Step 3: How to Create or Claim Organization Profiles in LA

Effective April 23, 2020, the functionality of creating or claiming an Organization Profile in the Lobbying Application (‘LA’) has changed. This change was made to minimize the risk of duplicate Organization Profiles being created in LA. Please review these instructions in their entirety.

The following instructions are intended to assist Filers to:

A. Claim an Organization Profile;
B. Create a new Organization Profile (if an Organization Profile does not exist in the LA); or
C. Create an Organization ‘placeholder’ solely for the purposes of submitting a Filing

Option ‘A’ – Claim an Organization Profile or Option ‘B’– Create New Organization Profile

Only the ‘Responsible Party’ (Chief Administrative Officer, Delegated Administrator, or designee) of an Organization should ‘Claim’ or ‘Create’ an Organization Profile.

Example: I am the CAO of ABC Lobbying Organization (can be a Principal Lobbyist, Contractual Client, etc.). As the CAO, I can either ‘claim’ my unverified Organization Profile (Profile exists in LA but has not been verified yet); or ‘create’ a new Organization Profile for ABC Lobbying Organization.

Examples of what not to do:

- If you are a Client (Contractual or Beneficial), DO NOT create or claim the Organization Profile of your Principal Lobbyist.
- If you are a Principal Lobbyist, DO NOT create or claim the Organization Profile of your Client.
- If you are an Employed Lobbyist (you are both the Principal Lobbyist and the Contractual Client), DO NOT create or claim two different Organization Profiles with the same name. A Filer may submit a Lobbyist Statement of Registration and a Client Semi-Annual Report using the same Organization Profile.

PLEASE NOTE: A CAO, Delegated Administrator and Preparer must already have a personal NY.gov ID account and a verified User Profile in LA. The Individual’s numeric ID, generated from a verified User Profile in LA, must be provided in the Organization Profile before they can be assigned a role within an Organization Profile. See screenshot below for an example of an Individual numeric ID.

Refer to Step 1: How to create an NY.gov ID account using the JCOPE Enrollment Link; and Step 2: How to create a new User Profile for detailed instructions.
Option ‘C’ – Create a Placeholder Organization so a Filing can be submitted

A Filer who is attempting to list either a Lobbyist or Client on a Filing but is unable to locate that organization's profile after entering their name in the search box located within the filing should create a ‘place holder’.

Example: I am the CAO of ABC Lobbying Organization and my Contractual Client, ‘XYZ Client’, did not appear in the dropdown when I entered their name in the ‘Contractual Client Name’ search field.

To begin creating the “place holder” Profile, click on the link below and follow the steps accordingly.
OPTION ‘A’ – Claim an Organization Profile

1. Click the ‘Create or Claim Organization Profile’ button from the Quick Start Menu on your Dashboard.

2. Type the first few characters of the Organization name in the ‘Organization Name’ field. If the Organization name is an exact match or contains similarities to an existing Organization Profile in LA, a list of pre-populated results will display. Please review ALL possible matches carefully to minimize the risk of a duplicate Profile being created in the LA.

   PLEASE NOTE: If any of the contact information (such as the phone number, email address or business address) is not correct, DO NOT create a new Profile. Once you select the Profile, you will be able to edit the Profile to modify any incorrect information. If you are unsure, contact a JCOPE Filing Specialist for assistance.
3. To select an Organization from the list, click inside the box (next to the Organization name); then click the green ‘Select’ button.

   a. If you are not an Individual who has any authority for this selected Organization, and should not be listed as a Delegated Administrator, select the red ‘skip’ button; and follow instructions for Option ‘C’ to create an Organization Placeholder solely for the purposes of submitting a Filing.

   b. To claim an Organization Profile, click the green ‘yes’ button. NOTE: You will automatically be added as a Delegated Administrator on the Organization Profile.

   c. You can edit any of the Organization information contained in the Profile by clicking the ‘Edit’ button.

