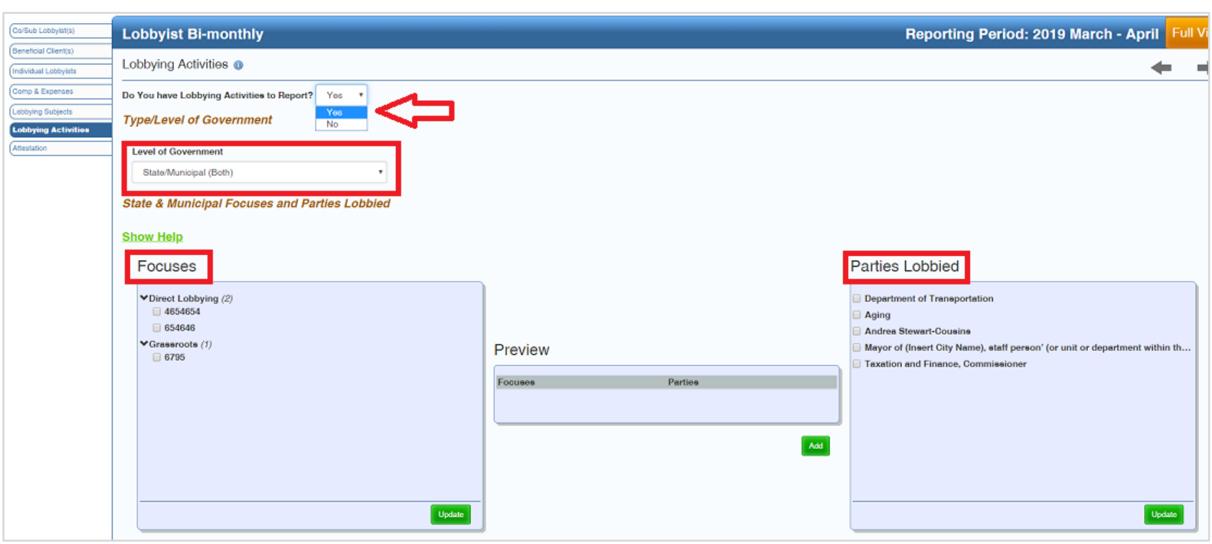
1. On the ***Lobbying Subjects*** tab on your Bi-monthly Report, select the red and white circle **'X'** icon.

Lobbying 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.



Level of Government, Focuses and Parties Lobbied*

a. To add a "Lobbying Focus"

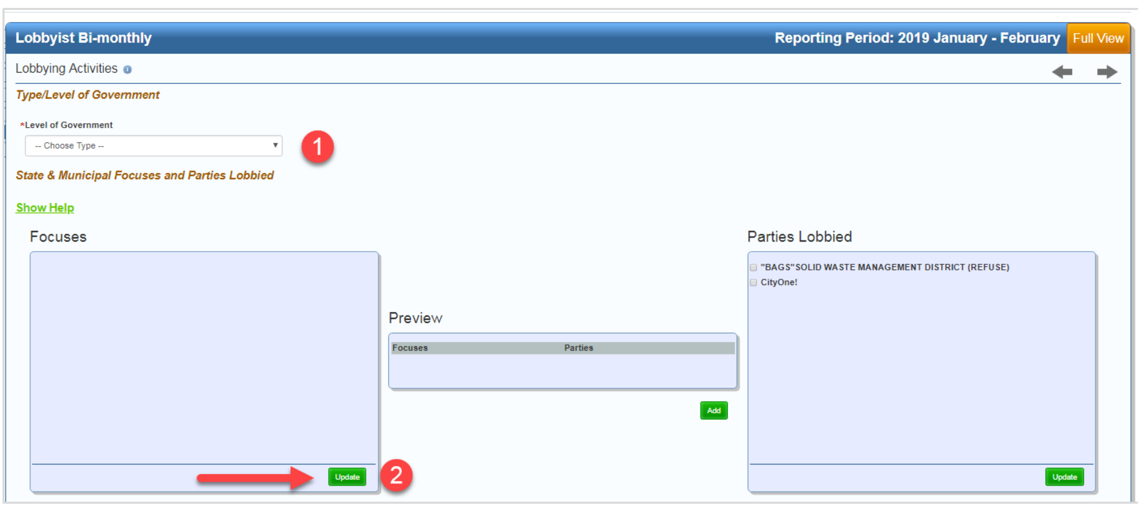
Step 1 – Select the **'Level of Government Lobbied'** from the drop - down menu.

