

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


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

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HOW TO CREATE A PUBLIC CORPORATION BI-MONTHLY REPORT

There are two different options available on a Filer's Dashboard to create a Public Corporation 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, select the '**Bi-mo**' button that corresponds to the applicable Public Corporation you want to file a Bi-monthly Report for. (Please note that Public Corporation filings start with 'PRO' in the 'ID' column.)

- This method avoids having to manually select the Public Corporation information. (*JCOPE preferred method.*)

The screenshot displays the 'New York State Joint Commission on Public Ethics - Lobbying Application' dashboard. The top navigation bar includes 'Dashboard', 'My Tickets', 'Messages', and 'Print'. The 'Quick Start' section is divided into four main areas: 'Lobbyist Filings', 'Client Filings', 'Other Filings', and 'Search or Create'. Under 'Lobbyist Filings', the 'Bi-monthly' button is highlighted with a red circle and a red arrow labeled '1'. Below this, the 'Action Items' section is visible, showing a table of active contracts. The table has columns for 'ID', 'Period', and 'Lobbyist/Client'. The first entry is 'LRA1910283 (1)' for the period '2019 - 2020' by 'KG INC / SARANAC POWER PARTNERS L.P.'. To the right of this entry, the 'Bi-mo' button is highlighted with a red circle and a red arrow labeled '2'. Other buttons like 'Amend' and 'DPM' are also visible for each entry.

INFORMATION CONTAINED IN A BI-MONTHLY REPORT

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

BIENNIAL PERIOD*

You can select a different Biennial Registration Period from the drop-down menu. Public Corporation Bi-monthly Reports that are available for the corresponding Biennial Registration Period are selectable.

BI-MONTHLY YEAR/PERIOD*

1. Select the 'Start' button or select the 'Saved, Not Submitted' hyperlink next to the corresponding Bi-monthly Year/Period. Public Corporation 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	05/02/2019
	2019 March - April	Start	
	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 **Public Corporation is correct**. If the Public Corporation name is incorrect, click the 'discard' button and review the current Registration before beginning a new Bi-monthly report. Do NOT click the 'pencil icon' to attempt to change the name of the Public Corporation.

COMPENSATION AND EXPENSE AMOUNTS FOR IN-HOUSE AND RETAINED LOBBYISTS*

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 Public Corporation Bi-Monthly is comprised of three different reporting sub-categories: ‘**In-House Lobbyists**’, ‘**Retained Lobbyists**’ and ‘**Other Public Corp Expenses**’.

1. **In-House Lobbyists Sub-tab**

a. **Level of Government**

You must indicate the ‘**Level of Government**’ your *In-House* Lobbyists Lobbied during this reporting period.

- a. State Lobbying
- b. Municipal Lobbying
- c. State/Municipal (Both)

b. **In-House Lobbyists**

The name(s) of any In-House Lobbyist(s) disclosed on your corresponding Public Corporation Registration will automatically pre-populate on your Public Corporation Bi-monthly Report.

Your Public Corporation Bi-monthly Report must disclose the name(s) of any *In-House* Lobbyist that performed Lobbying Activities on behalf of the Public Corporation during the specific Bi-monthly reporting period.

In-House Lobbyist(s) included in your Organization Profile do **NOT** automatically populate to your Public Corporation Bi-monthly Report; however, those Individuals are available to add.

➤ **To add an ‘In-House Lobbyist’ from the names already listed in your [Organization Profile](#)**

1. On the *In-House Lobbyists* tab, select the ‘**Modify**’ button
 - Your Individual Lobbyist(s) added through your Organization Profile will display on the left-side of your screen – labeled “My Lobbyists”

Name	Phone	Email	Designated (y)	Active	Current Compensation
Manney, Joe	+1 666-555-4444	me@me1.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$0

2. Select the **name of the Individual** you want to add to your Public Corporation Bi-monthly Report
 - Once selected, the In-House Lobbyist(s) will be added to the right-side of your screen – labeled “**Selected Lobbyists**”

3. Click the 'Save Changes' button

The screenshot shows the 'In-House Lobbyists' window. On the left, the 'My Lobbyists' tab is active, displaying a list of three entries: 'Loc, Ton', 'Manney, Joe', and 'PENKSA, JANET'. A red circle with the number '1' is placed over the 'Manney, Joe' entry. On the right, the 'Selected Lobbyists' tab is active, displaying a list with one entry: 'Manney, Joe'. A red circle with the number '2' is placed over this entry. At the bottom right of the window, the 'Save Changes' button is highlighted with a red box. Other buttons visible are 'Add New Individual Lobbyist' and 'Close'.

➤ **To add a NEW In-House Lobbyist (Individual is NOT listed in your Organization Profile)**

1. On the *In-House Lobbyists* tab, select the 'Modify' button
2. Select the 'Add New Individual Lobbyist' button

The screenshot shows the 'In-House Lobbyists' window. On the left, the 'My Lobbyists' tab is active, displaying a list of two entries: 'Doe, Lucy' and 'Doe, Nancy'. On the right, the 'Selected Lobbyists' tab is active, displaying a list with two entries: 'Doe, Lucy' and 'Smith, Anne'. At the bottom right of the window, the 'Add New Individual Lobbyist' button is highlighted with a red box. Other buttons visible are 'Save Changes' and 'Close'.

3. Enter the required contact information (denoted by a red asterisk)
4. Provide an **Effective Date***

The In-House Lobbyist's '**Effective Date***' is the earliest date that Individual was authorized to engage in Lobbying Activities for the Public Corporation. The date is used to determine that Individual's online ethics training requirement. This date can be before the 2021 - 2022 biennial period.