   Refer to Step 4 on the following page for detailed instructions on how to edit and assign roles within the Organization Profile.

   d. If the selected Organization Profile has already been claimed, an error message will display. You must contact JCOPE staff at (518) 474-3973 or helpdesk@jcope.ny.gov for assistance. DO NOT create a new Profile unless a Filings Specialist has advised you to do so. Otherwise, you may be unable to properly submit your filings.

   e. Select the red ‘Close’ button; and follow instructions for Option ‘B’ to create a new Organization Profile

4. If your Organization name is not included in the list of possible matches, refer to the ‘Option B’ instructions beginning on page 5 to create a new Profile.
OPTION ‘B’ – Create my Organization Profile

1. Click the ‘Create or Claim Organization Profile’ button from the Quick Start Menu on your Dashboard.

2. Type the first few characters of the Organization name in the ‘Organization Name’ field. If the Organization name is an exact match or contains similarities to an existing Organization Profile in LA, a list of pre-populated results will display. Please review ALL possible matches carefully to minimize the risk of a duplicate Profile being created in the LA. If you select an Organization in error and would like to remove it, click ‘Unselect Organization’.

3. Click the “Esc” key on your keyboard to clear the list of possible Organization Profiles; then, click ‘Skip’ to create the new Organization Profile.
4. Click the green ‘Select’ button in the Create a new Organization Profile box.

5. Select the type of Lobbying ‘Organization’ (Lobbyist or Client Organization, Public Corporation, Coalition) by clicking on the applicable radio button; then click the green ‘Continue’ button. **PLEASE NOTE:** the application automatically defaults to Lobbyist or Client Organization.

6. Enter the ‘Organization Name’ in the text field.

7. You will automatically be assigned as BOTH the CAO (Chief Administrative Officer) and Delegated Administrator. To assign a different individual as the CAO, click the red ‘x’ and enter the Individual’s numeric ID; then click ‘Add’.

8. **Assign a second Delegated Administrator (optional).** Every Organization Profile may assign two Delegated Administrators. The individual who creates a new Organization Profile is automatically assigned as a Delegated Administrator. To assign a second Delegated Administrator, enter the Individual’s numeric ID in the empty ‘Delegated Administrator’ field; then click ‘Add’.

**PRO TIP:** Click any of the ‘i’ info icons for guidance on selecting which type of Organization applies to you. **PLEASE NOTE:** A Public Corporation is a municipal corporation that engages in Lobbying Activity on its own behalf, a Public Corporation is not a publicly traded company. **Example:** The City of Albany, The Dormitory Authority of the State of NY, and the Metropolitan Transportation Authority are examples of a Public Corporation.
**PRO TIP:** Individuals assigned as a *Primary Delegated Administrator* cannot remove themselves from an Organization Profile. A Delegated Administrator may only be removed by the CAO, or the alternate Delegated Administrator.

9. Enter the ‘*Business Street Address*’ and all other contact information as required. To include an alternate mailing address click the ‘*Add Alt Address*’ button.

10. Click the ‘*Primary Mailing Address*’ check box if you wish to assign the alternate address as the primary business mailing address for the Organization.
11. Enter the **business phone number** and enter a valid ‘Email’ address in the appropriate field. **Do not use a general email address.** Enter an (optional) ‘Alternate Email’ address, if desired. Notifications (including Filing issues) are sent to the Organization’s email address, as well as the email addresses of the CAO, Delegated Administrator(s) and Preparer(s).

![](image1)

12. If you would like other individuals to receive e-blast notifications and reminders from JCOPE, you may assign them as ‘Contact(s)’. Multiple contact names can be added. Click the green ‘+’ (plus) button, to add a new contact. Enter the required contact information and click ‘Add’ to save changes.

![](image2)

**PLEASE NOTE:** Individuals listed as a ‘Contact’ do NOT receive notifications regarding issues with Filings.

13. Also Known As is used for entities that may be recognized by the public as an acronym or other similar identifier which is different than the Organization name in the Lobbying Application. To add an ‘Also Known As’ name, click the green ‘+’ (plus) button and enter that name in the field. Click the red and white ‘X’ icon to undo any changes.

![](image3)
14. Click the **Attestation** check box and click ‘Create’ to access the Organization Profile navigation menu.

Refer to page 14 for instructions on navigating functions related to the Organization Profile.
OPTION ‘C’ – Create a Placeholder Organization to submit a Filing

1. Click the ‘Create or Claim Organization Profile’ button from the Quick Start Menu on your Dashboard.

2. Type the first few characters of the Organization name in the ‘Organization Name’ field. If the Organization name is an exact match or contains similarities to an existing Organization Profile in LA, a list of pre-populated results will display. Please review ALL possible matches carefully to minimize the risk of a duplicate Profile being created in the LA.

