
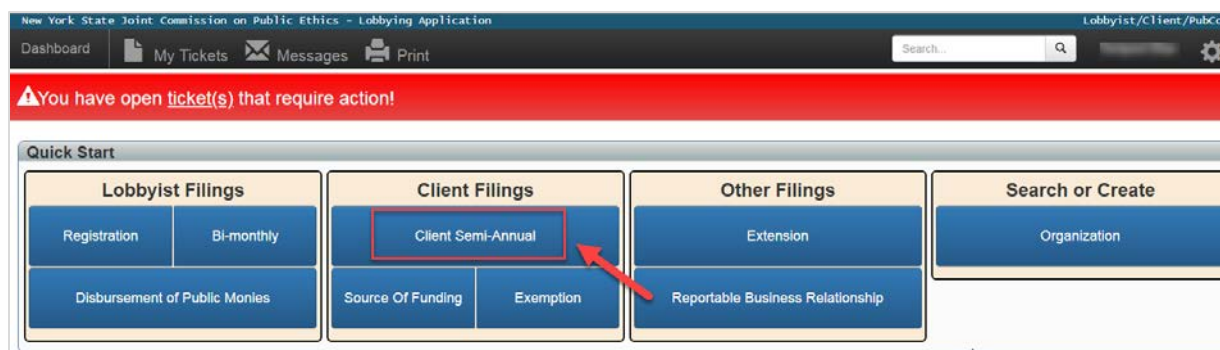


How to File a Client Semi-Annual Report

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

To create a Client Semi-Annual Report (CSA):

1. Select the blue 'Client Semi-Annual' button from the 'Client Filings' quick start menu.



The Client Semi-Annual Report contains the following fields. Items denoted with a red asterisk '*' are required fields

Contractual Client Information*

The 'Contractual Client' must have an existing Profile **BEFORE** a CSA can be submitted in LA.

The 'Contractual Client' may be the *same* as the 'Principal Lobbyist'.

NOTE: If you are a Contractual Client who lobbies on your own behalf (you are both the Principal Lobbyist and Contractual Client), you are not required to file a Client Semi-Annual Report. However, **you are required to disclose Source of Funding (SoF) information.*** (SEE SoF Instructions)

1. On the **Client Semi-Annual** tab, either:
 - enter the first few characters of the Client 'Organization' name in the text search box;
 - OR
 - type the asterisk symbol (*) in the search field to view JCOPE's comprehensive list.

If multiple versions of the Organization name appear in the drop down, select the version that has a green check-mark next to it. The green check-mark indicates the Profile has been verified by an Authorized Person.

How to file: Lobbyist Bi-Monthly Report Online

If a red banner is displayed over the name you would like to select, the Profile information for that Organization name has not been verified. You are required to verify the information before you can select the Organization.

If none of the names have a green check-mark, please contact JCOPE Help Desk.

Review*

Before you proceed, verify the name of the Contractual Client is correct. You **cannot** change the Contractual Client name once you begin the Client Semi-Annual Report. If incorrect, you will be required to discard the form and begin a new Client Semi-Annual Report.

CSA Year/Reporting Period*

1. Click the **'Start'** button next to the applicable filing **'Period'**.

Client Semi-Annual

Contractual Client Info

American Lobbyists
540 Broadway
Albany, NY 12207
United States
p. +1 518-555-5555
e. tempestblue@americanlobbyists.com

Contractual Client Name
American Lobbyists

Year
All

Period

Period	Start/View Form	Submitted Date
2019 January - June	Start	
2018 July - December	Start	

The online CSA in the new LA contains its own main navigation menu and can be viewed in a “tabbed format” or in “full view”, depending on Filer preference.

To navigate the Client Semi-Annual Report, you may do any of the following:

- Click any of the menu items from the left-hand navigation menu;
- Click the left or right arrows at the upper right side of your screen; or
- Click the **Continue** → hyperlink at the bottom of your screen.

Beneficial Client Information*

The **'Beneficial Client'** may be the **same** as the **'Contractual Client'**.

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Certain information disclosed in applicable Filings submitted during the corresponding CSA Reporting Period will automatically populate your CSA:

- The name of any Beneficial Client(s) reported by your Principal Lobbyist(s) on their Statement of Registration(s) where you are listed as the Contractual Client.