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.

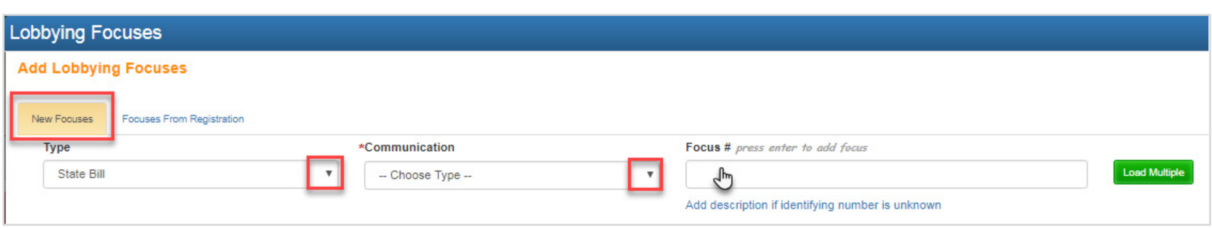
Focuses disclosed on your corresponding Registration **CAN** be added to your Bi-monthly Report by clicking the green **'Update'** button in the **'Focuses'** box.



The **'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.



2. Select a **'Focus Type'**

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'**

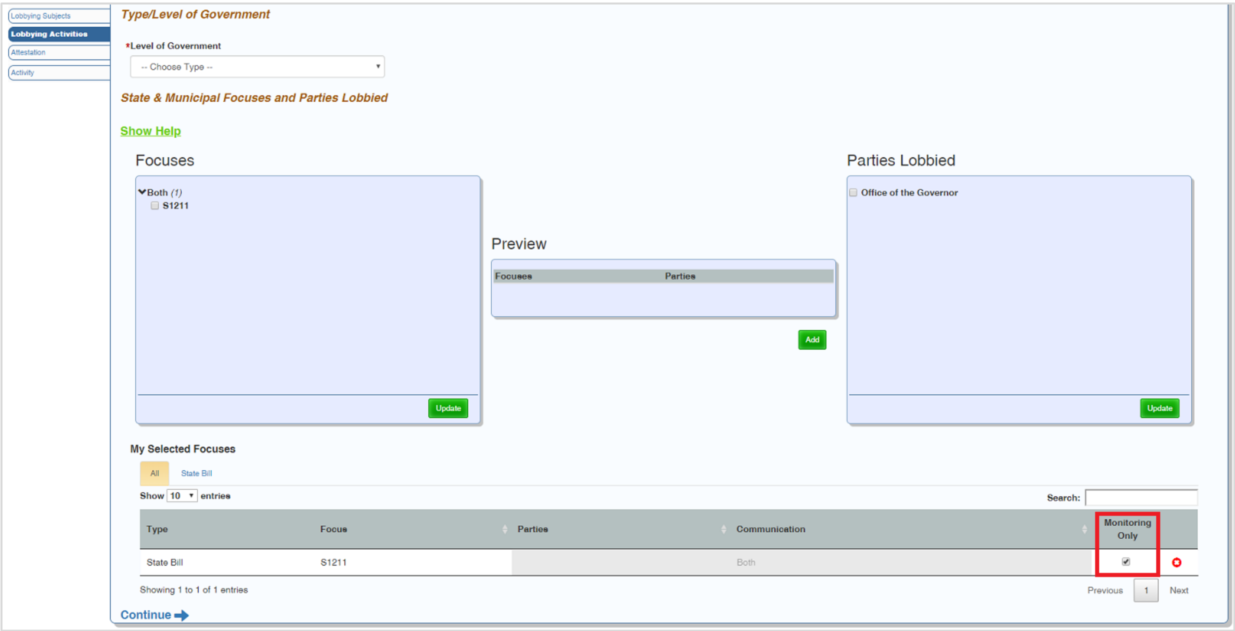
A *Type of Communication* (Direct, Grassroots Lobbying or Both)* must be assigned from the drop-down menu for each Focus number (such as the bill or procurement number), or brief description of the Focus area if the identifying number is unknown.

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.



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.*

---

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.

