

How to complete Email Verification and Recertify an Individual User and Organization Profile



Beginning in the 2021 – 2022 Biennial Period, new security enhancements have been implemented to ensure the Lobbying Application ('LA') has the most up-to date information with respect to Email addresses, and information contained in Individual User and Organization Profiles. In addition, every Individual and Organization Profile in LA must be reviewed and recertified by the Profile owner on a yearly basis.

PLEASE NOTE: ALL Individuals (Chief Administrative Officers, Delegated Administrators, and Authorized Preparers) must already have a **personal NY.gov ID account** and a **verified User Profile** to be able to utilize LA.

Important information for Chief Administrative Officers

LA will **NOT** allow any Organization to submit filings until the CAO has completed these steps. Before any Chief Administrative Officer ("CAO") listed on an Organization Profile can gain access to LA, they **MUST**:

1. verify his or her Email address; **and**
2. recertify his or her Individual (User) Profile.

Important information related to Organization Profiles

An Organization will **not** be able to submit filings until:

1. its CAO has verified his or her Email address; **and**
2. its CAO has recertified his or her Individual (User) Profile; **and**
3. the Organization's Profile has been recertified by **either** the Organization's CAO **or** Delegated Administrator ("DA").

NOTE: Organization Profiles must be recertified by either the CAO listed in the Organization Profile or a DA.

The following information will instruct Filers how to:

1. **verify their Email address** for the **Individual User Profile** (CAO, DA, and Preparer). ***This action must be completed first.***
2. **recertify** their Individual User Profile (Required on a yearly basis).
3. **recertify** an Organization Profile (Required on a yearly basis).

PLEASE NOTE:

- NY.gov Passwords may be reset by using the my.ny.gov forgotten password self-service tool. The JCOPE Helpdesk cannot assist filers with resetting password information.
- If a CAO, DA, and/or Authorized Preparer has not yet created an NY.gov username and password, and Individual User Profile in LA – Please reference [Step 1: How to create an NY.gov ID account using the JCOPE Enrollment Link](#); and [Step 2: How to create your User Profile in the JCOPE Lobbying Application](#).


How to verify the Email address listed on your Individual User Profile

The LA will require an **Individual User** (CAO, DA, and Authorized Preparer) to validate the email address listed in their **User Profile**. **Once an Individual (User) Email address is verified for the first time, filers will not have to verify their Email again unless:**

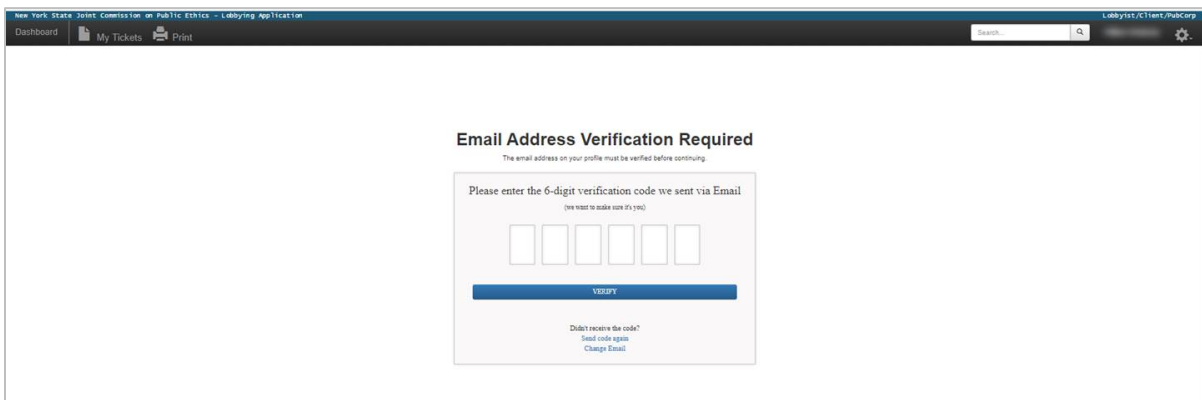
- A Filer edits the Email address recorded in their Individual User Profile by either manually updating their User Profile or via the Email Verification screen; or
- A Filer creates a NEW Individual User Profile.