You may add **new** Beneficial Client(s) directly to a CSA Report. If you choose to add new Beneficial Client(s) directly to your CSA Report, you may be required to amend associated Filings to add the Beneficial Client(s).

1. On the **Beneficial Client(s) & SoF** tab, either:

- enter the first few characters of the '**Beneficial Client**' name in the text search box;

OR

- 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 that has a green check-mark next to it. The green check-mark indicates the Profile has been verified by an Authorized Person. If none of the names have a green check-mark, please contact [JCOPE Help Desk](#).

The screenshot shows the 'Client Semi Annual Form' with the 'Beneficial Client(s) & SoF' tab active. At the top, there are sections for 'Contractual Client' (ABC Lobbying Organization, LLC) and 'Beneficial Clients' (ABC Lobbying Organization, LLC). Below these are 'Submit', 'Discard', and 'Save' buttons. The main form area has a 'Beneficial Client Search' bar with the text 'Test' entered. A dropdown menu shows search results: 'TEST ONE' and 'Test Organization' (highlighted with a red box). To the right of the dropdown is a 'SOF' section with a 'Start SOF' button. The left sidebar contains navigation links: 'Principal Lobbyist(s) Information', 'Lobbying Expenses', 'Lobbying Subjects', 'Lobbying Activities', 'Business Relationships', and 'Attestation'. The 'Continue' button is at the bottom left.

If a Profile does not yet exist for the 'Beneficial Client':

1. On the **Beneficial Client(s) & SoF** tab:

- Select the '**Click here to create Beneficial Client Profile that does not exist yet**' hyperlink, and provide the following information:

Type of Lobbying Organization

Lobbyist/Client Organization, Public Corporation, or Coalitions

Beneficial Client Name

The Organization Name (including Coalitions and Public Corporations)

How to file: Lobbyist Bi-Monthly Report Online

Beneficial Client Business Address, Phone Number, Email Address

The address, phone number, and email address of the Beneficial Client's place of business.

Beneficial Client Responsible Party (Chief Administrative Officer)

You will be required to also provide the name of the person who is responsible for making and filing Statements and Reports required under the Lobbying Act for the Beneficial Client, as well as their business title, address, phone number, and email address.

★ **Repeat these steps for each Beneficial Client required to be listed on your CSA.**

2. Select the 'Create' button to save your changes. **NOTE:** All fields denoted with a red asterisk (*) are required fields.

The screenshot shows a 'Create Profile' window with a blue header and a close button (X) in the top right. The form is divided into two main sections. The first section, 'Lobbyist/Client Organization', is highlighted with a red box and contains radio buttons for 'Lobbyist/Client Organization' (selected), 'Public Corp', and 'Coalition'. Below this are fields for '*Name', '*Business Street Address', 'Street 2 (apartment, suite, floor, etc.)', '*City', 'State' (a dropdown menu showing 'New York'), '*Zip', 'Country' (a dropdown menu showing 'United States'), '*Business Phone' (with a '+1' dropdown), 'Ext', and '*Email' (with an information icon). The second section, 'Responsible Party Contact Information', is also highlighted with a red box and contains fields for '*Last Name', '*First Name', 'Middle Name', '*Title', '*Business Phone' (with a '+1' dropdown), and '*Email' (with an information icon). At the bottom right, there are two buttons: a green 'Create' button and a red 'Close' button, both highlighted with red boxes.

To remove a Beneficial Client, select the red and white circle 'X' icon.

You may remove Beneficial Client(s) directly from a CSA Report. However, please note you must list **at least one Beneficial Client on a CSA Report.**

How to file: Lobbyist Bi-Monthly Report Online

The screenshot shows the 'Client Semi Annual Form' for the reporting period of 2019 July - December. The form is titled 'Beneficial Client(s) & SoF'. On the left, there are tabs for 'Contractual Client' and 'Beneficial Clients'. The 'Contractual Client' tab is active, showing 'ABC Lobbying Organization, LLC' with contact information. The 'Beneficial Clients' tab is also visible. The 'Client Semi Annual' section shows 'Biennial Period: 2019 - 2020', 'Reporting Period: 2019 July - December', and 'Ref #: 12343 (Saved)'. Below this, there are buttons for 'Submit', 'Discard', and 'Save'. The 'Beneficial Client Search' section has a search bar and a list of beneficial clients. A red arrow points to the 'Start SoF' button next to the client 'ABC Lobbying Organization, LLC'.