5. Select the 'Add' button

The screenshot shows the 'In-House Lobbyist' form for adding a new individual. The form includes fields for: *Last Name, *First Name, Middle Name, Suffix, *Email, *Business Phone, Ext, and *Effective Date. The *Effective Date field is highlighted with a red box. At the bottom right, the 'Add' button is highlighted with a red box. Other buttons visible are '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.
 - A. Select the 'Add Lobbyist' button to select the name of an Individual with an existing profile in LA.
 - B. Otherwise, select the 'None Match' button to create a new Profile for the In-House Lobbyist you are attempting to add. This *new* In-House Lobbyist will be immediately available for selection on other Filings and will be also be added to the list of In-House Lobbyists contained in your Organization's Profile.

In-House Lobbyists

Andrews, Jane +1 518-408-3976	Add Lobbyist
Doe, Jan +1 518-222-2222 jan.doe@gmail.com	Add Lobbyist
Doe, Jane +1 518-408-3976	Add Lobbyist
Doe, Jane +1 518-408-3976	Add Lobbyist
Doe, Jane +1 518-408-3976 jane.doe20@gmail.com	Add Lobbyist
Doe, Janet +1 518-408-3976 janetdoe@gmail.com	Add Lobbyist

B → None Match Back

7. Click the 'Save Changes' button.

In-House Lobbyists

My Lobbyists

Show 25 entries Filter:

Name
Doe, Lucy
Doe, Nancy

Showing 1 to 2 of 2 entries

Selected Lobbyists

Show 3 entries Filter:

Name
Doe, Lucy
Doe, Nancy
Smith, Anne

Showing 1 to 3 of 3 entries

Save Changes Add New Individual Lobbyist Close

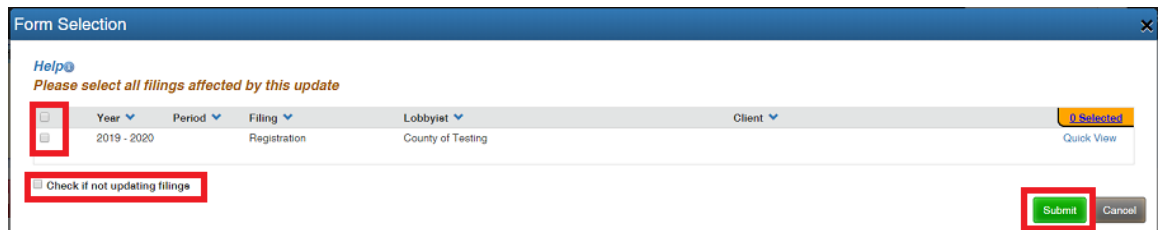
➤ **How to ‘Update Additional Filings’ once a NEW In-House Lobbyist has been added.**

Once a new In-House 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 the filings you wish to update to include the new In-House Lobbyist. Only select filings in which the In-House Lobbyist was actively lobbying during the reporting period.
4. Click ‘Submit’ to update filings.
5. If you have no other Filings, select the ‘Check if not updating Filings’ check-box, and click ‘Submit’



➤ **To remove an In-House Lobbyist listed on your Public Corporation Bi-monthly Report**

1. On the *In-House Lobbyists* tab, select the ‘Modify’ button
2. Select the name of the In-House Lobbyist you want to remove from the right-side of your screen – labeled ‘Selected Lobbyists’
 - Once selected, your In-House Lobbyist is immediately removed from the Filing, but will still display on the left-side of your screen – labeled “My Lobbyists”
3. Click ‘Save changes’

NOTE: Any Individuals removed from a Public Corporation Bi-monthly Report will still be available through the list of the In-House Lobbyists contained in your Organization’s Profile.

➤ **In-House Lobbyist Compensation**

You must provide the Total (Dollar Amount) of Compensation for each In-House Lobbyist for the current Bi-monthly reporting period in the ‘**Current Compensation**’ column. At least one In-House Lobbyist must be listed on any Filing where “Direct Lobbying” is indicated as the Type of Lobbying Activity.

1. If you have no In-House Compensation to disclose in the applicable reporting period you may leave the ‘**0**’ and proceed to the next required section; or

Public Corporation Bi-monthly Reporting Period: 2021 January - February

In-House Lobbyists

Level of Government: -- Choose Type --

List each individual associated with the Public Corporation who engaged in Lobbying Activities during this period

Name	Phone	Email	Designated	Active	Current Compensation	Modify
Manney, Joe	+1 666-555-4444	me@me1.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$0	

Current In-House Compensation Total: \$0

Continue ➔

2. Click the ‘**No Compensation to Report**’ check-box in the **Current In-House Compensation Amount** pop-up window.

Current In-House Compensation Amount

☒ No Compensation To Report

Amount: 0

Save Close

3. If you have Compensation to disclose, click the ‘**\$0**’ hyperlink in the ‘**Current Compensation**’ column, and provide the dollar ‘**Amount**’ in the text box.
4. Select the ‘**Save**’ button when done.
5. If the In-House Lobbyist is lobbying as a board member, director or officer of the Public Corporation, select the ‘**Designated Lobbyist**’ check-box.

Comp & Expenses Public Corporation Bi-monthly Reporting Period: 2019 January - February Full View

In-House Lobbyists

Level of Government: State/Municipal (Both)

List each individual associated with the Public Corporation who engaged in Lobbying Activities during this period

Name	Phone	Email	Designated	Current Compensation	Modify
Tester, Test	+1 777-777-7777	mail1@gov.com	<input checked="" type="checkbox"/>	\$0	

Current In-House Compensation Total: \$0

Continue ➔

2. Retained Lobbyists Sub-tab

Information disclosed by your Retained Lobbyist(s) who have active relationships with the Public Corporation will automatically pre-populate on your Public Corporation Bi-monthly Report.

Your Public Corporation Bi-monthly Report must disclose the name(s) of any *Retained* Lobbyist that performed Lobbying Activities on behalf of the Public Corporation during the specific Bi-monthly reporting period.