Steps to complete the Email Verification process

1. From your web browser, go to the NY.gov main page at: <https://my.ny.gov/>
2. Enter your **Username** and **Password** in the appropriate fields and click 'Sign In'.

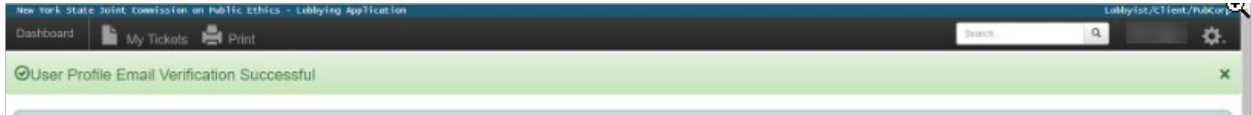


3. You will automatically be directed to the 'Email Address Verification' screen. A six-digit verification code will be sent to the Email address listed in your **Individual User Profile** with the subject line **JCOPE Lobbying Application - Email Verification**.



HOW TO COMPLETE EMAIL VERIFICATION AND RECERTIFY AN INDIVIDUAL USER AND ORGANIZATION PROFILE

4. Enter the verification code contained in the auto-generated email and click **'Verify'**. If the email verification is successful, the following message will display on the LA dashboard, **'User Profile Email Verification Successful'**.



PLEASE NOTE: If you did not receive the verification code within ten minutes, please check your 'Junk' and 'Spam' Email folders.

5. If you have not received the verification email after checking your spam and junk email inboxes, click the **'Send code again'** link. An email with a new six-digit code will be sent to the email on file.

A screenshot of the 'Email Address Verification Required' page. The page title is 'Email Address Verification Required' with a subtitle 'The email address on your profile must be verified before continuing.' Below this, a box prompts the user to 'Please enter the 6-digit verification code we sent via Email (we want to make sure it's you)'. There are six input boxes for the code, followed by a blue 'VERIFY' button. Below the button, a red arrow points to the text 'Didn't receive the code?' which has two links: 'Send code again' and 'Change Email'.

6. If you're unsure as to which email address is on file in the LA, click the **'Change email'** hyperlink and type a valid email address in the **'New Email'** textbox. Click **'OK'** to submit or **'Back'** to cancel and return to the previous page.

A screenshot of the 'Email Address Verification Required' page, showing the 'New Email' section. The page title is 'Email Address Verification Required' with a subtitle 'The email address on your profile must be verified before continuing.' Below this, a box titled 'New Email' contains an 'Email' input field. Below the input field, there are two buttons: 'OK' (blue) and 'Back' (orange). A red arrow points to the 'OK' button.

How to recertify an Individual User Profile

Individual User Profiles (CAOs, DAs, and Authorized Preparers) are now required to be recertified on a **yearly basis**. The 'anniversary' date for recertification is based on the date the Profile was last certified.


Once the status of a Profile has been set to 'recertification', Filers will be notified via Email to recertify their Individual User Profile. If they do not respond to the Email, they will be alerted the next time they attempt to log-in to the LA.

There are two ways to recertify an Individual User Profile:

1. **By Email:** An email with the subject line **'JCOPE Lobbying Application – Individual Profile Recertification'** will be automatically sent to anyone who has an **Individual User Profile** set up in LA. Filers will automatically be directed to the NY.gov login page by clicking the **'Verify Here'** hyperlink contained within the auto-generated email. This notification will only be sent to email addresses listed in Individual User Profiles.
2. **Direct Log-in:** The filer logs-in to the LA and will immediately be prompted to recertify their User Profile.