List of Beneficial Clients affiliated to Contractual Client	SoF
ABC Lobbying Organization, LLC 540 Broadway Albany, NY 12207 United States p: +1 518-408-3976 e: abclobbying@gmail.com	Start SoF

Source of Funding Information (if applicable)

Every Beneficial Client is required to either: (1) Disclose Source(s) of Funding ('SoF'); or (2) Indicate SoF reporting is not required. The information will be appended to every active CSA and Amended CSA of the affiliated Contractual Client(s) during the specified Reporting Period.

If you are acting as **both** the Contractual Client **and** Beneficial Client, you will be required to fill-out your SoF form at this time by selecting the green '**Start SoF**' button next to your name. Any information already filled-out in your CSA will be saved. When you have completed your SoF form, you will be returned to your CSA to complete the remainder of information.

- Data disclosed on your Organization Profile will populate information on your SoF Form.

SEE SoF Instructions for more information

This screenshot is similar to the one above, but the 'Start SoF' button next to the client 'ABC Lobbying Organization, LLC' is circled in red, indicating that the user should click this button to start the SoF form.

List of Beneficial Clients affiliated to Contractual Client	SoF
ABC Lobbying Organization, LLC 540 Broadway Albany, NY 12207 United States p: +1 518-408-3976 e: abclobbying@gmail.com	Start SoF

Principal Lobbyist Information*

Certain information disclosed in applicable Filings submitted during the corresponding CSA Reporting Period will automatically populate your CSA:

How to file: Lobbyist Bi-Monthly Report Online

- The name(s) of each Principal Lobbyist who has listed you as a Contractual Client on a Statement of Registration.
- The names of all Beneficial Client(s) reported by your Principal Lobbyist(s) on their Registration(s).
- The Level of Government and Compensation Amount(s) paid to your *Employed Lobbyist(s)* reported in your Bi-monthly Reports.

NOTE: There are no Reimbursed Expenses for *Employed Lobbyist(s)*.

You may add **new** Principal Lobbyist(s) directly to a CSA Report.

1. On the **Principal Lobbyist(s) Information** tab, either:

- enter the first few characters of the '**Principal Lobbyist**' name in the text search box;
- OR**
- 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 that has a green check-mark next to it. The green check-mark indicates the Profile has been verified by an Authorized Person. If none of the names have a green check-mark, please contact [JCOPE Help Desk](#).



If a Profile does not yet exist for the 'Principal Lobbyist':

- On the **Principal Lobbyist(s) Information** tab:
 - Select the '**Click here to create Principal Lobbyist Profile that does not exist yet**' hyperlink, and provide the following information:

Type of Lobbying Organization

Lobbyist/Client Organization, Public Corporation, or Coalitions.

Principal Lobbyist Name

The Organization Name (including Coalitions and Public Corporations).

Principal Lobbyist Business Address, Phone Number, Email Address

How to file: Lobbyist Bi-Monthly Report Online

The address, phone number, and email address of the [Principal Lobbyist's](#) place of business.

[Principal Lobbyist Responsible Party \(Chief Administrative Officer\)](#)

You will be required to also provide the name of the person who is responsible for making and filing Statements and Reports required under the Lobbying Act for the [Principal Lobbyist](#), as well as their business title, address, phone number, and email address.

- Select the 'Create' button to save your changes. **NOTE:** All fields denoted with a red asterisk (*) are required fields.

Create Profile

☒ Lobbyist/Client Organization ☐ Public Corp ☐ Coalition

*Name

*Business Street Address Street 2 (apartment, suite, floor, etc.)

*City State *Zip Country

*Business Phone Ext

*Email

Responsible Party Contact Information

*Last Name *First Name Middle Name

*Title *Business Phone *Email

Create Close

1. **Each** *Principal Lobbyist(s)* added requires you provide the required information:

[Lobbying Relationship with the Contractual Client](#)

You must indicate the 'Type of Relationship' between you and your Principal Lobbyist by selecting 'Employed' or 'Retained' from the drop-down menu.