➤ To add a NEW Retained Lobbyist (Lobbyist is NOT listed on your Bi-monthly)

1. On the **Retained Lobbyists** tab, enter the first few characters of the 'Retained Lobbyist' Organization name in the text search box;

OR

2. Type the asterisk symbol (*) in the search field to view a list Organizations with existing Profiles in LA.

- If multiple versions of the Organization name appear in the drop down, select the version with the green checkmark next to it. The green checkmark indicates the Profile has been verified by an authorized person. Otherwise, contact the [JCOPE Help Desk](#) for assistance.

The screenshot shows the 'Public Corporation Bi-monthly' reporting interface. On the left is a sidebar with navigation tabs: 'Retained Lobbyists' (selected), 'Other Public Corp. Employees', 'Lobbying Subjects', 'Lobbying Activities', 'Education', and 'Activity'. The main area is titled 'Retained Lobbyists' and includes a search box labeled 'Retained Lobbyist Search' with the placeholder text 'Enter Lobbyist Name or Type * to View List'. A dropdown menu is open, showing a list of organizations: 'test' (with a green checkmark), 'Test Contractual Client', 'Test for CW-PC', 'Test Organization', 'test orphan', 'test pc', and 'TESTCOM, INC.'. To the right of the search box is a table with columns 'Reg Compensation' and 'Current Period Compensation'. The table is currently empty, and a red error icon is visible in the bottom right corner of the table area.

➤ If a Profile does not yet exist for the 'Retained Lobbyist'

You can add a *new* Retained Lobbyist directly to a Public Corporation Bi-monthly Report only if the Retained 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 Retained Lobbyist you wish to add. **Refer to page 10 of the 'Step 3: How to Claim or Create Lobbying or Client Organization Profiles'** on JCOPE's website. Once this step has been completed, you can open your saved/not submitted Bi-Monthly and add the *new* Retained Lobbyist.

➤ **To remove or modify a 'Retained Lobbyist'**

1. On the **Retained Lobbyists** tab, select the red and white circle 'X' icon.
2. If you are an authorized person, you can amend your '**Retained Lobbyist**' information by selecting the '**pencil**' icon in the Action column.

NOTE: Removal of a **Retained Lobbyist** does **NOT** create an Amendment and/or Termination. Removing a **Retained Lobbyist** from a Public Corporation Bi-monthly Report has no impact on any associated Registration Filing. If your relationship has terminated, you must submit either a Registration Amendment, or Termination.

Public Corporation Bi-monthly

Reporting Period: 2019 March - April

Retained Lobbyists

If applicable, list the name of each Retained Lobbyist who is retained to perform Lobbying Activities on behalf of the Public Corporation.

Retained Lobbyist Search Enter Lobbyist Name or Type * to View list

Click here to create Retained Lobbyist Profile that does not exist yet

Info	Reg Compensation	Current Period Compensation
<p>Test 123 street albany, NY 12144-4444 United States p.+1 123-456-7891 e-Test@test.com</p>	<p>• \$5,000 /Mo</p>	<p>\$0</p>

Current Retained Lobbyists Compensation Total: \$0

Continue →

3. If the Retained Lobbyist name and/or contact information appears inaccurate to you, select the *exclamation point* symbol. Check the field(s) you think are incorrect/inaccurate and click '**Save**' when done. The online application will alert the Retained Lobbyist their information may require a Profile Update.

Profile Inquiry

Profile: JCOPE Test

Check fields which you think need updating

Fields In Question

☒ Name
☐ Address
☐ Phone

Save Close

➤ **Retained Lobbyist Compensation**

You must provide the Total (Dollar Amount) of Compensation paid to each Retained Lobbyist for the current Bi-monthly reporting period in the ‘**Current Period Compensation**’ column.

1. If you have no compensation to disclose, you may leave the default ‘**0**’ dollar amount and proceed to the next required section; or

Public Corporation Bi-monthly Reporting Period: 2021

Retained Lobbyists

If applicable, list the name of each Retained Lobbyist who is retained to perform Lobbying Activities on behalf of the Public Corporation.

Retained Lobbyist Search Enter Lobbyist Name or Type * to View list

Info	Reg Compensation	Current Period Compensation
<div>Lobbyists R US 123 Lobbying Way Albany, NY 12207 United States p. +1 518-555-1212 e. lobbyrus@gmail.com</div>		\$0

2. Click the ‘**\$0**’ hyperlink to open the ‘**Current Retained Lobbyist Compensation Amount**’ pop-up window. From this pop-up screen you may either:
 - Select the ‘**No Compensation to Report**’ checkbox to report \$0 compensation for the applicable reporting period; OR
 - Enter the compensation paid to the Retained Lobbyist in the ‘**Amount**’ text box.

Current Retained Lobbyist Compensation Amount

☐ No Compensation To Report

Amount

5,000

Save **Close**

3. Click the ‘**Save**’ button to continue.

3. Other Public Corporation Expenses

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

➤ Expenses

A. 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.

B. 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.

Public Corporation Bi-monthly

Other Public Corporation Expenses (Current Period Only)

Report in the aggregate all expenses less than or equal to \$75

0

Report in the aggregate all expenses for salaries of non-lobbying employees

0

Report in the aggregate all itemized expenses exceeding \$75

☐ Check here if you have no itemized expenses to report for this period

Paid To	Amount
---------	--------

Total Expenses (total of all expense categories)

\$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.

Report all itemized expenses

☐ Check here if you have no itemized expenses to report for this period

Paid To	Amount
---------	--------

Total Expenses (total of all expense categories)

\$2,500

2. To include 'Itemized Expenses' click the green 'Add' button located underneath the 'Report in the aggregate all itemized expenses exceeding \$75' sub-heading.