   If you select an Organization in error and would like to remove it, click ‘Unselect Organization’.

   Click the “Esc” key on your keyboard to clear the list of possible Organization Profiles; then, click ‘Skip’ to create the Placeholder Profile.
3. Click the green ‘Select’ button in the ‘I need to Identify a Organization for the purpose of submitting a Filing’ box.

4. Select the type of Lobbying ‘Organization’ (Lobbyist or Client Organization, Public Corporation, Coalition) by clicking on the applicable radio button; then click the green ‘Continue’ button. PLEASE NOTE: the application automatically defaults to Lobbyist or Client Organization.

   PRO TIP: Click any of the ‘i’ info icons for guidance on selecting which type of Organization applies to you. PLEASE NOTE: A Public Corporation is a municipal corporation that engages in Lobbying Activity on its own behalf, a Public Corporation is not a publicly traded company. Example: The City of Albany, The Dormitory Authority of the State of NY, and the Metropolitan Transportation Authority are examples of a Public Corporation.

5. Enter the ‘Organization Name’ (1) and the business address (2) of the Organization you are creating a ‘placeholder’ Profile for.
6. Enter the 'Business phone' and 'Email Address' of the Organization. Do not list your personal email address; list the email address of someone employed by the ‘placeholder’ Organization.

7. If you would like other individuals to receive e-blast notifications and reminders from JCOPE, you may assign them as ‘Contact(s)’. Multiple contact names can be added. Click the green ‘+’ (plus) button, to add a new contact. Enter the required contact information and click ‘Add’ to save changes.

**PLEASE NOTE:** Individuals listed as a ‘Contact’ do NOT receive notifications regarding issues with Filings.

8. Also Known As is used for entities that may be recognized by the public as an acronym or other similar identifier which is different than the Organization name in the Lobbying Application. To add an ‘Also Known As’ name, click the green ‘+’ (plus) button and enter that name in the field. Click the red and white ‘X’ icon to undo any changes.
15. Click the **Attestation** check box and click ‘**Create**’ to access the Organization Profile navigation menu.

![Attestation check box](image)

16. The Lobbying Application will automatically check for duplicate Profiles with the same organization name. If no duplicates are found, a success banner with the organization name will appear on your Dashboard. The placeholder organization will now be available for selection on any Filing.

![Success banner](image)
Navigating the functions of the Organization Profile

The Organization Profile contains all information related to the Organization. The Organization Profile includes a navigation menu of commonly used functions automatically built in. The navigation menu items are described below.

a. **Organization Information** – contains contact information; and allows authorized users to create and assign:
   1. the CAO
   2. Delegated Administrator(s)
b. **Individual Lobbyists** – create and assign Individual Lobbyists to the Organization Profile
c. **Authorized Preparers** – assign Authorized Preparers to file on behalf of the Organization;
d. **Affiliations** – Displays all individuals and Organizations that are “affiliated” to the Organization Profile;
e. **Business Relationship Form List** – view and file Reportable Business Relationships
f. **Forms** – View all saved and submitted forms related to the Organization

g. **History** – View a history of any edits made to the Organization Profile
h. **Filing Tickets** – View filing tickets associated with the Organization Profile
i. **Full Profile View** – Eliminate the need to click through each of the above menu items and view the entire contents of the Organization in full view.

**PRO TIP:** Not sure which screen you are on? Profile menu items that are selected are highlighted in blue.

b. **HOW TO ADD INDIVIDUAL LOBBYISTS TO AN ORGANIZATION PROFILE**

1. Select the ‘**Individual Lobbyists**’ menu item and click ‘**Edit**’.

2. Click the green ‘**Add Individual Lobbyist**’ button.
3. Enter the required contact information for the Individual Lobbyist. Use the green calendar icon to enter the ‘Effective Date’ of when the Individual Lobbyist is authorized to lobby. You may also type in the effective date by using a mm/dd/yyyy format.