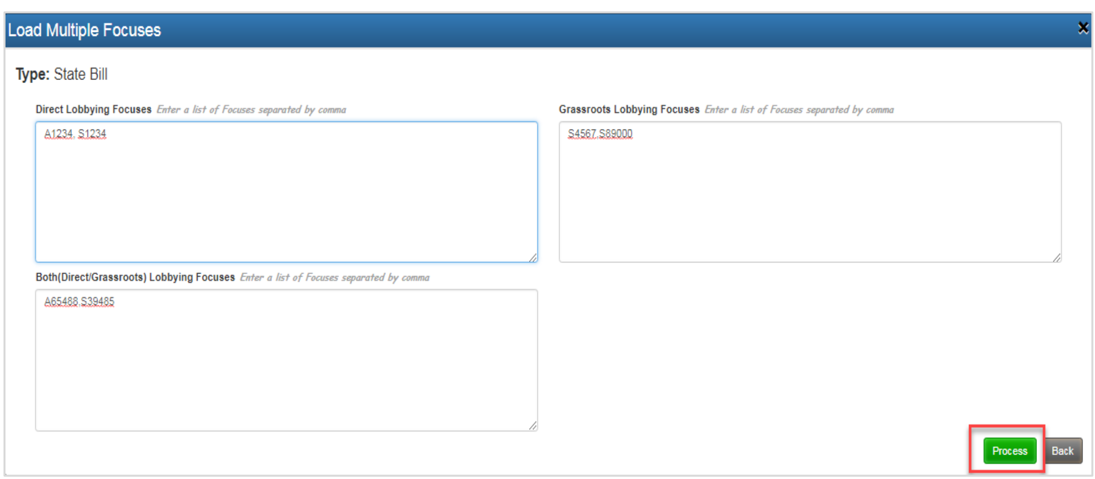
  EXAMPLE: Municipal Bill on requiring single stream recycling in the Town of Delmar, New York.

c. Load Multiple State and Municipal Bills

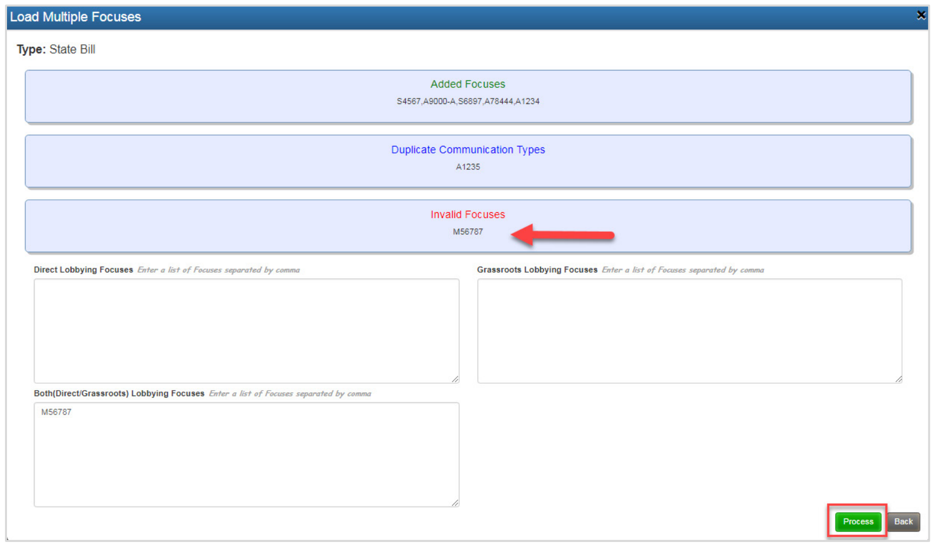
You can **upload multiple State and Municipal Bill numbers** as long as they are grouped by the same **Type of Communication**.

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.**

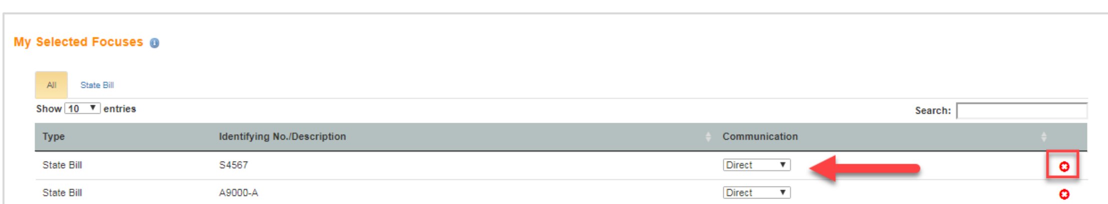


4. **Click the 'Process' button.**
   Focuses that have been successfully added will appear in the **'Added Focuses'** section.
   - If you accidentally entered a Bill number twice, it will appear in the **'Duplicate Communication Types'** section.
   - Any bill number that does not meet the formatting 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.



