



New York State Joint Commission on Public Ethics

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Launch of the 2021 Bi-Monthly Reports and Things to Consider When Filing

Today (February 24, 2021), the Commission opened the online Lobbying Application (“LA”) for the submission of Bi-Monthly Reports, and posted updated PDF forms. As indicated earlier, the Commission is allowing additional time to file **Bi-Monthly Reports covering the January-February 2021 reporting period. These Reports will be considered timely if submitted by March 22, 2021.**

Things to consider *before* beginning your first 2021 Bi-Monthly Report

For a user-friendly, streamlined experience, we recommend Filers review each corresponding Statement of Registration **BEFORE** beginning a January/February Bi-Monthly Report. In certain cases, information not previously reported in a Registration cannot be added directly to a Bi-Monthly Report and instead requires you to either submit an amended Registration or update the associated Organization Profile.

CO/SUB LOBBYIST(S)

The name(s) of any Co-Lobbyist and/or Sub-Lobbyist listed on a corresponding Registration will automatically pre-populate on your Bi-Monthly Report. Therefore, **if there has been a change relating to Co/Sub Lobbyists:**

- **We recommend you file a Registration Amendment *BEFORE* beginning the Bi-Monthly Report.** However, you can add new Co- and/or Sub-Lobbyist(s) directly to a Bi-monthly Report if the Co-Lobbyist or Sub-Lobbyist has an existing Profile established in the Lobby Application, and a system-generated Registration Amendment will be created to add the new Co- and/or Sub-Lobbyist(s).

NOTE: System-generated Registration Amendments to add a new Co-Lobbyist will require a new lobbying agreement/authorization.

BENEFICIAL CLIENT(S)

The name(s) of any Beneficial Client(s) listed on the corresponding Registration will automatically

pre-populate on your Bi-Monthly Report. **If there has been a change relating to Beneficial Clients:**

- * LA NO longer allows you to add Beneficial Client(s) directly on your Bi-Monthly Report; however, you can still remove Beneficial Client(s) from the Bi-Monthly Report.

A Registration Amendment adding the *new* Beneficial Client must be filed BEFORE beginning the Bi-Monthly Report in order for LA to automatically populate this information to your Bi-Monthly Report.

NOTE: If you *saved* your Bi-Monthly Report BEFORE submitting your Registration Amendment, the names of any *newly* added Beneficial Client(s) will NOT appear on your Bi-Monthly Report; you must discard your *saved* report and restart. However, if needed, you can contact JCOPE staff to request our assistance to add the *new* Beneficial Client name to your *saved* Bi-Monthly Report.

Organization Profile(s) that do NOT exist in LA but need to be listed on your Bi-Monthly Report

If the Co/Sub Lobbyist or Beneficial Client does NOT already have a Profile established in LA, you will **not** be able to add the Organization name to your Report. You must create a placeholder Organization Profile for each Co and/or Sub Lobbyist, or Beneficial Client you wish to add. Please reference these instructions, ***Step 3: How to Claim or Create Lobbying or Client Organization Profiles (page 10)*** on JCOPE's website.

INDIVIDUAL LOBBYIST(S) INFORMATION (OR IN-HOUSE LOBBYISTS IF FILING A PUBLIC CORPORATION BI-MONTHLY)

- Currently, the name(s) of any Individual Lobbyist(s) listed on the corresponding Registration are available for selection on your Bi-Monthly Report.
- **We recommend you add any *new* Individual Lobbyist(s) to your Organization Profile BEFORE beginning the Bi-Monthly Report so that these new Individual Lobbyist(s) are available for selection on all other reports.**
- You can, however, add *new* Individual Lobbyists directly to a Bi-monthly Report (***Individuals who were NOT previously listed on the Organization's Profile or a previous Bi-Monthly Report***).

Whether you add the *new* Individual in your Bi-monthly Report or through your Organization Profile, LA will also ask you to identify any other Filings you would like to add the *new* Individual(s) to; which will also create system-generated Amendments to those Filings. (**NOTE:** System-generated **Registration Amendments** may require a new lobbying agreement/authorization.)

Resources to Help You

The most up-to-date information for the 2021-2022 Biennial Period can be found at the ['2021-22 Lobbying Biennial Period Information'](#) section of the JCOPE website. Information includes:

- How to Properly Disclose Lobbying Activities (2021 Edition)
- 2021-2022 Coalition Filing Requirements
- 2021-2022 Lobbyist Bi-Monthly Filing Instructions
- 2021-2022 Public Corporation Bi-monthly Filing Instructions
- 2021-2022 How to File a Lobbyist Bi-Monthly in the JCOPE Lobbying Application
- 2021-2022 How to File a Public Corporation Bi-Monthly in the JCOPE Lobbying Application
- 2021-2022 How to File a Disbursement of Public Monies Report in the JCOPE Lobbying Application
- New Lobbyist, Public Corporation and Disbursement of Public Monies Bi-Monthly PDF forms for 'paper filers'

Contact Us

If you have any questions about navigating the LA or for technical assistance, please contact the JCOPE Helpdesk at helpdesk@jcope.ny.gov or by phone at 518-474-3973.

For questions related to the:

- Lobbyist Statement of Registration – email us at registrations@jcope.ny.gov
- Bi-monthly and Disbursement of Public Monies Reports – email us at bimonthlies@jcope.ny.gov
- Client Semi-Annual Report and Source of Funding – email us at CSA@jcope.ny.gov
- Reportable Business Relationship Report – email us at discrepancies@jcope.ny.gov

To speak to the JCOPE Attorney of the Day, email them at legal@jcope.ny.gov or call the JCOPE Hotline at phone at 1-800-87-ETHICS (873-8442) and press '2'.

PLEASE NOTE: We anticipate experiencing a larger than normal call volume due to enhancements in the Lobbying Application, in addition to the start of a new biennial. **The preferred method of contact is via the email addresses listed above.** Emails are responded to in the order they are received. We appreciate your patience during this busy filing period.