The screenshot shows a form section titled "Report in the aggregate all itemized expenses exceeding \$75". It includes a checkbox "Check here if you have no itemized expenses to report for this period". Below this is a table with columns: "Paid To", "Amount", "Date", and "Purpose". A red arrow points to a green "Add" button at the end of the table header. Below the table is a "Total Expenses (total of all expense categories)" field showing "\$0". Further down is a section for "Coalition Member Contribution, if applicable" with a table that has columns: "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 expense)", and "Expense Purpose". A green "Add" button is at the bottom right of this table. A "Continue" button with a right arrow is at the bottom left.

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 a title bar "Itemized Expense" with a close button. Inside, there are two radio buttons: "Individual" (selected) and "Organization". Below are fields for "Expense Paid To" (text input), "Expense Amount" (text input), and a checkbox "Expense Reimbursed by Client". There is a dropdown menu for "Expense Purpose" with the text "-- Choose Purpose --". Below that is a date field for "Expense Date (MM/DD/YYYY)" with a green calendar icon. At the bottom right are three buttons: "Add" (green), "Add Another" (green), and "Close" (red).

- 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.

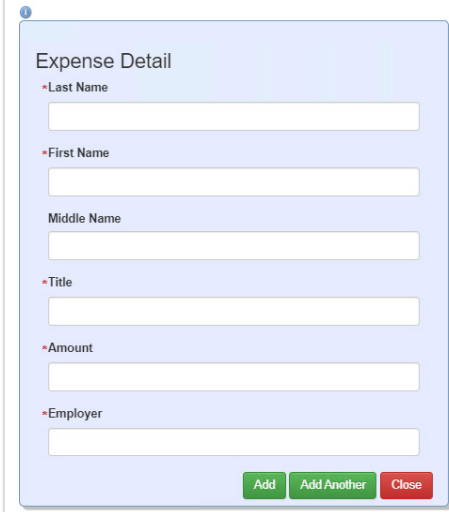
The screenshot shows the 'Itemized Expense' form. The 'Organization' radio button is selected and highlighted with a red box. The form includes fields for 'Expense Paid To', 'Expense Amount', 'Expense Reimbursed by Client' (checkbox), 'Expense Purpose' (dropdown), and 'Expense Date' (calendar icon). At the bottom, there is an 'Expense Details (Optional)' section with a table with columns: Name, Title, Amount, Employer, and an 'Add' button. Below the table are 'Add', 'Add Another', and 'Close' buttons.

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.

A screenshot of a web form titled "Expense Detail". The form has a light blue background and contains several input fields. The fields are labeled: "Last Name", "First Name", "Middle Name", "Title", "Amount", and "Employer". Each label is preceded by a red asterisk. At the bottom right of the form, there are three buttons: "Add" (green), "Add Another" (green), and "Close" (red).

Expense Detail

*Last Name

*First Name

Middle Name

*Title

*Amount

*Employer

Add Add Another Close

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 Public Corporation *Bi-monthly* and *Bi-monthly Amendment* Instructions for examples**

➤ **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*

Lobbying Subjects disclosed on your corresponding Public Corporation Registration will automatically pre-populate on your Public Corporation Bi-monthly Report.

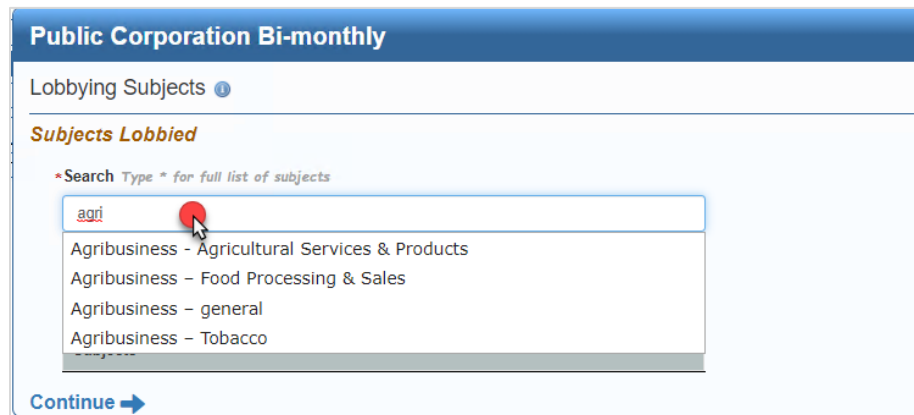
At least one ‘Lobbying Subject’ is required to be disclosed on each Bi-monthly Report. Lobbying Subjects identify the specific subject matter area(s) on which Lobbying occurred. These Subjects identify the Public Corporation’s ‘Nature of Business’.

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.

NOTE: Changes/modification to any ‘Subject’ on your Public Corporation Bi-monthly Report has no impact on the associated Registration Filing.

➤ 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.



Public Corporation Bi-monthly

Lobbying Subjects ⓘ

Subjects Lobbied

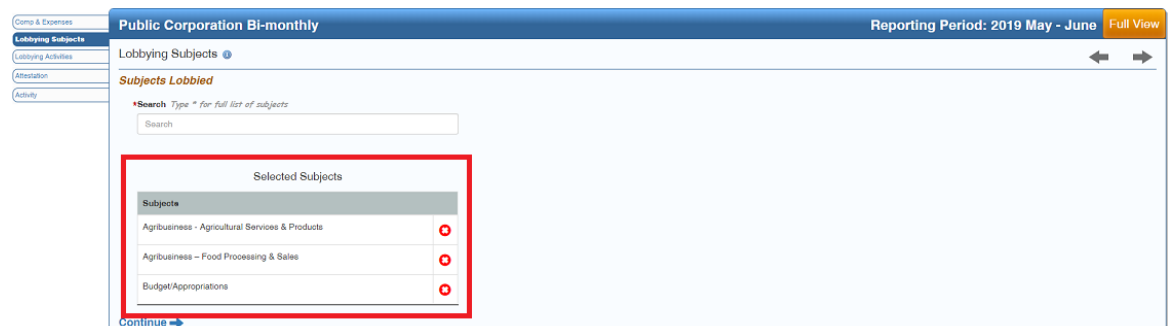
*Search Type * for full list of subjects

agri

- Agribusiness - Agricultural Services & Products
- Agribusiness - Food Processing & Sales
- Agribusiness - general
- Agribusiness - Tobacco

Continue ➔

2. Click the ‘Subject’ to select it. Repeat this process to select as many ‘Subjects Lobbied’ as needed.
3. A ‘Lobbying Subject’ that has been successfully added to a Filing is displayed in the ‘Selected Subjects’ area below the ‘search field’.



