


## How to File a Lobbyist Bi-monthly Report in the JCOPE Online Lobbying Application ('LA')

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

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## HELPFUL RECOMMENDATIONS PRIOR TO BEGINNING A BI-MONTLY REPORT

1. Review the corresponding Lobbyist Statement of Registration (or amendment) and determine if you need to include any 'new' Beneficial Clients, Co-Lobbyists, or Sub-Lobbyists that were not previously listed. Please amend your Lobbyist Statement of Registration and add any of the above-mentioned relationships BEFORE attempting to file the corresponding Bi-Monthly report.
2. Review the names of any Individual Lobbyist listed on your organization profile. Add the name(s) of any NEW Individual Lobbyist(s) (or in the case of a Public Corporation any In-House Lobbyists) to your Organization Profile BEFORE starting a Bi-Monthly report. Filers have the ability to add a new Individual Lobbyist to a Bi-Monthly filing, however, the name of that Individual Lobbyist will not automatically copy to the corresponding Organization profile.

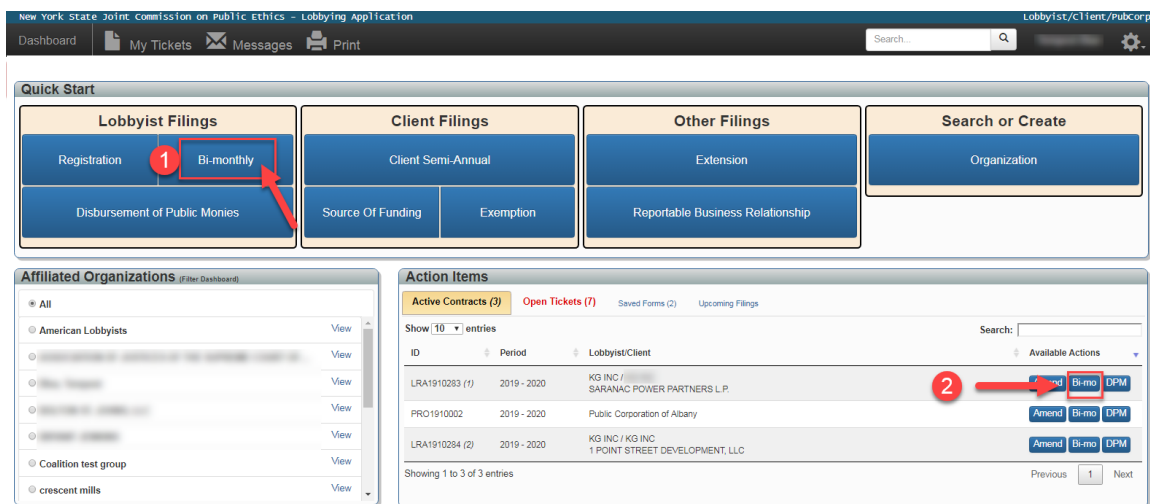
## HOW TO CREATE A BI-MONTHLY REPORT

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

1. Select the 'Bi-monthly' button from the 'Lobbyist Filings' quick start menu;
  - This method requires you manually select the Principal Lobbyist, Contractual Client and Beneficial Client(s).

OR

2. From the 'Action Items' window, click the 'Bi-mo' button that corresponds to the applicable Lobbyist/Client pairing you want to file a Bi-monthly Report for.
  - This method avoids having to manually select the Lobbyist/Contractual Client/Beneficial Client information. (*JCOPE preferred method.*)



## INFORMATION CONTAINED IN A BI-MONTHLY REPORT

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

### BIENNIAL PERIOD\*

Select the biennial period using the 'Year' drop down menu to view a list of corresponding Bi-monthly reports.

### BI-MONTHLY YEAR/PERIOD\*

Click the 'Start' button to begin a new Bi-Monthly report, or select the 'Saved, Not Submitted' hyperlink to open a Bi-monthly report that was previously started. Bi-Monthly reports that have already been submitted will display a 'Submitted Date' in the 'Submitted Date' column.

Year	Period	Start/View Form	Submitted Date
2019 - 2020	2019 January - February	Submitted	
	2019 March - April	Start	05/02/2019
	2019 May - June	Saved, NOT SUBMITTED	
	2019 July - August	Start	
	2019 September - October	Start	
	2019 November - December	Start	
	2020 January - February	Start	
	2020 March - April	Start	
	2020 May - June	Start	
	2020 July - August	Start	
	2020 September - October	Start	
	2020 November - December	Start	



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, click the 'discard' button and review the current Registration before beginning a new Bi-monthly report.

<b>Principal Lobbyist</b> Retained Lobbyist Example	<b>Contractual Client</b> sunflower Fund	<b>Beneficial Clients</b> sunflower Fund
<div>Submit Discard Save Extension Request</div>		

## CO-LOBBYIST(S)/SUB-LOBBYIST(S) INFORMATION (IF APPLICABLE)

The name(s) of any Co-Lobbyist and/or Sub-Lobbyist listed on the corresponding Registration will automatically pre-populate on your Bi-Monthly report. Co-Lobbyists 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. The Principal Lobbyist should NOT be listed as a Co- and/ or Sub-Lobbyist.

You can add *new* Co- and/or Sub-Lobbyist(s) directly to a Bi-monthly Report only if the Co/Sub-Lobbyist already has a profile established in LA. Otherwise, you will be required to 'save' your form and create a 'placeholder' organization profile for each Co/Sub-Lobbyist you wish to add. *Refer to page 10 of the 'Step 3: How to Claim or Create Lobbying or Client Organization Profiles'* on the JCOPE's website.

Any new Co/Sub Lobbyist added 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 updated to include the new Co/Sub Lobbyist information.

**NOTE:** System-generated **Registration Amendments** may require a new lobbying agreement/authorization in the case where a new Co-Lobbyist is added.

### ➤ **To add a new Co-Lobbyist and/or Sub-Lobbyist**

From the *Co/Sub Lobbyist(s)* tab, enter the first few characters of the name in either the 'Add Co-Lobbyist Search' or 'Add Sub-Lobbyist Search' text boxes. To select, click the name of the organization from the list of drop-down search results.

➤ To remove a Co- Lobbyist and/or Sub-Lobbyist

Click the red and white circle 'X' icon located to the right of the name of the organization you wish to remove.

The screenshot shows the 'Lobbyist Bi-monthly' interface. On the left is a sidebar with tabs: Co/Sub Lobbyist(s), Beneficial Client(s), Individual Lobbyists, Comp & Expenses, Lobbying Subjects, Lobbying Activities, and Amendment. The main area is titled 'Co/Sub Lobbyist(s) Information (if applicable)'. It has two sections: 'Co-Lobbyists' and 'Sub-Lobbyists'. Each section has a search bar labeled 'Add Co-Lobbyist Search' and 'Add Sub-Lobbyist Search' respectively, with a placeholder 'Enter Lobbyist Name or Type \* to View list'. Below the search bars are two lists: 'Co-Lobbyists Added' and 'Sub-Lobbyists Added'. The 'Co-Lobbyists Added' list contains one entry: 'TESTCOM, INC., 25 WALKER WAY, ALBANY, NY 12205, United States, p: +1 518-452-0300'. To the right of this entry is a red and white circle 'X' icon, which is highlighted by a red arrow. A 'Continue' button is at the bottom left of the main area.