Steps to recertify your Individual User Profile by logging into the LA:

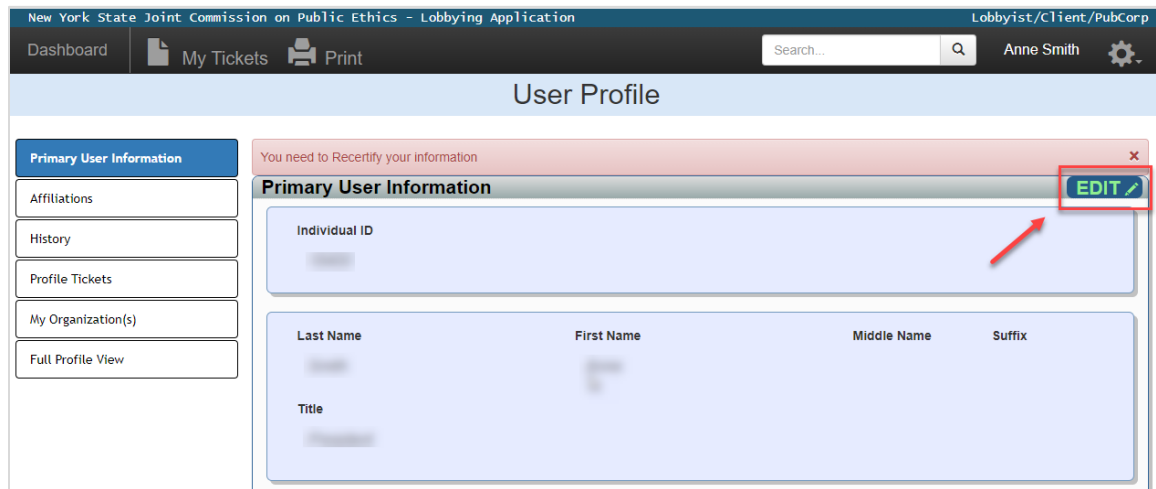
1. From your web browser, go to the NY.gov main page at: <https://my.ny.gov/>
2. Enter your **Username** and **Password** in the appropriate fields and click **'Sign In'**.



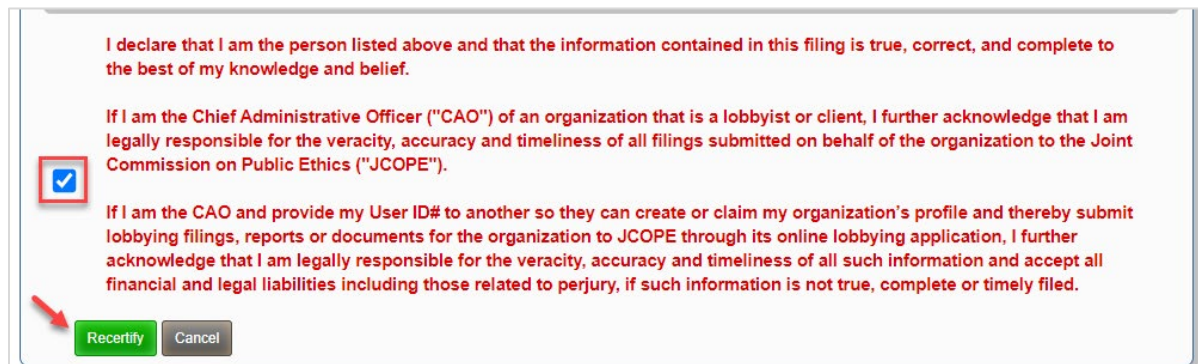
3. You will automatically be directed to your **User Profile**. A red banner will display the following message: **'You need to Recertify your information'**. You will not be permitted to access your Dashboard until your information has been recertified.

HOW TO COMPLETE EMAIL VERIFICATION AND RECERTIFY AN INDIVIDUAL USER AND ORGANIZATION PROFILE

4. Click the **'EDIT'** button. Verify the contact information including your name, title, business address and phone number are all accurate. If applicable, make any necessary changes.