Public Corporation Bi-monthly

Reporting Period: 2019 May - June Full View

Lobbying Subjects ⓘ

Subjects Lobbied

*Search Type * for full list of subjects

Search

Selected Subjects

Subject	
Agribusiness - Agricultural Services & Products	○
Agribusiness - Food Processing & Sales	○
Budget Appropriations	○

Continue ➔

➤ **To remove a Lobbying Subject**

1. On the **Lobbying Subjects** tab on your Public Corporation Bi-monthly Report, select the red and white circle 'X' icon.

The screenshot shows the 'Public Corporation Bi-monthly' report interface. The 'Lobbying Subjects' tab is active. Below the 'Subjects Lobbied' section, there is a search bar and a table of 'Selected Subjects'. The table has one entry: 'Gaming - general'. To the right of this entry is a red and white circle 'X' icon, which is highlighted by a red arrow. Below the table is a 'Continue' button with a right-pointing arrow.

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 'Focuses' and 'Parties Lobbied'.

The screenshot shows the 'Public Corporation Bi-monthly' report interface for the reporting period of 2021 January - February. The 'Lobbying Activities' tab is active. A dropdown menu is open for the question 'Do You have Lobbying Activities to Report?', showing options 'Yes', 'Yes', and 'No'. A red arrow points to the 'Yes' option. Below the dropdown, there are two red boxes labeled 'Lobbying Focus' and 'Parties Lobbied'. To the right, there is a 'Preview' section with a table showing 'Focuses' and 'Parties'. At the bottom of the 'Lobbying Focus' and 'Parties Lobbied' sections are 'Update' buttons. At the bottom of the 'Preview' section is an 'Add' button.

➤ **To add a “Lobbying Focus”**

1. Add ‘Focuses’ by selecting the green ‘Update’ button. The ‘Add Lobbying Focuses’ pop-up window will display.

The screenshot shows the 'Public Corporation Bi-monthly' report interface. The 'Lobbying Activities' section is active. A red arrow points to the 'Update' button at the bottom of the 'Lobbying Focus' table. The 'Parties Lobbied' table is also visible. A 'Preview' section on the right shows a table with 'Focuses' and 'Parties' columns.

2. 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.

The screenshot shows the 'Add Lobbying Focuses' pop-up window. It has three input fields: 'Type' (1), 'Communication' (2), and 'Focus Identifying # or Description' (3). The 'Type' field is a dropdown menu, and the 'Communication' field is a dropdown menu. The 'Focus Identifying # or Description' field is a text input.

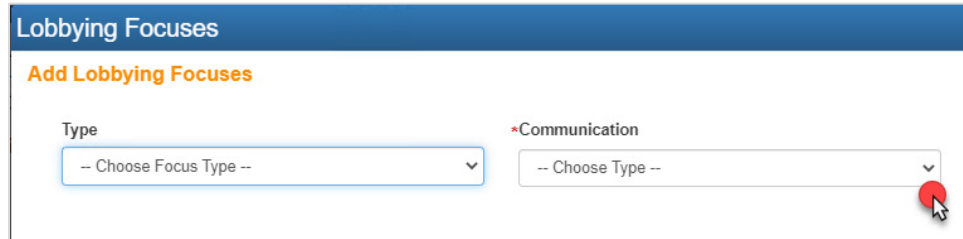
3. Select a Focus ‘Type’ from the drop-down menu. A *Focus Type* is grouped into State and Municipal Level categories. Focus Types available for selection include:

- 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

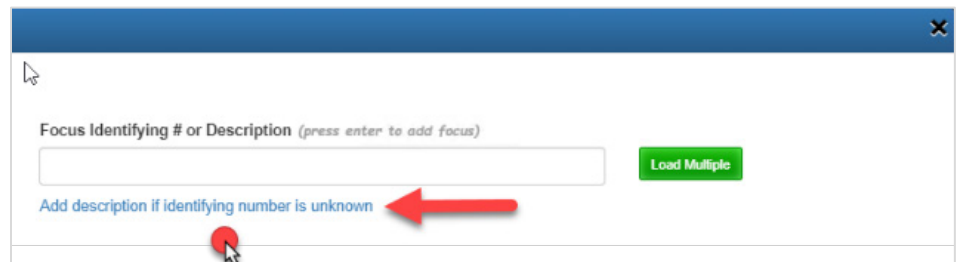
The screenshot shows the 'Add Lobbying Focuses' pop-up window. The 'Type' dropdown menu is highlighted with a red circle, and a mouse cursor is pointing at the dropdown arrow.

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

4. 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.



5. 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.



- **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

6. Hit the **'Enter'** key on your keyboard to save your changes once you entered the identifying number or description.
7. 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.
8. To remove a Focus entirely, click the red and white circle **'X'** next to the Focus you wish to remove.
9. 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's a section for 'Add Lobbying Focuses' with dropdowns for 'Type' (set to 'State Bill') and 'Communication' (set to '-- Choose Type --'). A text field for 'Focus Identifying # or Description' is also present, along with a green 'Load Multiple' button. Below this is the 'My Selected Focuses' section, which contains a table with 10 entries. The table has columns for 'Type', 'Identifying No./Description', 'Communication', and a red 'X' icon. The 'Communication' column has a dropdown menu open, showing options like 'Direct', 'Grassroots', and 'Both (Direct/Grassroots)'. A red arrow points to the 'Close' 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.