**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.

**BENEFICIAL CLIENT(S) TAB \***

*The name(s) of any Beneficial Client(s) listed on the corresponding Registration will automatically pre-populate on your Bi-Monthly report.*

On this tab, you can **ONLY** remove Beneficial Client(s) currently listed on the Bi-Monthly report. At least ONE Beneficial Client must be included on a Bi-monthly Report.

➤ To add a Beneficial Client

A Registration Amendment must be filed **BEFORE** you can add a new Beneficial Client not currently listed on the Bi-Monthly report. Once a Registration Amendment has been submitted, the names of any newly added Beneficial Client(s) will appear on your Bi-Monthly report.

**NOTE:** A Registration Amendment must be filed to add a new Beneficial Client **BEFORE** the Bi-Monthly report is started in order for LA to pre-populate this information to your Bi-Monthly report. Once a Registration Amendment has been submitted, the names of any newly added Beneficial Client(s) will **ONLY** appear on your Bi-Monthly report if you discard your saved report and restart. However, if needed, you can contact JCOPE and staff can add the Beneficial Client name to your saved Bi-Monthly.

➤ To remove or modify a Beneficial Client

On the **Beneficial Client(s)** tab, select the red and white circle 'X' icon located to the right of the name of the organization you wish to remove. If you accidentally remove a Beneficial Client in error you will need to discard the saved filing and start again for the name to re-appear, or contact JCOPE and staff will be able to add the Beneficial Client name back for you.

**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.

➤ **Common mistake**

If a pencil icon is displayed, it means you are an authorized person listed on the Beneficial Client Organization Profile. You can amend the Organization name and Contact Information of the Beneficial Client by clicking on the 'pencil' icon. DO NOT use the pencil to change the Beneficial Client listed. Refer to the how 'to add and/or remove/modify a Beneficial Client' information on the previous page .

Beneficial Clients Added	
 Lobbyists R US 123 Lobbying Way Albany, NY 12207 United States p. +1 518-555-1212 e. lobbyrus@gmail.com	

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

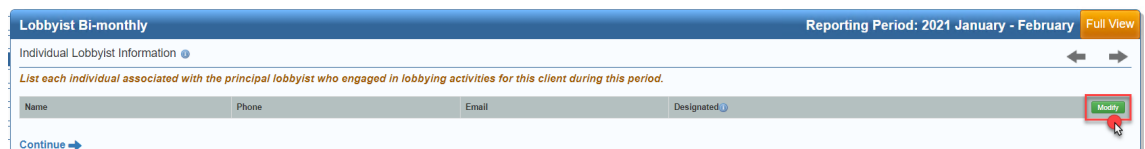
*The name(s) of any Individual Lobbyist(s) listed on the corresponding Registration will automatically pre-populate on your Bi-Monthly report.*

At least one Individual Lobbyist should be listed on any Filing where "Direct Lobbying" is indicated as the Type of Lobbying Activity. 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 of Individual Lobbyists already listed in your Organization Profile**

1. On the **Individual Lobbyist(s)** tab, select the '**Modify**' button.



The screenshot shows the 'Lobbyist Bi-monthly' form with the 'Individual Lobbyist Information' tab selected. The form includes a table with columns for Name, Phone, Email, and Designated. A 'Modify' button is highlighted in the top right corner. The reporting period is set to '2021 January - February'.

- Individual Lobbyist(s) added through your Organization Profile will display on the left-side of your screen – labeled ‘Lobbyists listed on Organization Profile’.

The screenshot shows a window titled 'Individual Lobbyists'. It has two main sections. The left section, 'Lobbyists listed on Organization Profile', shows a list of names: GORE, WEST; Jones, Tempest; Keaton, Client Ben; and Marley, Zennifer. The right section, 'Lobbyists authorized on Bimonthly', shows a list with Jones, Tempest. At the bottom right, there are three buttons: 'Save Changes' (highlighted with a red box and a red arrow), 'Add New Individual Lobbyist', and 'Close'.

- Click 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 ‘Lobbyists authorized on Bi-monthly’.
- Select the ‘Save Changes’ button

➤ **To add a NEW Individual Lobbyist NOT listed in your Organization Profile**

The names of any Individual Lobbyist added within the Bi-Monthly filing **will copy over to the Organization profile**. The preferred method is to add new Individual Lobbyists directly to your Organization profile to avoid duplicating the below steps.

- On the ‘Individual Lobbyists’ tab, select the ‘Modify’ button
- Select the ‘Add New Individual Lobbyist’ button
- Enter the required contact information (denoted by a red asterisk)
- Provide an ‘Effective Date’\*

The Individual Lobbyist’s ‘Effective Date’ 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.

- Select the ‘Add’ button

The screenshot shows the 'Add New Individual Lobbyist' form. It has several input fields: Last Name (Doe), First Name (Janet), Middle Name, Suffix, Email (janet.doe@lobbying.com), Business Phone (+1 518-555-5555), Ext, and Effective Date (12/18/2018). At the bottom right, there are three buttons: 'Add' (highlighted with a red box), 'Manage Lobbyists', and 'Close'.

6. If any of this information you entered matches the name and/or contact information of Individuals who already have existing Profiles in LA, a list of possible matches will display. Carefully review the name of each possible match to avoid creating a duplicate profile in the LA.
7. Select the ‘Add Lobbyist’ button to select the name of an Individual with an existing profile in LA. 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.

The screenshot shows a dialog box titled 'Individual Lobbyists'. It contains a list of potential matches, each with a green 'Add Lobbyist' button. The matches are:

- d, 121231231, 12312  
+1 231-231-2312  
2d12dasdasd@22as.cocm
- Doe, James  
+1 518-408-3976  
jdoe@gmail.com
- Doe, Janet  
+1 518-408-3976  
janetdoe@gmail.com
- Doe, Lucy  
+1 518-408-3976  
ldoe@gmail.com
- Doe, Nancy  
+1 518-408-3976  
ndoe@gmail.com
- Farrell, Pete  
+1 518-555-5555  
peter.farrell@ts.ny.gov

A red box highlights the 'Add Lobbyist' button for 'Doe, Janet'. A red arrow points to the 'None Match' button at the bottom right of the dialog box.

8. Click the ‘Save Changes’ button.

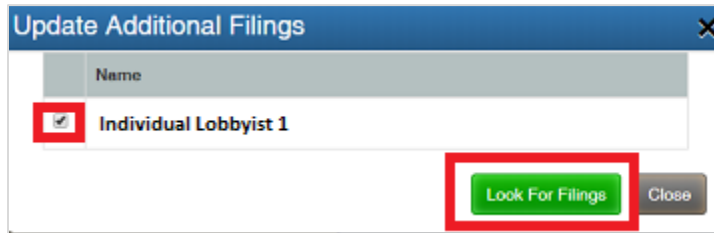
The screenshot shows the 'Individual Lobbyists' dialog box with two panels. The left panel is titled 'Lobbyists listed on Organization Profile' and shows a list of two entries: 'Doe, Nancy' and 'Filer, Doe'. The right panel is titled 'Lobbyists authorized on Bimonthly' and also shows a list of two entries: 'Doe, Nancy' and 'Filer, Doe'. At the bottom right of the dialog box, the 'Save Changes' button is highlighted with a red box. Other buttons at the bottom include 'Add New Individual Lobbyist' and 'Close'.