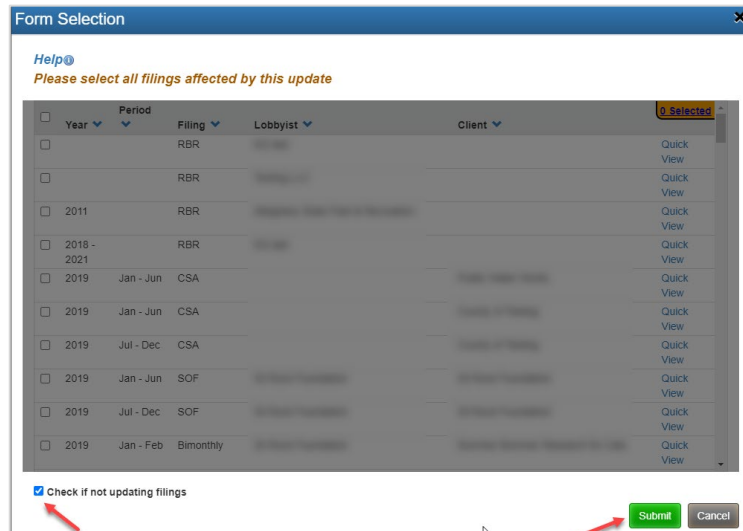


5. Once your Profile information has been updated, click the **'Attestation check box'** to indicate you have reviewed the Attestation language and your Profile information is accurate/up-to-date, and click the green **'Recertify'** button.

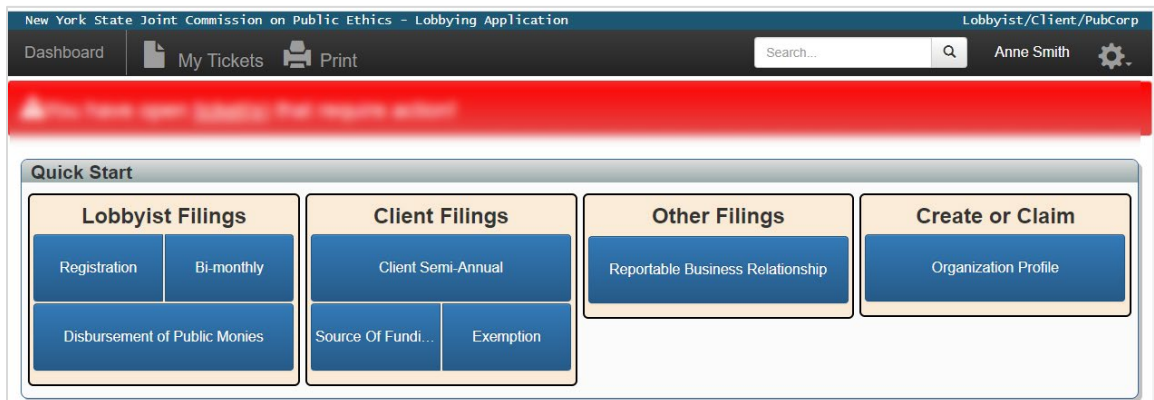


6. The **Form Selection** pop-up window will appear. If there were any changes to your Profile that should be reflected on any previously submitted filings, select the check-box next to each filing that requires an update.

Otherwise, click the **'Check if not updating filings'** check-box and click **'Submit'**.



7. Once the Individual User Profile recertification has been successfully completed, you will automatically be directed to your Dashboard in LA.



Steps to recertify an Organization Profile

Organization Profiles are now required to be recertified on a **yearly basis**. The 'anniversary' date for recertification is based on the date the Profile was last certified.

Once the status of a Profile has been set to 'recertification', Filers will be notified via Email to recertify their Organization Profile. If they do not respond to the Email, they will be alerted the next time they log-in to the LA.


NOTE: Only the **CAO** or **DA** can complete the recertification process for an Organization Profile. LA will **not** allow an Organization to submit any filings until **both** the CAOs Individual User Profile **and** the Organization Profile have been recertified.

There are two ways to recertify an Organization Profile:

1. **By Email:** An Email with the subject line **JCOPE Lobbying Application – Organization Profile Recertification** will be sent to both the CAO and DA listed in the Organization Profile. Filers will automatically be directed to the NY.gov login page by clicking the '**Verify Here**' hyperlink contained within the auto-generated email. This notification will be sent to email addresses listed in the Organization Profile.
2. **Direct Log-in:** The filer logs-in to the LA and will immediately be prompted to recertify the Organization Profile.