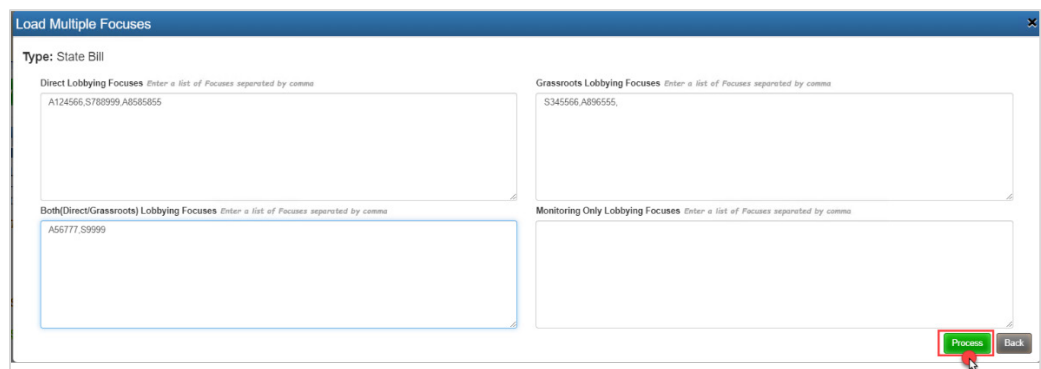
The screenshot shows the 'Lobbying Focuses' window. The 'Add Lobbying Focuses' section is visible. The 'Type' dropdown is set to 'State Bill'. The 'Communication' dropdown is set to '-- Choose Type --'. The 'Focus Identifying # or Description' text field is empty. The green 'Load Multiple' button is highlighted with a red box, and a red arrow points to it.

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.

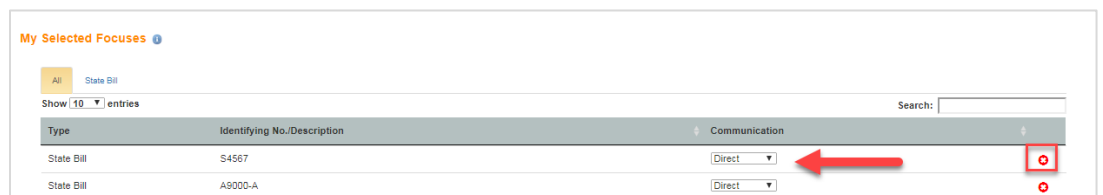
- Each bill number must be separated by a comma. *Example:* A1234,S5678 S1234,A4567,A8790,S2345
- State Senate Bill numbers and Assembly Bill numbers do NOT need to be loaded separately.
- State Senate and Assembly Bills CANNOT be included together with Municipal Bills. Municipal Bills must be added separately using the 'Load Multiple' function.

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



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.



8. 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 'Direct'). A 'Load Multiple' button is visible. Below this is a section titled 'My Selected Focuses' with a table of 10 entries. The table has columns for 'Type', 'Identifying No./Description', and 'Communication'. A red arrow points to the 'Communication' dropdown menu for the first entry. At the bottom right, there is a 'Close' button with a red arrow pointing to it.

Type	Identifying No./Description	Communication
Municipal Bill	m44555	Direct
Municipal Bill	f34444	Direct
Municipal Bill	m45666	Direct
Municipal Bill	m34343	Grassroots
Municipal Bill	A23434	Grassroots
Municipal Bill	s34343	Grassroots
Municipal Bill	S87849	Grassroots
Municipal Bill	J75858	Both (Direct/Grassroots)
Municipal Bill	u85858	Both (Direct/Grassroots)
Municipal Bill	u994954	Both (Direct/Grassroots)

➤ **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.

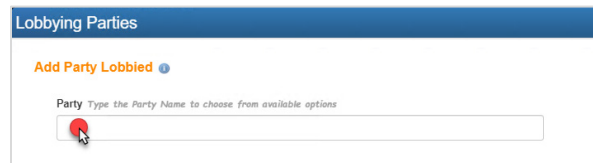
The screenshot shows the 'Load Multiple Focuses' window. It has a 'Type: State Bill' label. Below this are three sections: 'Added Focuses' (green text), 'Duplicate Communication Types' (blue text), and 'Invalid Focuses' (red text). The 'Invalid Focuses' section contains the text 'S1254A1254' with a red arrow pointing to it. Below these sections are four text input fields for 'Direct Lobbying Focuses', 'Grassroots Lobbying Focuses', 'Both(Direct/Grassroots) Lobbying Focuses', and 'Monitoring Only Lobbying Focuses'. At the bottom right, there is a green 'Process' button and a grey 'Back' button.

➤ **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**' 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

- NEW – 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 the 'Lobbying Parties' form. The 'Party' field is active, displaying a dropdown menu with the following options:

- A communication sent to all Albany County ...
NYC Council Members and County Legislators
- A communication sent to all Allegany Count...
NYC Council Members and County Legislators
- A communication sent to all Broome County...
NYC Council Members and County Legislators
- A communication sent to all Cattaraugus Co...
NYC Council Members and County Legislators
- A communication sent to all Cayuga County ...
NYC Council Members and County Legislators

The 'Additional Party Information' section is visible but empty. A 'Close' button is at the bottom right.

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' form with the 'Selected Party' section. The 'Party Name' is 'Albany' and the 'Gov Body' is 'City'. 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.'

Below the message are two input fields:

- Unit/Division/Department Lobbied (no acronyms)
- First Name/Last Name OR Title of Person Lobbied

Buttons for 'Process', 'Cancel', and 'Add' are at the bottom.

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'.