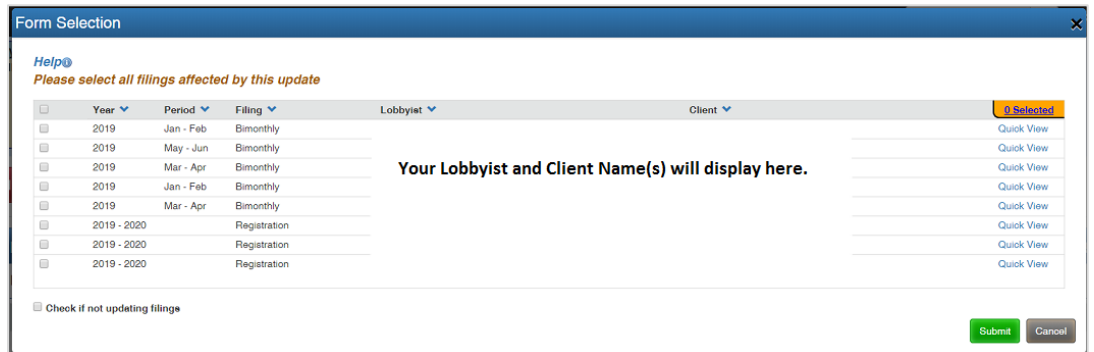
➤ **How to ‘Update Additional Filings’ once a NEW Individual Lobbyist has been added.**

Once a new Individual Lobbyist is added, LA will ask whether you want to add this *new* Individual to any of your other Filings.

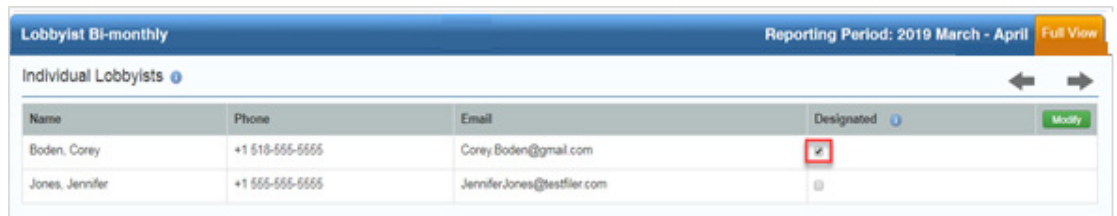
1. Select the check box to the left of the *new* Individual name
2. Click the ‘Look for Filings’ button



3. If you have other Filings in LA, they will be displayed. Select those you wish to update with the *new* Individual name (be sure that Individual Lobbyist was actively lobbying during the reporting period) and click ‘Submit’ to complete the process.
4. If you have no other Filings, select the ‘Check if not updating Filings’ check-box, and click ‘Submit’



5. Select the ‘Close’ button
6. If the Individual Lobbyist is lobbying as a board member, director or officer of the Principal Lobbyist, select the ‘Designated Lobbyist’ check-box.



➤ **To remove an Individual Lobbyist listed on your Bi-monthly Report**

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.

1. On the 'Individual Lobbyists' tab, select the 'Modify' button.
2. Select the name of the Individual Lobbyist you want to remove from the 'Lobbyists authorized on Bi-Monthly' section. Once selected, the Individual Lobbyist is immediately removed from the Filing but will still display within the 'Lobbyists listed on Organization Profile' section.
3. Click 'Save changes'

The screenshot shows a web interface titled 'Individual Lobbyists'. It is divided into two main sections. The left section, 'Lobbyists listed on Organization Profile', has a 'Show 25 entries' dropdown and a 'Filter' input. It contains a table with the following names: GORE, WEST; Jones, Tempest; Keaton, Client Ben; and Marley, Zennifer. The right section, 'Lobbyists authorized on Bimonthly', also has a 'Filter' input and shows 'Jones, Tempest' as the only entry. A red circle and a mouse cursor are positioned over 'Jones, Tempest' in the right section. At the bottom right of the interface are three buttons: 'Save Changes' (green), 'Add New Individual Lobbyist' (blue), and 'Close' (grey).

## COMPENSATION AND EXPENSES \*

Compensation and Expenses must be disclosed during the reporting period in which they are expended, received or incurred.

The 'Compensation and Expenses' section of the Bi-Monthly is comprised of two different reporting sub-categories: 'Compensation and Reimbursed Expenses' and 'Other Lobbying Expenses'.

**Information included in the Compensation and Expenses section:**

➤ **Compensation**

1. Select 'Yes' or 'No' from the drop-down menu to indicate whether you have 'Compensation to Report'.
2. 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.

**Lobbying Agreement Compensation Amount**

For your convenience, the Lobbying Agreement Compensation Amount disclosed on your Statement of Registration is available as a *read only*.

➤ [Reimbursed Expense\(s\)](#)

1. Select 'Yes' or 'No' from the drop-down menu to indicate whether you have '**Reimbursed Expenses to Report**'.
2. 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.

The screenshot shows the 'Lobbyist Bi-monthly' reporting interface for the period of 2019 January - February. The left sidebar contains navigation links: Co/Sub Lobbyist(s), Beneficial Client(s), Individual Lobbyist(s), **Comp & Expenses**, Compensation & Reimbursed Expenses, Other Lobbying Expenses, Lobbying Subjects, Lobbying Activities, and Attestation. The main content area is titled 'Summary of Compensation and Reimbursed Expenses for this period'. It includes a table for 'Lobbying Agreement Compensation (Read only)' with columns for Duration and Compensation. Below this, there are four input fields: 'Compensation to Report' (Yes/No), 'Compensation (Current Period Only)', 'Reimbursed Expenses to Report' (Yes/No), and 'Reimbursed Expenses (Current Period Only)'. The 'Yes' options for both 'to Report' fields are highlighted with red boxes. A 'Continue' button is at the bottom left.

Duration	Compensation
01/01/2019 - 12/31/2020	• \$100 /Hr

Compensation to Report: Yes  No

Compensation (Current Period Only):

Reimbursed Expenses to Report: Yes  No

Reimbursed Expenses (Current Period Only):

Continue ➔

Information included in the '**Other Lobbying Expenses**' section includes aggregate expenses less than \$75, aggregate expenses for salaries of non-lobbying employees, itemized expenses, and Coalition Member Contributions.

➤ [Aggregate Expenses Less than \\$75](#)

1. Enter the total dollar amount of all expenses less than \$75 incurred in the current Bi-Monthly reporting period in the '**Report in the aggregate all expenses less than or equal to \$75**' field.
2. If you have none to disclose, leave the default '0' dollar value.

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

- The Reimbursed Expense Total must be \$0, and
- No other Expenses can be listed on the Bi-monthly Report

➤ [Aggregate Expenses for salaries of non-lobbying employees](#)

1. Disclose salaries of non-lobbying employees' in the '**Report in the aggregate all expenses for salaries of non-lobbying employees**' field.
2. If you have none to disclose, leave the default '0' dollar value.

The screenshot shows the 'Lobbyist Bi-monthly' report form. Under the heading 'Other Lobbying Expenses (Current Period Only)', there are two input fields. The first field is labeled 'Report in the aggregate all expenses less than Or equal to \$75' and contains the value '2500'. The second field is labeled 'Report in the aggregate all expenses for salaries of non-lobbying employees' and contains the value '0'.

➤ Itemized Expenses

Every individual expense **valued greater than \$75** must be reported as an itemized expense.