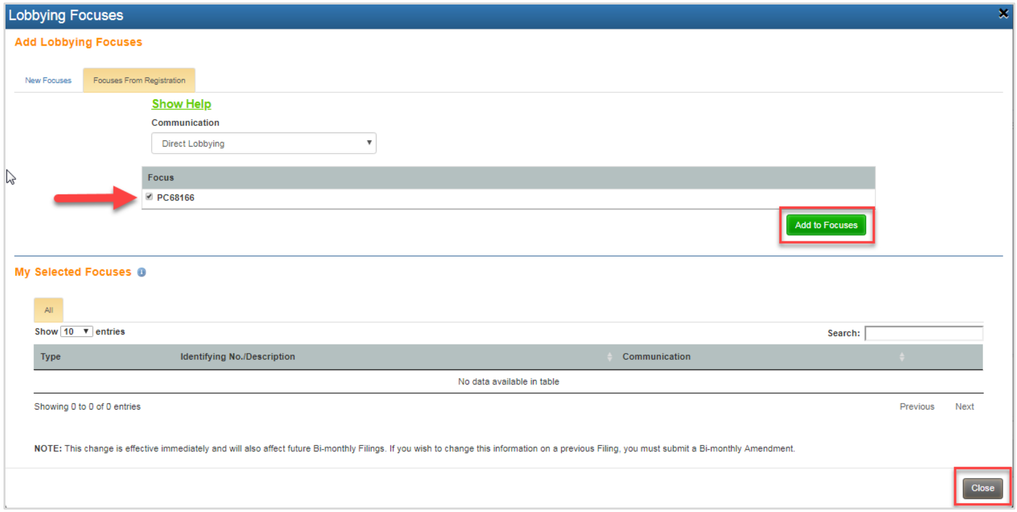
5. **When all corrections are complete:**
   The Communication Type/Focus pairing will populate to the **'Added Focuses'** section of the main **'Lobbying Focuses'** screen of your Bi-monthly Report.
     - ➢ An incorrectly identified **Communication Type** can be easily corrected by selecting a new **'Communication'** from the drop-down menu.

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



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

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



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**.

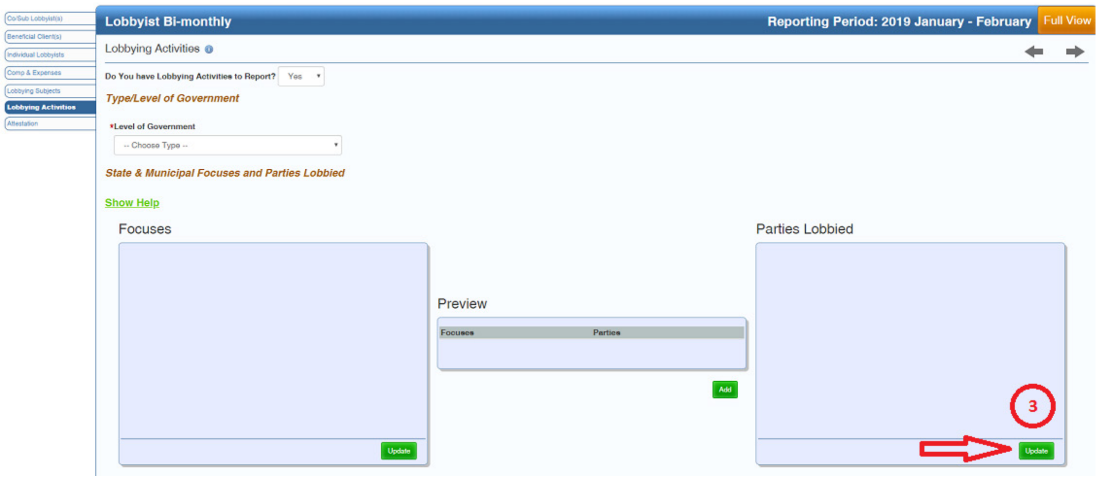
> **NOTE:** You are not required to use *every* Focus that was listed on your Registration at one time; you can select only those you lobbied during this specific reporting period. The **'Focuses from Registration'** section will be available on future Bi-monthly Reports until every Focus disclosed on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