Steps to recertify an Organization Profile by logging into the LA

1. From your web browser, go to the NY.gov main page at: <https://my.ny.gov/>
2. Enter your **Username** and **Password** in the appropriate fields and click 'Sign In'.



Please login after reading the Acceptable Use Policy below

NY.gov ID

Username:

Password:

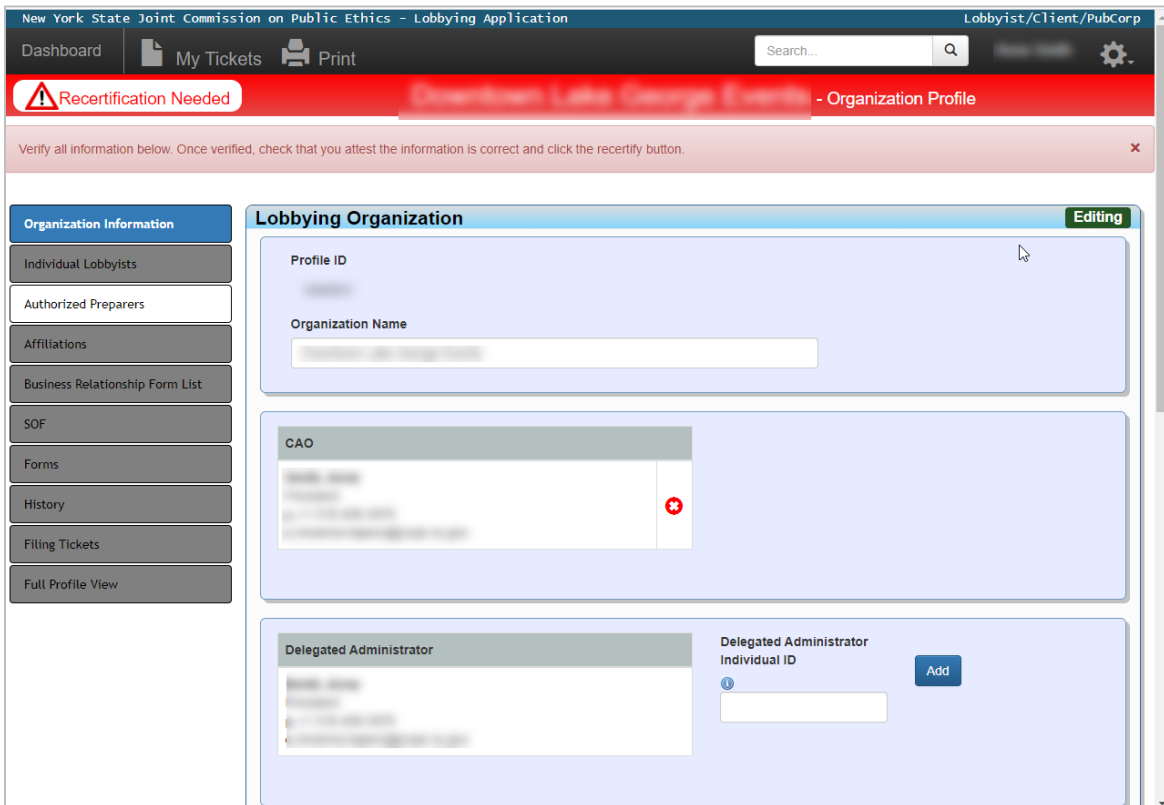
Sign In

Forgot your [Username](#) or [Password](#)

[NY.gov ID - Terms of Service](#)

[Agency Assistance & Contact Information](#)

3. You will automatically be directed to the **Organization Profile 'Recertification Needed' screen**. The navigation menu of the Organization Profile except for the '**Organization Information**' and '**Authorized Preparers**' tab has been greyed out and will remain blocked until the profile has been recertified. If you do not wish to recertify this Organization Profile at this time you can select the Dashboard icon (top left corner) to access your User Profile.



New York State Joint Commission on Public Ethics - Lobbying Application

Lobbyist/Client/PubCorp

Dashboard My Tickets Print Search...

Recertification Needed Download Lobby Group Form - Organization Profile

Verify all information below. Once verified, check that you attest the information is correct and click the recertify button.