1. You may indicate you have no 'Itemized Expenses' to report by selecting the 'Check here if you have no itemized expenses to report for this period' check box.

The screenshot shows the 'Report all itemized expenses' section. It features a checkbox labeled 'Check here if you have no itemized expenses to report for this period'. Below this is a table with a header 'Paid To' and a value 'A'. At the bottom, there is a 'Total Expenses (total of all expense categories)' field showing '\$2,500'.

2. To include 'Itemized Expenses' click the green 'Add' button located underneath the 'Report all itemized expenses' sub-heading.

3. Every 'Itemized Expense' disclosed requires the following information be provided:

- a) **Expense Paid To** – Indicate the name of the **Organization or Individual** the Expense was paid to. Indicate the type by selecting the applicable radio button.
- b) **Expense Amount** – Enter the total (Dollar amount) of the Itemized Expense.

The screenshot shows the 'Itemized Expense' form. It has two radio buttons: 'Individual' (selected) and 'Organization'. Below these are fields for 'Expense Paid To', 'Expense Amount', and 'Expense Date (MM/DD/YYYY)'. There is also a checkbox for 'Expense Reimbursed by Client' and a dropdown menu for 'Expense Purpose'. At the bottom, there are three buttons: 'Add', 'Add Another', and 'Close'.

- c) **Indication if the Expense Amount was reimbursed by the Client** – Select the check mark to indicate expense reimbursed by Client.
- d) **Expense Date** – Enter the date of the expense by either clicking on the green calendar icon, or by manually entering the date using a mm/dd/yyyy format. The expense date entered must be any date that falls within the Bi-monthly reporting period.

e) **Expense Purpose**

Select an expense purpose from the drop-down menu.

- Advertising – Billboards
- Advertising – Consulting
- Advertising – Design Services for Media Buy
- Advertising – Flyers/Posters
- Advertising – Media Relations and Strategy
- Advertising – Multi-Platform Media Buy (Print, Online, TV, Web)
- Advertising – Newspaper Inserts
- Advertising – Print Media/Publishing fees over \$500
- Advertising – Social Media Platforms (Facebook, Twitter, Instagram, etc.)
- Advertising - Television
- Advocacy – Civic Engagement/Community Organizing
- Advocacy – Email Marketing/Email Blasts
- Advocacy – Legislative Bill Tracking
- Advocacy – Legislative Research
- Advocacy – Mass Mailings/Bulk Mailing
- Advocacy – Phone Advocacy
- Advocacy – Postage over \$500
- Advocacy – Technology (Cell Phones, iPad, Hotspots)
- Social Event – Booth rentals/Meeting Space Fees
- Social Event – Buses/ Transportation for Lobby Day
- Social Event – Catering/Meals for Lobby Day
- Social Event – Civic Engagement/Community Organizing
- Social Event - Consulting
- Social Event – Equipment and A/V Rentals
- Social Event – Event Sponsorship
- Social Event – Lodging
- Social Event – Parking Fees
- Social Event – Print Fees over \$500
- Social Event – Promotional Materials
- Social Event – Rallies
- Social Event – Reception/Banquet
- Social Event – Rental Fees
- Social Event – Travel Reimbursement (Train, Airfare, Car, Hotel)
- Social Event – Volunteer Training
- Social Media – Media Relations and Strategy
- Social Media – Online Advocacy (sponsored posts)

f) **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:

- Name of individual(s). Multiple individuals can be added.
- 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:**

1. Click the green 'add' button located in the Expense Details section.
2. Enter information
3. Select the '**Add**' button to save and return to the previous screen.

**If the Expense Detail Section requires disclosure of multiple Individuals:**

1. Enter information for one Individual
2. Select the 'Add Another' button to continue.
3. 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***

➤ **Unstructured Coalition Member Contributions (if applicable)**

Fields denoted with a red asterisk \* are required fields.

1. Select the 'Add' button to begin.

**Coalition Member Contribution, if applicable** ⓘ

\*does not apply to a Coalition who opts to file as a Lobbyist or Client

Coalition Name	Contribution Amount (includes time, resources and direct monetary contributions)	Was a Expense incurred on behalf of the Coalition?	Total Amount of the Expense incurred on behalf of the Coalition	Was the Expense paid for using Pooled Funds?	If pooled funds were used, Member's portion of the incurred Expense	Total Contribution Amount (includes contribution and incurred expenses)	Expense Purpose	Add

2. **Coalition Name\***: Enter the name of the 'Unstructured' Coalition in the 'Coalition Name' search text field. If the Coalition already files with JCOPE the application will recognize the name and you will not be required to report the expenses.

**Coalition Dues** ✕

Coalition Name

testin

This Coalition already files with JCOPE; you are not required to report the expenses.

Coalition for Testing Applications

5,000

Was a Expense incurred on behalf of the Coalition?

No

Add Add Another Close

3. **Contribution Amount\***: Report the Contributions given to the Unstructured Coalition including time, resources and direct monetary Contributions. This does NOT include incurred Expenses.
4. **Was an Expense incurred on behalf of the Coalition?** Indicate 'Yes' or 'No' using the drop-down menu. If 'No' was selected, all required information has been included. Select 'Add' to save your changes, or 'Add Another' to report Member Contributions on a different Unstructured Coalition.
5. **Total Amount of the Expense incurred on behalf of the Coalition\***  
Report any **Expenses** incurred by the Member on behalf of the Unstructured Coalition, which can be from the Member's own direct Contributions and/or from the Unstructured Coalition's pool of funds.

6. **Was the Expense paid for using Pooled Funds?**

Indicate 'Yes' or 'No' using the drop-down menu. If 'No' was selected, all required information has been included. Select 'Add' to save your changes, or 'Add Another' to report Member Contributions on a different Unstructured Coalition.

7. **If Pooled Funds were used, Members portion of the Incurred Expense\***

Only report the portion of the **Expense** incurred by the Member. **Example:** If the billboard expense totaled \$25,000 and the Member contributed \$10,000 towards the billboard - \$10,000 would be reported, not the total cost of the billboard.

8. **Expense Purpose\*** – Please reference the full list of Expense Purposes on pages 13-14.

9. Click 'Add' to save your changes, or 'Add Another' to report Member Contributions on a different Unstructured Coalition.

Coalition Dues

\*Coalition Name

\*Contribution Amount (includes time, resources and direct monetary contributions)

Was a Expense incurred on behalf of the Coalition?

Yes

\*Total Amount of the Expense incurred on behalf of the Coalition

Was the Expense paid for using Pooled Funds?