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):

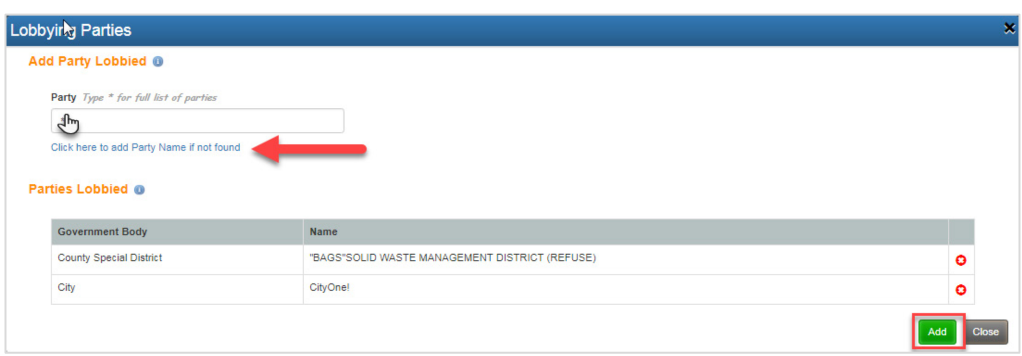
      ➢ A communication sent to entire Senate

      ➢ A communication sent to entire Assembly

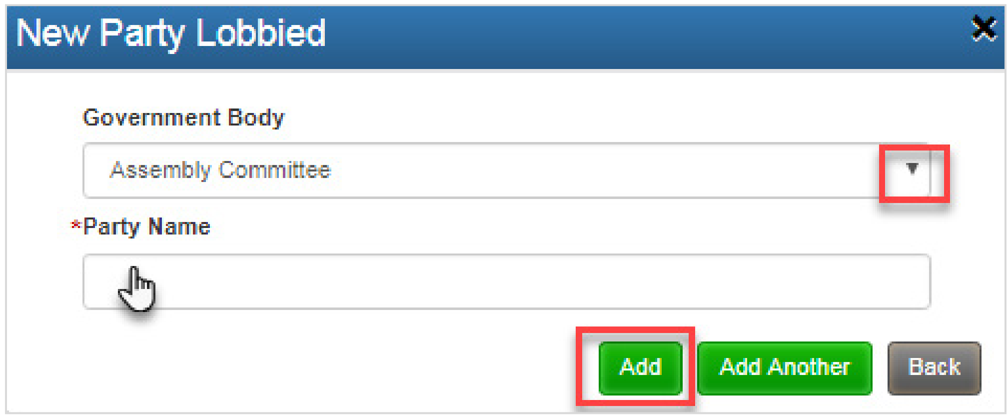
      ➢ A communication sent to entire Legislature

   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



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



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

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

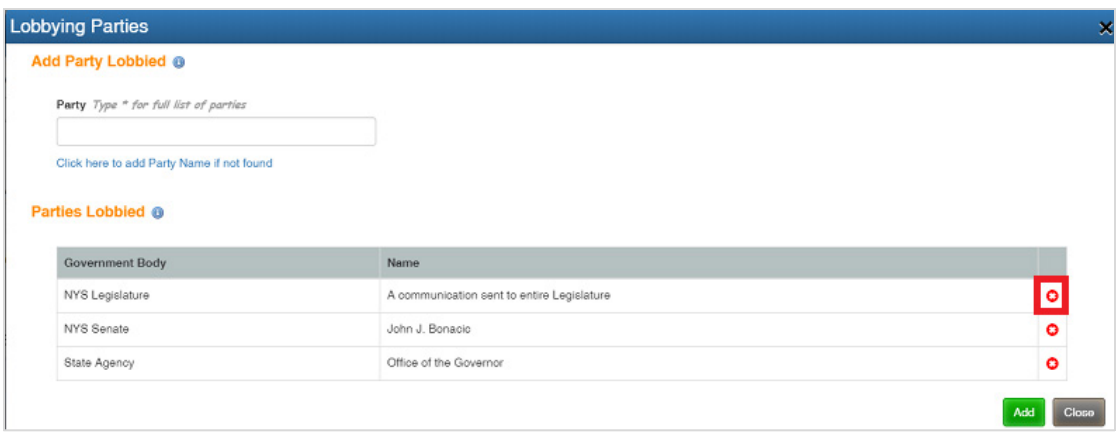
EXAMPLE:

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.



