



What to Expect Ahead of the 2021 - 2022 Biennial and Enhancements to the JCOPE Lobbying Application ('LA')

In response to feedback from the filing community, JCOPE staff has been working on enhancements in the Lobbying Application, as well as streamlining reporting requirements for the 2021-2022 Biennial Period. Below are brief descriptions of upcoming changes and staff recommendations to prepare you as we draw nearer to the new Biennial Period.

1. **ALL email addresses must be verified before LA will allow you to submit Filings.** Every CAO and Delegated Administrator of an organization must verify their email or LA will not allow you or your Organization to submit Filings.
2. **The CAO and Preparer of an Organization *can no longer* use the same email address** – To ensure the authenticity of each Individual Profile in LA, the Chief Administrative Officer (“CAO”) and a Preparer cannot use the same email address. Keep in mind, a CAO of an Organization that is a Lobbyist or Client is legally responsible for the veracity, accuracy, and timeliness of all filings submitted on behalf of the organization to JCOPE. A Preparer is an individual assigned by an Organization to submit Filings on its behalf.
3. **ALL Individual and Organization Profiles will require Recertification** – To ensure that Profiles contain the most up-to-date information, every Individual and Organization Profile in LA must be reviewed and recertified by the Profile owner on a yearly basis. Filers will not be able to submit Filings until the Profile has been recertified. JCOPE will provide more information in the coming weeks, including detailed instructions on how Filers may recertify their Profiles.
4. **Verify your username and password information** – If you have not accessed the LA in a while, you should sign in as soon as possible to make sure your login credentials are valid to avoid any unnecessary headaches or filing delays. 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.
5. **Changes to Coalition Organizations and Member Reporting** – New rules regarding reporting of coalition lobbying activity will be in effect for the 2021 Biennial. Coalitions that meet certain criteria will be required to file lobbying reports as a Coalition, but will no longer be required to disclose Coalition Members as Beneficial Clients on their Filings. Reporting related to Coalitions that do not meet certain criteria must be handled by Coalition Members. In addition to disclosing Coalition Name and Contribution amounts, Members will be required to disclose information related to expenses incurred on behalf of the Coalition.

For additional information on these changes please see the attached guidance document to determine if you meet the criteria of either a 'Structured' or 'Unstructured' Coalition.

6. **Reportable Business Relationships and Beneficial Clients** – Where applicable, any entity or individual listed as a Beneficial Client on a Filing will also be required to disclose any Reportable Business Relationships with either a State Person or an Entity in which a State Person has the requisite involvement.

7. **Information for Paper Filers** – Due to enhancements and changes to our existing reporting requirements, new writable PDF forms will be made available for the upcoming 2021 Biennial. DO NOT submit information on the existing Lobbyist/Public Corporation Statement of Registration. An announcement will be made when the new PDF forms are available.
8. **NEW Lobbying Agreement Forms** – A new section has been added to the Lobbying Agreement forms where the Filer can indicate the specific terms that are being amended (compensation change, dates, etc.).
9. **Changes for Entering Itemized Expense Purposes** – For the new Biennial, Filers must select from a drop-down menu to enter ‘Expense Purposes’ related to disclosing Itemized Expenses on either a Lobbyist Bi-monthly Report or Client Semi-Annual Report. We have included a more robust selection of expense purposes in the drop-down menu that will be made available in the coming weeks. *This functionality will be available for the 2021 January/February Bi-Monthly.*
10. **Lobbying Activities** – Significant efforts are being made to enhance how Filers will enter information related to *Parties Lobbied* when disclosing Lobbying Activities. We have streamlined the process to help Filers identify government entities and people related to existing parties. *This functionality will be available for the 2021 January/February Bi-Monthly.*

In the coming weeks, JCOPE will be providing more information on these changes, as well providing a timeline of when we anticipate allowing filers to submit Registrations for the start of the 2021 Biennial in LA and via paper.

Contact Us

- For questions on the Lobbying Application, contact the JCOPE helpdesk at: Helpdesk@jcope.ny.gov
- For questions related to the Lobbyist Statement of Registration, email us at: Registrations@jcope.ny.gov
- For questions on reporting requirements, contact the JCOPE attorney of the day at: Legal@jcope.ny.gov or by phone by calling the JCOPE Hotline at 800-87-ETHICS (873-8442). Press "2" to speak to the attorney of the day.