[List of Beneficial Clients on Lobbyist's Registration](#)

You must provide the name(s) of the 'Beneficial Clients' listed on the Statement of Registration between you and your Principal Lobbyist by clicking on the 'Edit/Add Beneficial Client' hyperlink.

How to file: Lobbyist Bi-Monthly Report Online

Contractual Client
ABC Lobbying Organization, LLC
540 Broadway
Albany, NY 12207
p. +1 518-408-3976
e. abclobbying@gmail.com

Beneficial Clients
ABC Lobbying Organization, LLC

Client Semi Annual
Biennial Period: 2019 - 2020
Reporting Period: 2019 July - December
Ref #: 12343
(Saved, NOT SUBMITTED) - Looked by You

Submit Discard Save Save: 3:43PM

Client Semi Annual Form Reporting Period: 2019 July - December Full View

Principal Lobbyist(s) Information

Principal Lobbyist Search: Enter Lobbyist Name or Type * To View List

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

Lobbyist(s)	Lobbyist Relationship with Contractual Client	List of Beneficial Clients on Lobbyist's Registration	Level of Govt, Comp, Reimb Exp
ABC Lobbying Organization, LLC 540 Broadway Albany, NY 12207 United States p. +1 518-408-3976 e. abclobbying@gmail.com	Employed	ABC Lobbying Organization, LLC	Edit Level of Gov: State/Municipal (Both) Compensation: \$20,000
ADVANCE TESTING COMPANY INC 3348 ROUTE 208 CAMPELL HALL, 10916 United States p. +1 845-495-1000 e.	-- Choose Type --	Edit/Add Beneficial Clients	Edit Level of Gov: Info Required Compensation: Info Required Reimbursement: Info Required

Grand Total dollar amount of ALL Lobbyist(s) Compensation for Semi-Annual Reporting Period
\$20,000

Continue ➡

2. Select the blue **"Edit"** button to provide additional required information:

Level of Government, Compensation, and Reimbursed Expense Amounts

See information below.

Principal Lobbyist Start Date

You must provide the earliest date the Principal Lobbyist was authorized to engage in Lobbying Activities on your behalf.

Edit Principal Lobbyist Information

*Level of Government Lobbied by your Principal Lobbyist
-- Choose Type --

Compensation Amount paid to Principal Lobbyist for the current CSA Reporting Period
0

Reimbursed Expense(s) paid to Principal Lobbyist for the current CSA Reporting Period
0

Date Principal Lobbyist began Lobbying Activities on your behalf (MM/DD/YYYY)

Save Close

How to file: Lobbyist Bi-Monthly Report Online

- ★ Repeat these steps for each Principal Lobbyist required to be listed on your CSA.

Level of Government, Compensation and Reimbursed Expense Amounts for each Retained Principal Lobbyist*

NOTES:

- The Level of Government and Compensation Amount(s) paid to your *Employed Lobbyist(s)* will automatically populate from the information disclosed in your Bi-monthly Reports.
- There are no Reimbursed Expenses for *Employed Lobbyist(s)*.

The screenshot displays the 'Client Semi Annual Form' for the reporting period of 2019 July - December. It includes sections for Contractual Client (ABC Lobbying Organization, LLC), Beneficial Clients (ABC Lobbying Organization, LLC), and Client Semi Annual information (Biennial Period: 2019 - 2020, Reporting Period: 2019 July - December, Ref #: 12343). The form is locked by the user. The 'Principal Lobbyist(s) Information' section shows a table with one entry for ABC Lobbying Organization, LLC, which is employed. The table includes columns for Lobbyist(s), Lobbyist Relationship with Contractual Client, List of Beneficial Clients on Lobbyist's Registration, and Level of Govt, Comp, Reimb Exp. The compensation amount is listed as \$20,000. A red box highlights the 'Edit' button and the compensation field.