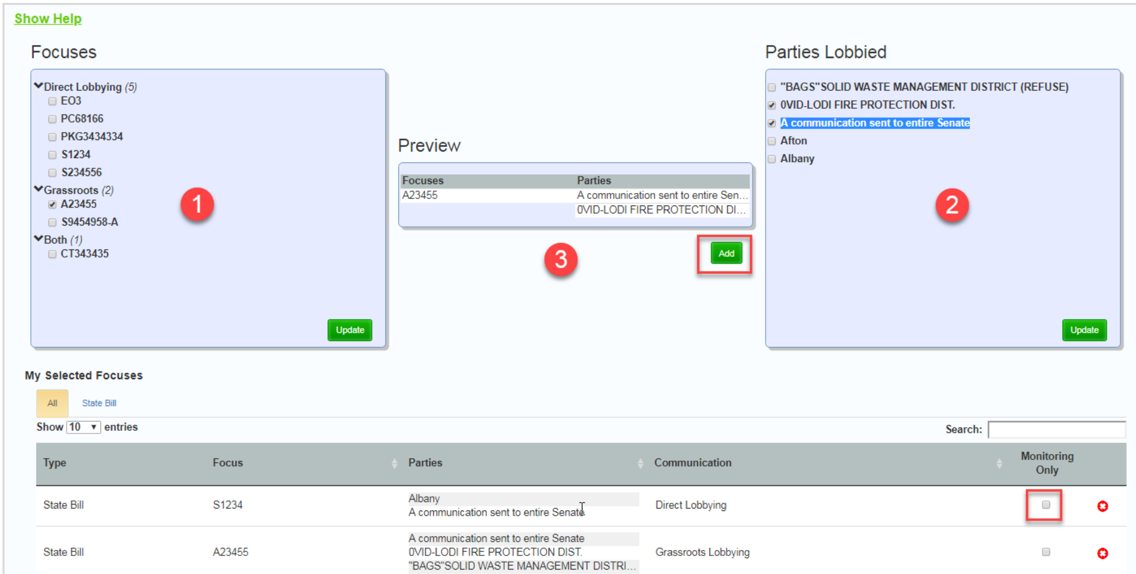
Step 4 - Assign/identify the direct connection (one-to-one relationship) between the **'Focuses' and** the target(s) of **the Lobbying Activity ('Parties Lobbied')**

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).

- ➢ 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.



- ➢ 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.

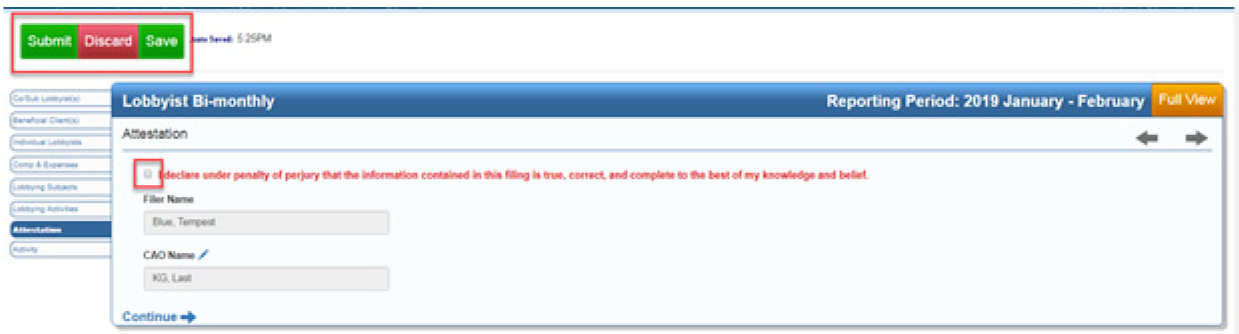
Monitoring Only

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.