Yes

\*If pooled funds were used, Member's portion of the Incurred Expense

\*Expense Purpose

-- Choose Purpose --

Add

Add Another

Close



## LOBBYING SUBJECTS FOR BI-MONTHLY REPORTING PERIOD\*

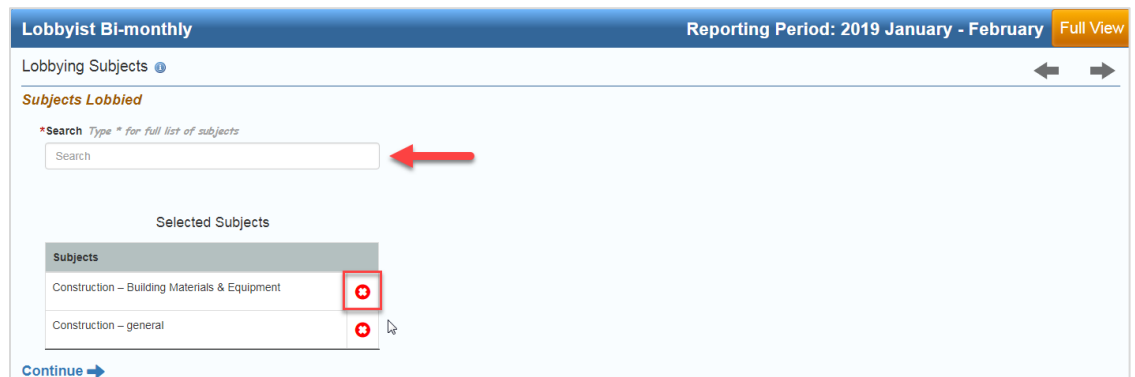
Any 'Subjects Lobbied' listed on the corresponding Registration will automatically pre-populate on your Bi-Monthly report. Changes/modification to any 'Subject' on your Bi-monthly Report has no impact on the associated Registration Filing.

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.

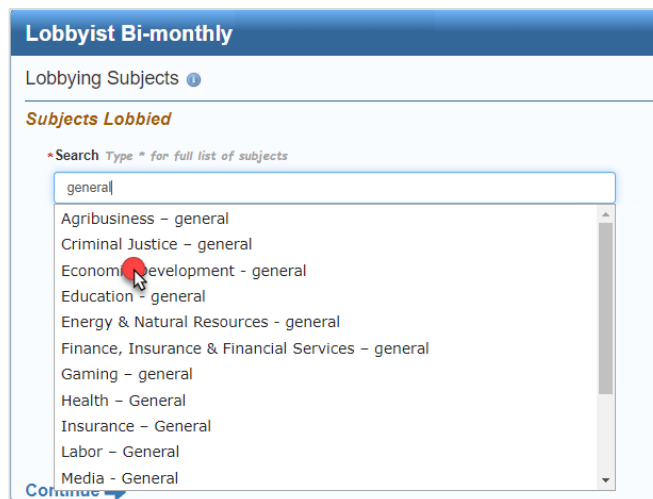
➤ **To add a 'Lobbying Subject'**

1. On the **Lobbying Subjects** tab on your Bi-monthly Report, enter the first few characters of the 'Subject' in the text search box or type the asterisk symbol (\*) in the search field to view the comprehensive list of subjects available for selection.



The screenshot shows the 'Lobbyist Bi-monthly' interface. At the top, it says 'Reporting Period: 2019 January - February' and 'Full View'. Below this is the 'Lobbying Subjects' tab. Under 'Subjects Lobbied', there is a search box with the placeholder text '\*Search Type \* for full list of subjects'. A red arrow points to this search box. Below the search box is a table titled 'Selected Subjects'. The table has two rows: 'Construction - Building Materials & Equipment' and 'Construction - general'. Each row has a red plus icon in a square box to its right, indicating it can be selected. At the bottom left of the table area is a 'Continue' button with a right-pointing arrow.

2. Click the 'Subject' to select it. Repeat this process to select as many 'Subjects Lobbied' as needed.



The screenshot shows the 'Lobbyist Bi-monthly' interface. The search box now contains the text 'genera'. A dropdown menu is open, displaying a list of subject categories. A red circle highlights the 'Economic Development - general' option. The 'Continue' button is still visible at the bottom left.

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

The screenshot shows the 'Lobbyist Bi-monthly' form. At the top is a blue header with the title 'Lobbyist Bi-monthly'. Below it is a section titled 'Lobbying Subjects' with an information icon. Underneath is 'Subjects Lobbied' with a search bar and a note: '\*Search Type \* for full list of subjects'. The 'Selected Subjects' section is highlighted with a red box and contains a table with two rows: 'Media - General' and 'Public Utilities - Telecommunications'. Each row has a red and white circle 'X' icon to its right. At the bottom of the form is a 'Continue' button with a right-pointing arrow.

Selected Subjects	
Subjects	
Media - General	
Public Utilities - Telecommunications	

➤ **To remove a Lobbying Subject**

1. Select the red and white circle 'X' icon next to the name of the Lobbying Subject you wish to remove.

This screenshot shows the same 'Lobbying Subjects' form, but only one subject, 'Media - General', remains in the 'Selected Subjects' table. The red and white circle 'X' icon next to it is highlighted with a red square, indicating it should be clicked to remove the subject.

Selected Subjects	
Subjects	
Media - General	

## 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’.

**Lobbyist Bi-monthly**

Lobbying Activities ⓘ

Do You have Lobbying Activities to Report? Yes ▾

**Type/Level Of Government**

\*Level Of Government

-- Choose Type -- ▾

State Lobbying

Municipal Lobbying

State/Municipal (Both)

### ➤ To add a “Lobbying Focus”

1. Select the ‘Level of Government Lobbied’ (State Lobbying, Municipal Lobbying, or State/Municipal (Both)) from the drop - down menu.
2. Add ‘Focuses’ by selecting the green ‘Update’ button. The ‘Add Lobbying Focuses’ pop-up window will display.

**Lobbyist Bi-monthly** Reporting Period: 2021 January - February Full View

Lobbying Activities ⓘ

Do You have Lobbying Activities to Report? Yes ▾

**Type/Level Of Government**

\*Level Of Government

-- Choose Type -- ▾

State & Municipal Focuses and Parties Lobbied

Show Help

Lobbying Focus Parties Lobbied

Update Update

Preview

Focuses Parties

Add

3. For every Lobbying Focus disclosed, you must indicate the **'Type' of Lobbying Focus**, Lobbying **'Communication'**, and enter a **Focus Identifying # or Description** if an identifying number is unknown.

4. Select a Focus **'Type'** from the drop-down menu. A *Focus Type* is grouped into State and Municipal Level categories. Focus Types available for selection include:

- State Bill
- State Executive Order
- State Funding
- State Land Use
- State Permits/Licensing
- State Procurement
- State Regulation/Rate-making/Rule
- State Resolution
- State Tribal Compact Agreement - NYS Indian Nations

- Municipal Bill
- Municipal Executive Order
- Municipal Funding
- Municipal Land Use
- Municipal Ordinance
- Municipal Permits/Licensing
- Municipal Procurement
- Municipal Regulation/Rate-making-Rule
- Municipal Resolution

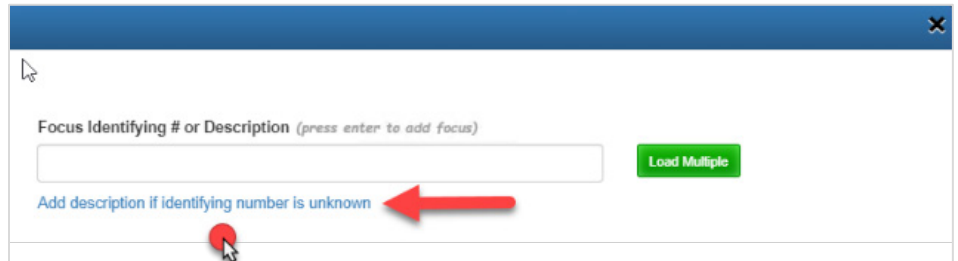
5. Select a **'Type of Communication'** from the drop-down menu. Options available for selection are **Direct Lobbying**, **Grassroots Lobbying**, **Both (Direct/Grassroots)**, or **Monitoring Only**. If you have a Focus to report, **but have not actually Lobbied a specific Party**, you may select **'Monitoring Only'** in the *Type of Communication* drop-down menu.