4. Click the Attestation check box and click ‘Add’ to save changes or click ‘Close’ to discard and return to the prior screen. Repeat these steps for every Individual Lobbyist you would like added to your Organization Profile.

5. If the system suspects there is an existing profile for an Individual Lobbyist, a pre-populated list of possible matches is displayed. To select an Individual Lobbyist from the list of possible matches, click ‘Add Lobbyist’. Otherwise, click ‘None Match’ to save your changes and create a new Profile for your Individual Lobbyist. To discard your changes and return to the prior screen, click the ‘Back’ button.

c. HOW TO ASSIGN A PREPARER TO AN ORGANIZATION PROFILE

PLEASE NOTE: Only the CAO and DA can assign/remove an Authorized Preparer to the Organization profile.

1. Click ‘Authorized Preparers’ tab on the navigation menu and click ‘EDIT’.

2. Enter the Individual’s numeric ID in the Preparer text box and click ‘Add’ to allow this person to prepare and submit Filings on behalf of the Organization. The Individual numeric ID is in the User Profile. You may add multiple preparers to the organization profile by entering a new Individual ID.
3. To remove a Preparer, click the red circle ‘X’ icon next to the Individual’s name.

4. When you have finished adding Preparers to the Organization Profile, click the Attestation check box and click ‘Save’.

**AFFILIATIONS AND THE ORGANIZATION PROFILE**

An affiliation is created when individuals and/or entities have a role or relationship with the Organization. When a new Organization Profile is created, or an existing Organization is claimed, the following roles will be “affiliated” to the Organization Profile: CAO, Delegated Administrators, Preparers, and Individual Lobbyists. When an authorized user begins a Lobbyist or Client filing, the following affiliations will automatically be generated:

- Co-Lobbyist and Sub-Lobbyist relationships; and
- Contractual and Beneficial Clients.

Individuals who serve as a Preparer or Delegated Administrator role are the only affiliations that may be removed from your Organization Profile.

1. To view a list of affiliations associated with your Organization Profile, select the ‘Affiliations’ navigation menu.
2. Click a blue header to expand and view the information.

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**e. BUSINESS RELATIONSHIP FORM LIST – HOW TO FILE A REPORTABLE BUSINESS RELATIONSHIP**

You may either create a new ‘RBR’ form or view and submit a previously saved form.

1. Click the green ‘New Business Relationship’ button to begin a new RBR form. To view a saved form, click on the ‘Saved, Not Submitted’ hyperlink. Refer to the ‘How to File RBR Instructions’ on the JCOPE website for detailed information on how to file an RBR form.

![Image: Beneficial Client Example - Organization Profile](image)

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**f. FORMS - HOW TO VIEW FILINGS RELATED TO THE ORGANIZATION PROFILE**

To access any of your saved, or submitted filings, select the ‘Form’ menu item.

1. To view a form, click the name of the form in the ‘Profile’ column. To filter results to a specific form (Registration, Client Semi-Annual, Bi-Monthly, Disbursement, Reportable Business Relationship (RBR), Extension, or Source of Funding (SoF)), click the form category type. The total number of forms filed for each category type is displayed to the left of the form name.

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17 of 19
2. Click on the name of the form to view the form.

![Forms](image1)

**g. HISTORY**

Click on the ‘History’ menu item to view any changes made to the Organization Profile.

**h. HOW TO VIEW FILING TICKETS RELATED TO THE ORGANIZATION PROFILE**

If there are issues with any of your filings, a ticket will be issued by JCOPE. Tickets may be viewed by selecting the ‘Filing Tickets’ menu item from your Organization Profile. To view a ticket, select the ticket from the window. You may also filter the amount of tickets you can view at once by selecting the ‘Show Entries’ drop-down menu. Tickets may also be searched by entering information in the ‘Search’ field.

![Tickets](image2)

**i. FULL PROFILE VIEW**

Click the ‘Full Profile View’ menu item to hide the Organization Profile main navigation menu and display all the information related to the Organization Profile at one time.

**j. EXITING THE LOBBYING APPLICATION**

When you have finished reviewing the Organization Profile menu items, click the gear symbol located at the top right of the screen, and click ‘Logout’.
Need help?

Contact the JCOPE Helpdesk at (518) 474-3973 or send an e-mail to helpdesk@jcope.ny.gov.