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



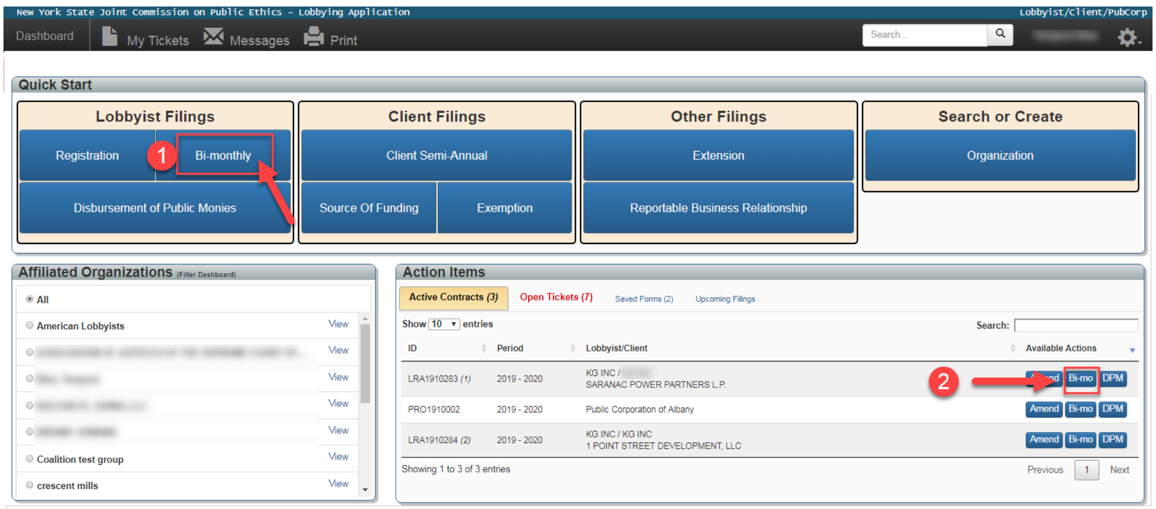
Congratulations you are all done!

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;



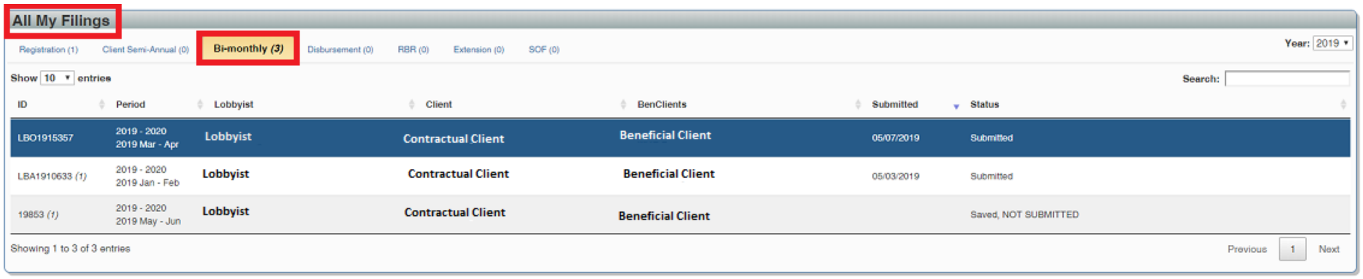
OR

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.

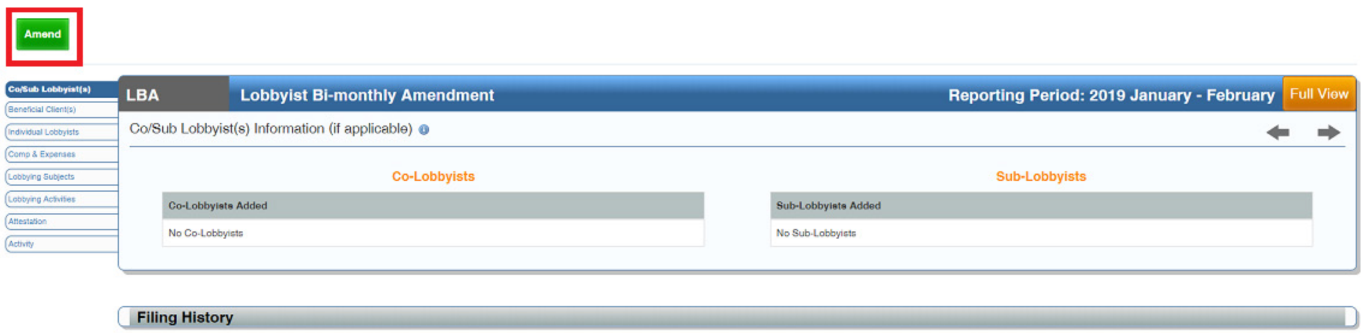
   a. Select the Bi-monthly Report from the list of submitted Bi-monthly Reports.

OR

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



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



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 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.

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.