6. Enter a **'Focus Identifying # or Description'**. A description should ONLY be included if an identifying number is unknown.

- To add a description on a **'State Bill'** you must click the **'Add Description if Identifying Number is unknown'** hyperlink. This hyperlink ONLY appears if

'State Bill' is selected as the 'Focus Type'. Refer to the special formatting requirements that ONLY impact State and Assembly bills below.

- For all other 'Focus Types' you may directly enter the description in the text box.

A screenshot of a web form titled 'Focus Identifying # or Description (press enter to add focus)'. It features a text input field and a green 'Load Multiple' button. Below the input field, there is a blue link that says 'Add description if identifying number is unknown'. A red arrow points to this link, and a red circle with a white 'X' is visible below the input field.

- **For Municipal Level Focuses**, indicate the originating locality in your **description**. EXAMPLE: Municipal Bill on requiring single stream recycling in the Town of Bethlehem, New York.

- **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

7. Hit the '**Enter**' key on your keyboard to save your changes once you entered the identifying number or description.
8. Focuses that have been successfully added will appear in the '**My Focuses**' section. You may also change the 'Communication' Type of any Focus added by clicking on the 'Communication' drop down.
9. To remove a Focus entirely, click the red and white circle 'X' next to the Focus you wish to remove.
10. Click the '**Close**' button to exit the 'Lobbying Focus' screen and return to the main 'Lobbying Activities' screen.

The screenshot shows the 'Lobbying Focuses' window. At the top, there are dropdowns for 'Type' (set to 'State Bill') and 'Communication' (set to '-- Choose Type --'). To the right is a text field for 'Focus Identifying # or Description' and a green 'Load Multiple' button. Below this is a section titled 'My Selected Focuses' with a search bar and a table. The table has columns for 'Type', 'Identifying No./Description', and 'Communication'. It lists 10 focuses, all of which are 'Municipal Bill' types with various identifying numbers. The 'Communication' column for each focus has a dropdown menu. A red arrow points to the 'Load Multiple' button at the bottom right of the window.

➤ **How to disclose multiple State or Municipal Bills using the 'Load Multiple' function**

On the 'Lobbying Activities' tab of your Filing:

1. Select 'Update' in the 'Focuses' box
2. Select either 'State Bill' or 'Municipal Bill' as the 'Focus Type' from the drop-down list
3. Click the green 'Load Multiple' button. Do NOT select anything from the 'Communication' drop-down.

This screenshot is similar to the one above, but the 'Load Multiple' button is highlighted with a red box and a red arrow points to it. The 'Type' dropdown is set to 'State Bill' and the 'Communication' dropdown is set to '-- Choose Type --'.

4. Type (or copy/paste) the bill number of each Senate and/or Assembly Bill, or Municipal Bill in the corresponding 'Communication Type' box. The load multiple function allows you to organize State or Municipal Bills into Direct Lobbying, Grassroots Lobbying, Both (Direct/Grassroots), or Monitoring Only categories.
  - Each bill number must be separated by a comma. *Example:* A1234,S5678 S1234,A4567,A8790,S2345
  - State Senate Bill numbers and Assembly Bill numbers do NOT need to be loaded separately.
  - State Senate and Assembly Bills CANNOT be included together with Municipal Bills. Municipal Bills must be added separately using the 'Load Multiple' function.

5. When finished adding multiple numbers, select the green 'Process' button.

Load Multiple Focuses

Type: State Bill

Direct Lobbying Focuses Enter a list of Focuses separated by comma  
A124566,S788999,A8585855

Grassroots Lobbying Focuses Enter a list of Focuses separated by comma  
S345566,A896555,

Both(Direct/Grassroots) Lobbying Focuses Enter a list of Focuses separated by comma  
A56177 59999

Monitoring Only Lobbying Focuses Enter a list of Focuses separated by comma

Process Back

6. Focuses that have been successfully added will appear in the 'My Focuses' section. You may also change the 'Communication' Type of any Focus added by clicking on the 'Communication' drop down.

7. To remove a Focus entirely, click the red and white circle 'X' next to the Focus you wish to remove.

My Selected Focuses

All State Bill

Show 10 entries

Search:

Type	Identifying No./Description	Communication
State Bill	S4567	Direct
State Bill	A9000-A	Direct

8. Click the 'Close' button to exit the 'Lobbying Focus' screen and return to the main 'Lobbying Activities' screen.

Lobbying Focuses

Add Lobbying Focuses

Type: State Bill

Communication: Choose Type

Focus Identifying # or Description (press enter to add focus)

Add description if identifying number is unknown

Load Multiple

My Selected Focuses

All Municipal Permits/Licensing State Bill Municipal Funding Municipal Ordinance State Procurement Municipal Bill

Show 10 entries

Search:

Type	Identifying No./Description	Communication
Municipal Bill	m44555	Direct
Municipal Bill	f34444	Direct
Municipal Bill	m445666	Direct
Municipal Bill	m34343	Grassroots
Municipal Bill	A23434	Grassroots
Municipal Bill	s34343	Grassroots
Municipal Bill	S87849	Grassroots
Municipal Bill	j75658	Both (Direct/Grassroots)
Municipal Bill	u65858	Both (Direct/Grassroots)
Municipal Bill	u994954	Both (Direct/Grassroots)

Showing 1 to 10 of 19 entries

Previous 1 2 Next

NOTE : This change is effective immediately and will also affect future Bi-monthly Filings. If you wish to change this information on a previous Filing, you must submit a Bi-monthly Amendment.

Close

➤ **Troubleshooting the 'Load Multiple Function'**

1. If a Bill number was accidentally entered twice, it will appear in the '**Duplicate Communication Types**' section.
2. Any bill number that does not meet the formatting requirements will appear in the '**Invalid Focuses**' section in red.
3. You may edit an 'Invalid Focus' directly in the 'Communication Type' box it was originally entered in.
4. When all corrections have been made, click the green '**Process**' button.

**Load Multiple Focuses**

Type: State Bill

Added Focuses

Duplicate Communication Types

Invalid Focuses  
S1254A1254

**Direct Lobbying Focuses** Enter a list of Focuses separated by comma  
S1254A1254

**Grassroots Lobbying Focuses** Enter a list of Focuses separated by comma

**Both(Direct/Grassroots) Lobbying Focuses** Enter a list of Focuses separated by comma

**Monitoring Only Lobbying Focuses** Enter a list of Focuses separated by comma

Process Back



➤ How to include 'Parties Lobbied'

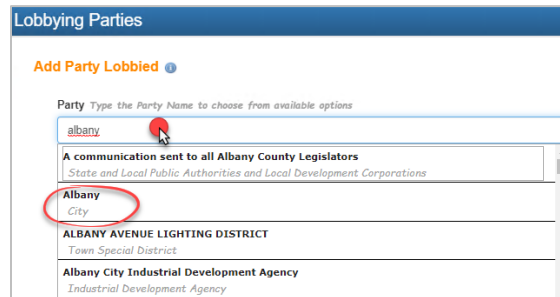
1. From the main Lobbying Activities screen, click the green 'Update' button located beneath in the 'Parties Lobbied' box.