Lobbyist(s)	Lobbyist Relationship with Contractual Client	List of Beneficial Clients on Lobbyist's Registration	Level of Govt, Comp, Reimb Exp
ABC Lobbying Organization, LLC 540 Broadway Albany, NY 12207 United States p: +1 518-408-3976 e: abclobbying@gmail.com	Employed	ABC Lobbying Organization, LLC	<div>Level of Gov: State/Municipal (Both)</div> <div>Compensation: \$20,000</div>

1. Select the blue 'Edit' button for each Retained Lobbyist listed and provide the required information:

Step 1 – Select the 'Level of Government Lobbied' from the drop - down menu.

You must indicate the 'Level of Government' your Principal Lobbyist Lobbied during this reporting period.

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

Step 2 – Add 'Compensation Amount paid to your Principal Lobbyist'.

You must provide the Total (Dollar Amount) of Compensation paid to your Principal Lobbyist during this reporting period.

Step 3 – Add 'Reimbursed Expense Amount paid to your Principal Lobbyist'.

You must provide the Total (Dollar Amount) of Expenses reimbursed to your Principal Lobbyist during this reporting period.

How to file: Lobbyist Bi-Monthly Report Online

Lobbying Expenses*

Disclose Reportable Expense information in the **'Report in the aggregate all expenses less than or equal to \$75'** field.

- If you have none to disclose for this reporting period, you may leave the **'0'** and proceed to the next required field.

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

- the Reimbursed Expense Totals for your Principal Lobbyist(s) must be \$0, and
- no other Expenses can be listed on CSA Report.

Disclose salaries of non-lobbying employees' in the **'Report in the aggregate all expenses for salaries of non-lobbying employees'** field.

- If you have none to disclose for this reporting period, you may leave the **'0'** and proceed to the next required field.

Itemized Expenses

- Select the check-box if you have no **'Itemized Expenses to Report'**.
- Select the green **'Add'** button if you have **'Itemized Expenses, each valued at more than \$75'** to disclose.

The screenshot shows the 'Client Semi Annual Form' for 'Lobbying Expenses' for the reporting period of 2019 July - December. The form is titled 'Client Semi Annual Form' and includes a 'Full View' button. The 'Lobbying Expenses' section is highlighted in the left sidebar. The main form area contains the following fields and buttons:

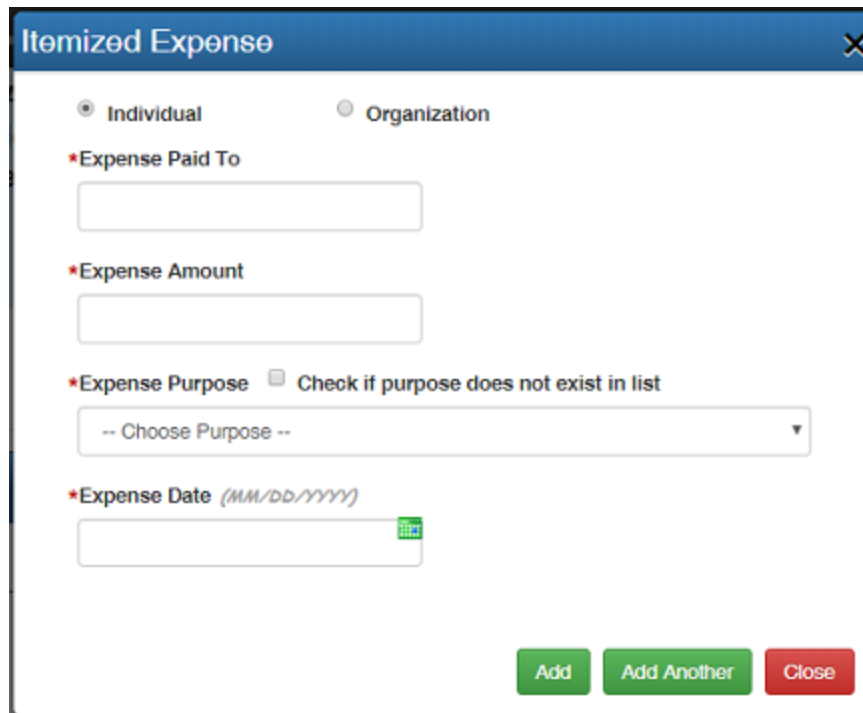
- Contractual Client:** ABC Lobbying Organization, LLC, 540 Broadway, Albany, NY 12207, p.x=1 518-408-9976, e.abclobbying@gmail.com.
- Beneficial Clients:** ABC Lobbying Organization, LLC.
- Client Semi Annual:** Biennial Period: 2019 - 2020, Reporting Period: 2019 July - December, Ref #: 12343, (Saved, NOT SUBMITTED) - Locked by You.
- Buttons:** Submit, Discard, Save, Send: 5:42PM.
- Lobbying Expenses (Current Period Only):**
 - Report in the aggregate all expenses less than or equal to \$75: 0 (with a red arrow pointing to the input field).
 - Report in the aggregate all expenses for salaries of non-lobbying employees: 0 (with a red arrow pointing to the input field).
- Report all itemized expenses:**
 - Check here if you have no itemized expenses to report for this period: ☒ (with a red circle around the checkbox).
 - Table:**