The screenshot shows the 'Lobbying Parties' form. Under 'Selected Party', the 'Party Name' is 'Canton Consolidated Health District' and the 'Gov Body' is 'Consolidated Health District'. There are two input fields: 'Name or Title' (labeled 1) and 'Unit/Division/Department Lobbied (no acronyms)' (labeled 2). A green 'Add' button is to the right of the second field. At the bottom, there are 'Process' and 'Cancel' buttons.

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.

The screenshot shows the 'Lobbying Parties' form with 'Party Name' as 'Albany' and 'Gov Body' as 'City'. 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 rows of input fields. The first row has 'Unit/Division/Department Lobbied (no acronyms)' as 'Unit/Division/Department' and 'First Name/Last Name OR Title of Person Lobbied' as 'Janet Doe' (labeled 1). The second row has 'Unit/Division/Department Lobbied (no acronyms)' as 'Mayors Office' (labeled 2) and 'First Name/Last Name OR Title of Person Lobbied' as 'Name or Title'. Each row has a green 'Add' button. At the bottom, there are 'Process' and 'Cancel' buttons.

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 the 'Lobbying Parties' form with the 'Add Party Lobbied' section at the top. Below it is the 'Parties Lobbied' section, which contains a table with the following data:

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

A red box highlights the 'Pencil Icon' next to the 'City' entry. At the bottom right, there is a 'Close' button.

- 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.

➤ **How to remove a 'Party'**

- 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**

- From the main Lobbying Activities screen, select the **'Focus'** by clicking the check-box next to the Focus identifying number or description.
- 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.
- Each *checked* **'Focus'** and **'Party(ies) Lobbied'** populates to the **'Preview'** box.

The screenshot shows a web interface for filing a Public Corporation Bi-monthly Report. It is divided into three main sections: 'Lobbying Focus', 'Parties Lobbied', and 'Preview'.
1. 'Lobbying Focus' contains two expandable sections: 'Direct Lobbying (1)' with a checked checkbox for 'S5428', and 'Monitoring Only (1)' with an unchecked checkbox for 'S1254'. A green 'Update' button is at the bottom.
2. 'Parties Lobbied' contains a list of parties with checkboxes: 'Assembly member Al Taylor, staff member' (unchecked), 'Assembly member Doug Smith' (checked), 'Bethlehem' (checked), and 'Department of Recreation' (checked). A green 'Update' button is at the bottom.
3. 'Preview' shows a table with two columns: 'Focuses' and 'Parties'. The 'Focuses' column lists 'S5428'. The 'Parties' column lists 'Assembly member Doug Smith', 'Bethlehem', and 'Department of Recreation'. A green 'Add' button is to the right of the table.

- To remove a 'Focus' and/or 'Party(ies) Lobbied' from the 'Preview' box, un-select the checkbox 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. these steps 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.

Lobbying Focus

▼ Direct Lobbying (1)

☐ S5428

▼ Monitoring Only (1)

☒ S1254

1

Update

Parties Lobbied

☐ Assembly member Al Taylor, staff member

☐ Assembly member Doug Smith

☐ Bethlehem
Department of Recreation

Update

Preview

Focuses	Parties
S1254	

2

Add

My Selected Focuses (only focuses listed below are considered part of this Filing)

All State Bill

Show 10 entries

Search:

Type	Focus	Parties	Communication
State Bill	S1254		Monitoring Only +

Showing 1 to 1 of 1 entries

Previous 1 Next

Continue ➔

➤ **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.

Lobbying Focus

▼ Direct Lobbying (1)

☐ S5428

▼ Monitoring Only (1)

☐ S1254

Update

Lobbying Focuses

Add Lobbying Focuses

Type -- Choose Focus Type --

*Communication -- Choose Type --

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

My Selected Focuses ⓘ

All State Bill

Show 10 entries

Search:

Type	Identifying No./Description	Communication
State Bill	S1254	Monitoring Only +
State Bill	S5428	+

Showing 1 to 2 of 2 entries

Previous 1 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

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 'Public Corporation Bi-monthly' reporting interface for the period of 2019 January - February. At the top, there are three buttons: 'Submit' (highlighted with a red box), 'Discard', and 'Save'. Below these is a sidebar with navigation links: 'Comp & Expenses', 'Lobbying Subjects', 'Lobbying Activities', 'Attestation' (which is selected and highlighted in blue), and 'Activity'. The main content area is titled 'Attestation' and contains a declaration statement: '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 statement are two text input fields: 'Filer Name' with the value 'Blue, Tempest' and 'CAO Name' with the value 'Devina, Tempest'. At the bottom of the form is a 'Continue' button with a right-pointing arrow.

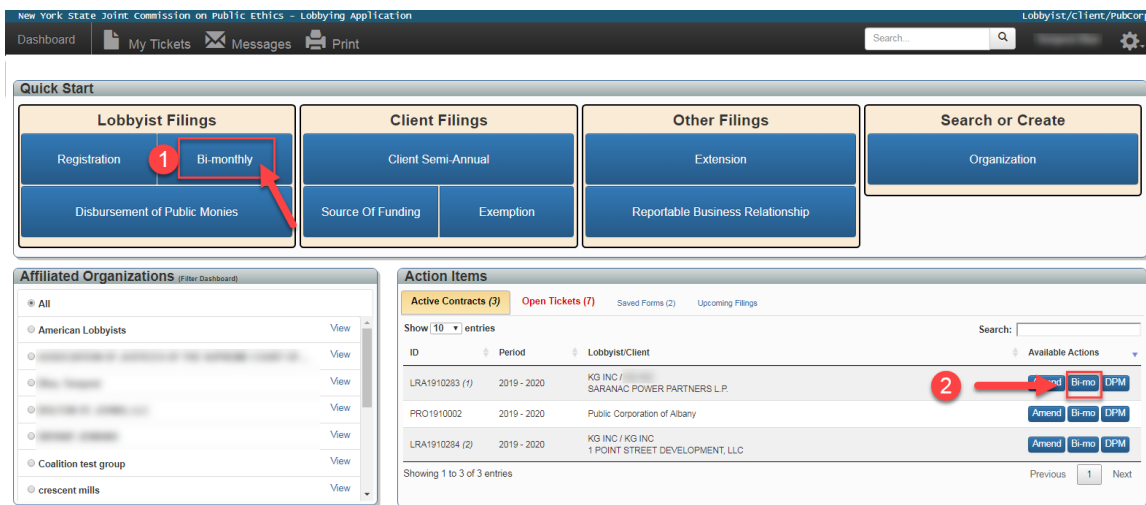
Congratulations you are all done!