2. From the 'Lobbying Parties' main pop-up window, enter the first few characters of the 'Party Name' name in the text search box. Any Party Lobbied listed in the LA Database identifies a government body and a party name.



- **Search Tips:** Every 'Party' listed in the LA Database contains two components: the 'Government body' and the main 'Party' name. Always search by the 'Party Name' when using the 'Party' search text field. In LA, the 'Government Body' is displayed in light grey italicized lettering, and the main 'Party Name' is indicated by the bold type letter.



- Every main 'Party' name is categorized into specific **Government Bodies**. Below is a list of all government bodies represented in LA.

- Senate Committee
- Assembly Committee
- State Agency
- NYS Assembly
- NYS Senate
- Executive Chamber
- NYS School Districts
- State and Local Public Authorities and Local Development Corporations

- NYC Council Members and 'Communications sent to all [specific County] Legislators'
  - Industrial Development Agency
  - Village
  - Town
  - City
  - County
  - Improvement/Special Districts
    - County Special Districts
    - Town Special Districts
    - Consolidated Health District
    - Fire District
    - Independent Special District
3. To indicate a communication sent to a specific *group of Parties*, type 'A Communication sent to' in the 'Party' text field to display the following options as search results in LA:
- A communication sent to entire Senate
  - A communication sent to entire Assembly
  - A communication sent to entire Legislature
  - A communication sent to all NYC Council Members
  - A communication sent to all [Specific County] Legislators

The screenshot shows a window titled 'Lobbying Parties'. At the top, it says 'Add Party Lobbied'. Below this, there is a section labeled 'Party' with the instruction 'Type the Party Name to choose from available options'. A text input field contains the letter 'A', and a dropdown menu is open, displaying several options: 'A communication sent to all Albany County ...', 'A communication sent to all Allegany Count...', 'A communication sent to all Broome County...', 'A communication sent to all Cattaraugus Co...', and 'A communication sent to all Cayuga County ...'. Each option has a subtext 'NYC Council Members and County Legislators'. To the right of the dropdown is a section labeled 'Additional Party Information' with a 'Close' button.

4. If you select a Party Name and the below box appears with the following message, '*The party Name you selected requires additional information...*' you will be required to include additional information related to the chosen Party.

The screenshot shows the 'Lobbying Parties' window with the 'Selected Party' section. It displays 'Party Name: Albany' and 'Gov Body: City'. Below this, a message states: 'The Party Name you selected requires additional information. Click the green 'add' button to insert; then click the yellow 'process' button to complete.' There are two input fields: 'Unit/Division/Department Lobbied (no acronyms)' and 'First Name/Last Name OR Title of Person Lobbied'. The first field has an 'Add' button to its right. At the bottom, there are 'Process' and 'Cancel' buttons.

5. Click the green 'Add' button to include additional information. You may either enter the:
  - (1) **'Unit/Division/Department Lobbied (no acronyms)'** OR
  - (2) **'First Name/Last Name OR Title of Person Lobbied'**.

**Lobbying Parties**

**Selected Party** ⓘ

Party Name: *Canton Consolidated Health District*

Gov Body: *Consolidated Health District*

Name or Title of Person Lobbied	OR	Unit/Division/Department Lobbied (no acronyms)	
<input type="text" value="Name or Title"/>		<input type="text" value="Unit/Division/Department"/>	<input type="button" value="Add"/>

6. You may include multiple names (or titles) of individuals related to that specific party by clicking the green 'add' button again. To include more than one individual or Unit/Division, enter the information in its own row. **Example:** Janet Doe is entered in the first row indicated by the number 1; while the Mayor's Office is disclosed in the second row indicated by the number 2.

**Lobbying Parties**

**Selected Party** ⓘ

Party Name: *Albany*

Gov Body: *City*

The Party Name you selected requires additional information. Click the green 'add' button to insert; then click the yellow 'process' button to complete.

Unit/Division/Department Lobbied (no acronyms)	OR	First Name/Last Name OR Title of Person Lobbied	
<input type="text" value="Unit/Division/Department"/>		<input type="text" value="Janet Doe"/>	<input type="button" value="Add"/>
<input type="text" value="Mayors Office"/>		<input type="text" value="Name or Title"/>	<input type="button" value="Add"/>

7. Click **'Process'** to save your changes.
8. Once all Lobbying Parties have been added they will display below under the Parties Lobbied section.

➤ How to **Update** a Party Lobbied

1. From the main Lobbying Activities page, click the green 'update' button below the 'Parties Lobbied' box.
2. Click the **'Pencil Icon'** next to the name of the specific Party.

The screenshot shows a window titled "Lobbying Parties" with a close button (X) in the top right corner. Below the title bar, there is a section "Add Party Lobbied" with a sub-label "Party" and a text input field. Below this is a section "Parties Lobbied" containing a table. The table has four columns: "Government Body", "Name", "Additional Party Information", and a red "X" icon in the last column. The table contains four rows of data. The second row, "City", is highlighted with a red box around the "Pencil Icon" in the first column. The "Close" button is at the bottom right.

Government Body	Name	Additional Party Information	
Senate Committee	Aging		X
City	Albany	Mayors Office	X
State Agency	Department of Taxation and Finance	Compliance	X
Senate Committee	New York City Education Subcommittee		X

3. Click the **'Add'** button to include additional information or update existing information. Once completed, click the **'Process'** button to save your changes. The new and/or revised information will display in the **Parties Lobbied** section.

The screenshot shows the "Lobbying Parties" window with the "Selected Party" section. It displays "Party Name: Bethlehem" and "Gov Body: Town". Below this is a form with two rows of input fields. The first row has "Unit/Division/Department Lobbied (no acronyms)" and "First Name/Last Name OR Title of Person Lobbied". The second row has "Unit/Division/Department" and "Name or Title". There are "OR" labels between the columns. Red arrows point to the "Add" button in the top right and the "Process" button in the bottom left. The "Process" button is highlighted with a red box.

Unit/Division/Department Lobbied (no acronyms)	First Name/Last Name OR Title of Person Lobbied	
Unit/Division/Department	Jane Smith	X
Department of Recreation	Name or Title	X

➤ **How to remove a 'Party'**

1. From the 'Lobbying Parties' pop-up window, click the red and white circle 'X' icon next to the Party name you want to remove.

➤ **How to combine or 'marry' a Focus to specific Parties Lobbied**

1. From the main Lobbying Activities screen, select the 'Focus' by clicking the check-box next to the Focus identifying 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). Multiple Parties can be connected or 'married' to a specific Focus by selecting multiple check-boxes.
3. Each checked 'Focus' and 'Party(ies) Lobbied' populates to the 'Preview' box.

- 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. Click the 'Add' button to combine or 'marry' the Focus and Party Information together. The completed Lobbying Activity will display underneath the 'My Selected Focuses' sub-heading.

➤ Only Lobbying Activities that appear under the ‘My Selected Focuses’ section will appear on your submitted filing.

5. Repeat steps 1-4 above for every Lobbying Activity that will be reported on your Bi-Monthly. until you have added all ‘Focuses’ and ‘Party(ies) Lobbied’ to your ‘My Selected Focuses’ section for the Bi-monthly reporting period.

➤ **How to include a Focus that was ‘Monitored Only’**

Lobbying Focuses that indicate ‘Monitoring Only’ as the Type of Lobbying Communication **DO NOT** require Parties Lobbied to be included or combined.