Organization Information

Individual Lobbyists

Authorized Preparers

Affiliations

Business Relationship Form List

SOF

Forms

History

Filing Tickets

Full Profile View

Lobbying Organization Editing

Profile ID

Organization Name

CAO

Delegated Administrator

Delegated Administrator Individual ID

Add

HOW TO COMPLETE EMAIL VERIFICATION AND RECERTIFY AN INDIVIDUAL USER AND ORGANIZATION PROFILE

- Please review the Organization name, business address, Delegated Administrator's listed, Authorized Preparers and Contacts (if any) and make any necessary changes. Once completed, click the **'Attestation check box'** and click the green **'Recertify'** button.

The screenshot shows a form with two main sections: 'Contacts' and 'Also Known As'. Each section has a text input field and a green '+' button. Below these sections is a declaration checkbox with the text: 'I declare that the information contained in this filing is true, correct, and complete to the best of my knowledge and belief.' The checkbox is checked. Below the declaration are two buttons: 'Recertify' (green) and 'Cancel' (grey). Red arrows point to the declaration checkbox and the 'Recertify' button.

- The **'Form Selection'** pop-up window will appear. If there were any changes to the **Organization Profile** that should be reflected on any previously submitted filings, select the check-box next to each filing that requires an update. Otherwise, click the **'Check if not updating filings'** check-box and press **'Submit'**.

The screenshot shows a 'Form Selection' pop-up window. It has a title bar with 'Form Selection' and a close button. Below the title bar is a 'Help' link and a message: 'Please select all filings affected by this update'. There is a table with columns: 'Year', 'Period', 'Filing', 'Lobbyist', and 'Client'. The table contains several rows of data. To the right of the table is a column with 'Quick View' links. At the bottom of the table, there is a checkbox labeled 'Check if not updating filings' which is checked. Below the table are two buttons: 'Submit' (green) and 'Cancel' (grey). Red arrows point to the 'Check if not updating filings' checkbox and the 'Submit' button.

- Once the **Organization Profile Recertification** and the **CAO User Recertification** has been successfully completed, the Organization Profile is unlocked, and Filers will have access to all tabs contained in the Organization Profile and will be able to submit filings.

The screenshot shows the 'New York State Joint Commission on Public Ethics - Lobbying Application' interface. The top navigation bar includes 'Dashboard', 'My Tickets', 'Print', a search bar, and the user name 'Anne Smith'. The main content area is titled 'Coalition for Testing Applications - Lobbying Application'. On the left is a sidebar with 'Organization Information' and a list of tabs: 'Individual Lobbyists', 'Authorized Preparers', 'Affiliations', 'Business Relationship Form List', 'SOF', 'Forms', 'History', 'Filing Tickets', and 'Full Profile View'. The main content area shows the 'Coalition' profile with fields for 'Profile ID', 'Organization Name', and 'CAO'. There is an 'EDIT' button in the top right corner of the profile section.

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7. If recertification of an Organization Profile was bypassed when a Filer initially logged in, an Organization will only be able to **save** a Filing. Filings may only be submitted once the Organization and CAO User Profile have **both** been recertified. To recertify an Organization Profile from your dashboard, click the **‘View’** hyperlink next to the name of the Organization Profile listed under **‘Affiliated Organizations’**.

New York State Joint Commission on Public Ethics - Lobbying Application

Lobbyist/Client/PubCorp

Dashboard

My Tickets

Print

Search...

Settings

You have open ticket(s) that require action!

Quick Start

Lobbyist Filings

Registration

Bi-monthly

Disbursement of Public Monies

Client Filings

Client Semi-Annual

Source Of Fundi...

Exemption

Other Filings

Reportable Business Relationship

Create or Claim

Organization Profile

Affiliated Organizations (Filter Dashboard)

All

View

View

View

View

View

View

View

Action Items

Active Contracts (33)

Open Tickets (24)

Saved Filings (59)

Upcoming Filings

Show 10 entries

Search:

ConfNum	Period	Lobbyist/Client	Available Actions

Showing 1 to 10 of 33 entries

Previous

1

2

3

4

Next

Need help?

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