How to File an Amended Public Corporation Bi-Monthly Report

To create an Amended Public Corporation Bi-monthly Report:

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

1. Select the 'Bi-monthly' button from the 'Lobbyist Filings' quick start menu;



OR

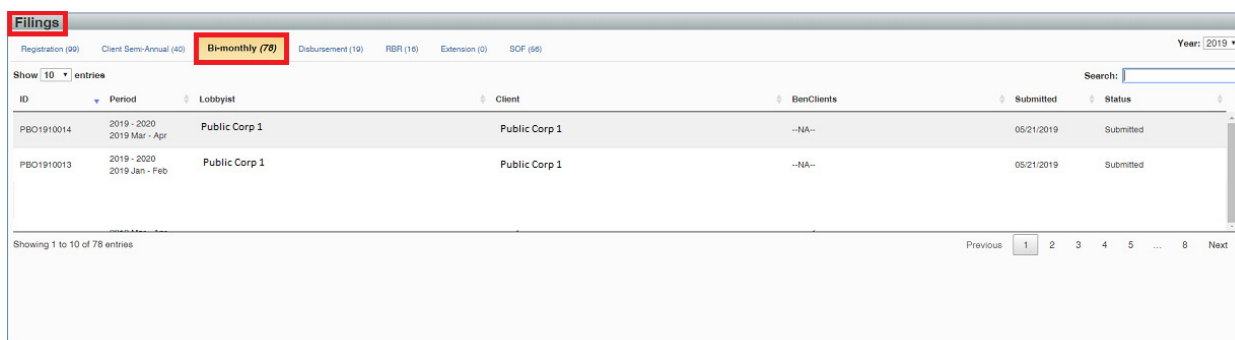
2. **JCOPE Preferred Method:** From the 'Action Items' window, select the 'Bi-mo' button that corresponds to the applicable Public Corporation you want to file an Amended Bi-monthly Report for.
3. Select the Bi-monthly Report from the list of submitted Bi-monthly Reports.

Year: 2019 - 2020

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	
2020 May - June	Start	
2020 July - August	Start	
2020 September - October	Start	
2020 November - December	Start	

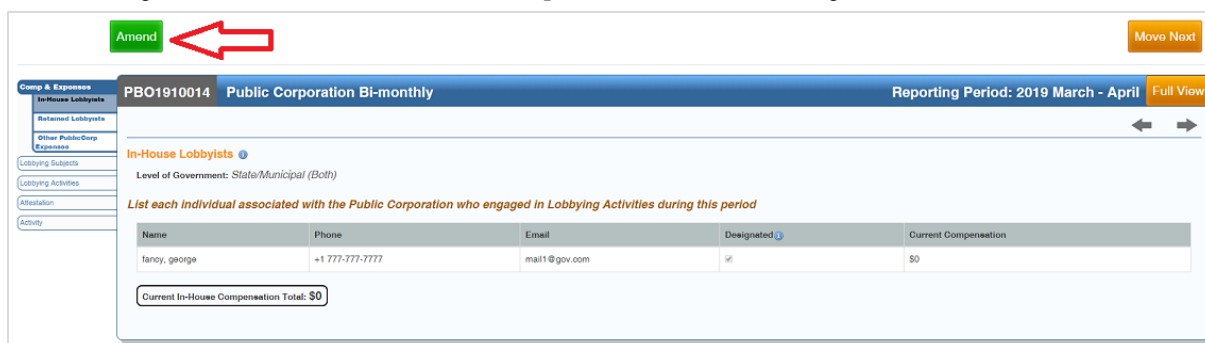
OR

4. Select the Bi-monthly Report from the list of Filings displayed in the *Bi-monthly tab* in the 'All My Filings' window.



ID	Period	Lobbyist	Client	BenClients	Submitted	Status
PBO1910014	2019 - 2020 2019 Mar - Apr	Public Corp 1	Public Corp 1	--NA--	05/21/2019	Submitted
PBO1910013	2019 - 2020 2019 Jan - Feb	Public Corp 1	Public Corp 1	--NA--	05/21/2019	Submitted

5. Select the green 'Amend' button at the top of the screen to begin a new Amendment.



Name	Phone	Email	Designated	Current Compensation
fancy, george	+1 777-777-7777	mail1@gov.com	<input checked="" type="checkbox"/>	\$0

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. In-House Lobbyists

An Amendment to add a *new* In-House Lobbyist requires **two** Effective Dates.

1. In-House Lobbyist Effective Date

The In-House Lobbyist’s “**Effective Date**” is the 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.

In-House Lobbyists

*Last Name *First Name Middle Name Suffix

*Email *Business Phone Ext

*Effective Date

Add Manage Lobbyists Close

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.

Public Corporation Bi-monthly Amendment Reporting Period: 2019 March - April Full View

Attestation

☐ 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.

Filer Name

CAO Name

Date of Submission (MM/DD/YYYY)
05/21/2019

*Effective Date (MM/DD/YYYY)

Continue

Use the guidelines outlined above in ‘*How to File a Public Corporation Bi-monthly Report*’ to change/modify information in an Amended Bi-monthly Report.