1. Click the check box next to the Lobbying Focus Identifying number or description listed in the ‘Monitoring Only’ Category.
2. Click the green ‘Add’ button. Do not list select any Parties from the ‘Parties Lobbied’ section.
3. The ‘Monitored Only’ Lobbying Focus will appear in the ‘My Selected Focuses’ section and will be included in your submitted Bi-Monthly filing. Repeat these steps for every **Monitored Only** Focus you wish to include.

The screenshot displays the LA Lobbyist Bi-Monthly Report interface. It is divided into several sections:

- Lobbying Focus:** Contains two expandable sections: 'Direct Lobbying (1)' with a checkbox for 'S5428', and 'Monitoring Only (1)' with a checked checkbox for 'S1254'. A red circle with the number '1' highlights the 'Monitoring Only' section.
- Parties Lobbied:** A list of parties with checkboxes. The first two are 'Assembly member Al Taylor, staff member' and 'Assembly member Doug Smith'. The third is 'Bethlehem Department of Recreation'. An 'Update' button is at the bottom.
- Preview:** A table with two columns: 'Focuses' and 'Parties'. The 'Focuses' column contains 'S1254'. A red circle with the number '2' is next to the table, and a red box highlights the 'Add' button at the bottom right.
- My Selected Focuses (only focuses listed below are considered part of this Filing):** A section with tabs for 'All' and 'State Bill'. Below the tabs is a 'Show 10 entries' dropdown and a search bar. A table lists the selected focus: 'State Bill' with focus 'S1254' and communication type 'Monitoring Only'. A red box highlights the 'Monitoring Only' text and a red plus icon. Below the table is a 'Showing 1 to 1 of 1 entries' message and navigation buttons 'Previous', '1', and 'Next'. A 'Continue' button with a right arrow is at the bottom left.

➤ How to **change** the ‘Type of Lobbying Communication’ from a Focus that was listed as ‘**Monitored Only**’

1. If **Monitoring Only** had been selected for a Focus, but now Lobbying will be done on that Focus and the *Communication Type* needs to be updated, select ‘**Update**’, change the *Communication Type* in the drop-down and select ‘**Close**’ to save your changes.

The screenshot shows two parts of the interface. On the left, a 'Lobbying Focus' sidebar lists 'Direct Lobbying (1)' with focus S5428 and 'Monitoring Only (1)' with focus S1254. A red arrow points to the 'Update' button. On the right, the 'Lobbying Focuses' main window shows 'Add Lobbying Focuses' at the top. Below, 'My Selected Focuses' shows a table with two entries: 'State Bill S1254' and 'State Bill S5428'. A dropdown menu for the 'Communication' column of the first entry is open, showing options: 'Monitoring Only' (selected), 'Direct', 'Grassroots', 'Both (Direct/Grassroots)', and 'Monitoring Only' (highlighted in blue). A red arrow points to this dropdown. At the bottom right, a red arrow points to the 'Close' button. A note at the bottom states: 'NOTE : This change is effective immediately and will also affect future Bi-monthly Filings. If you wish to change this information on a previous Filing, you must submit a Bi-monthly Amendment.'

## ATTESTATION

An attestation is required for every filing prior to submission.

1. Check the ‘**Attestation**’ check-box
2. Click the ‘**Submit**’ button. After the filing has been submitted, you may either *view the filing* or *return to the dashboard*.

The screenshot shows the 'Attestation' section of the 'Lobbyist Bi-monthly' filing system. The reporting period is '2021 January - February'. A red box highlights a checkbox with the text: 'I declare under penalty of perjury that the information contained in this filing is true, correct, and complete to the best of my knowledge and belief.' Below this, there are two text input fields: 'Filer Name' with the value 'Doe, Jane' and 'CAO Name' with the value 'Doe, Jane' and a blue checkmark icon.

**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. **JCOPE Preferred Method:** 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.

The screenshot shows the 'New York State Joint Commission on Public Ethics - Lobbying Application' dashboard. The 'Quick Start' section has four main categories: 'Lobbyist Filings', 'Client Filings', 'Other Filings', and 'Search or Create'. Under 'Lobbyist Filings', there are buttons for 'Registration', 'Bi-monthly' (highlighted with a red box and a red arrow), and 'Disbursement of Public Monies'. Under 'Client Filings', there are buttons for 'Client Semi-Annual', 'Source Of Funding', and 'Exemption'. Under 'Other Filings', there are buttons for 'Extension' and 'Reportable Business Relationship'. The 'Search or Create' section has a button for 'Organization'. Below this, the 'Affiliated Organizations' section shows a list of organizations with 'View' links. The 'Action Items' section shows a table of active contracts with columns for ID, Period, Lobbyist/Client, and Available Actions. The first entry is highlighted with a red box around the 'Bi-mo' button in the 'Available Actions' column.

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

The screenshot shows a list of submitted Bi-monthly Reports. At the top, there is a 'Year' dropdown menu set to '2019 - 2020'. Below this is a table with columns for 'Period', 'Start/View Form', and 'Submitted Date'. The first row is highlighted with a red box around the 'Submitted' status in the 'Start/View Form' column.

Period	Start/View Form	Submitted Date
2019 January - February	Submitted	05/03/2019
2019 March - April	Submitted	05/07/2019
2019 May - June	Saved, NOT SUBMITTED	
2019 July - August	Start	
2019 September - October	Start	
2019 November - December	Start	
2020 January - February	Start	
2020 March - April	Start	

**OR**

3. From the 'All My Filings' section of your dashboard, click the 'Bi-monthly' tab, select the filing year from the 'Year' drop down menu and then click the Bi-monthly Lobbyist/Client/Beneficial Client pairing you wish to amend.

The screenshot shows the 'All My Filings' section of the dashboard. The 'Bi-monthly (2)' tab is selected and highlighted with a red box. Below the tabs, there is a table with columns for ID, Period, Lobbyist, Client, Beneficial Client, Submitted, and Status. The first two rows are highlighted with a blue background.

ID	Period	Lobbyist	Client	Beneficial Client	Submitted	Status
LBO1915357	2019 - 2020 2019 Mar - Apr	Lobbyist	Contractual Client	Beneficial Client	05/07/2019	Submitted
LBA1910633 (1)	2019 - 2020 2019 Jan - Feb	Lobbyist	Contractual Client	Beneficial Client	05/03/2019	Submitted
19853 (1)	2019 - 2020 2019 May - Jun	Lobbyist	Contractual Client	Beneficial Client		Saved, NOT SUBMITTED



4. Click the green 'Amend' button at the top of the screen to begin a new Amendment.

The screenshot shows a web interface for filing a 'Lobbyist Bi-monthly Amendment'. At the top left, a green button labeled 'Amend' is highlighted with a red box. The main header area includes 'LBA', 'Lobbyist Bi-monthly Amendment', and 'Reporting Period: 2019 January - February' with a 'Full View' link. Below this is a section for 'Co/Sub Lobbyist(s) Information (if applicable)' with left and right navigation arrows. This section is divided into two columns: 'Co-Lobbyists' and 'Sub-Lobbyists'. Each column has a 'Co-Lobbyists Added' or 'Sub-Lobbyists Added' header and a text box containing 'No Co-Lobbyists' or 'No Sub-Lobbyists'. At the bottom, there is a 'Filing History' button.

## 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

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 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.