Paid To	Amount	Date	Purpose	Add
				<input type="button" value="Add"/>
- Total Expenses (total of all expense categories):** 50.
- Coalition Member Contribution, if applicable:**
 - *does not apply to a Coalition who opts to file as a Lobbyist or Client.
 - Table:**

Name	Amount	Add
		<input type="button" value="Add"/>
- Continue** button.

'Itemized Expenses, each valued at more than \$75' requires the following information be provided:

How to file: Lobbyist Bi-Monthly Report Online



1. Indicate whether the Expense was paid to an **'Individual'** or an **'Organization'**
2. Provide the **Name of Organization or Individual** the Expense was paid
3. Provide the **Total (Dollar amount) of the Itemized Expense**
4. Provide the **Date of the Expense** (any date within the CSA reporting period). Enter by either:
 - a. using the green calendar icon, or
 - b. enter the dates manually using the mm/dd/yyyy format
5. Provide the **Expense Purpose**
 - Advertising - Billboards
 - Advertising - Flyers
 - Advertising - Print Media
 - Advertising - Television/Radio
 - Buses for lobby event
 - Cell Phone
 - Computer/Internet
 - Consulting
 - E-advocacy
 - Legislative Bill Tracking
 - Legislative Research
 - Lodging
 - Meals for lobby event
 - Photocopies
 - Rallies
 - Rent
 - Social Event/Reception/Banquet
 - Social Media – Websites
 - Travel Reimbursement - Train, Airfare, Car, Hotel
 - Other

You can select the **'Check if purpose does not exist in list'** check-box and type an expense purpose in the text field if a specific Expense purpose is not an available option in the pre-populated list.

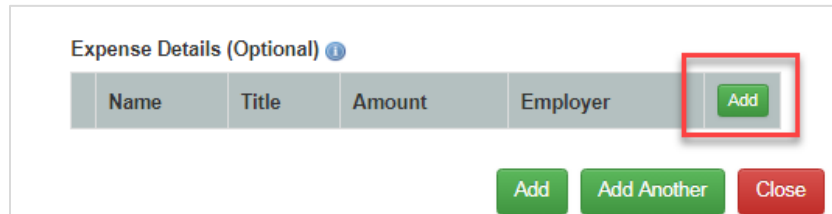
6. Select **'Add'** to add the **'Itemized Expense'** to the Lobbying Expense section of your CSA
7. Select **'Add Another'** to add another **'Itemized Expense'**
8. Repeat until all **'Itemized Expenses'** have been added
9. Select **'Close'** to return to the **Lobbying Expenses** tab

Special Instructions for Itemized Expenses paid to an Organization

If applicable, **'Itemized Expenses'** that have been **paid to an Organization** on behalf of an Individual (or Individuals) must include the Expense Detail(s). Please see the Client Semi-Annual Instructions for a detailed example of the above disclosure.

NOTE: An Expense Detail is only applicable if you selected the **'Organization'** radio button on the **'Itemized Expense'** modal.

1. Select the **'Add'** button in the **'Expense Details'** section of the **'Itemized Expense'** modal



Expense Details (Optional) ⓘ			
Name	Title	Amount	Employer

Add Add Another Close

2. Enter the required information denoted by a red asterisk **'*'**
 - Provide the **Last and First Name of the Individual** the Expense was paid on behalf of
 - a. The **Middle Name** is optional
 - Provide the **Title of the Individual**
 - Provide the portion of the **Dollar Amount** that is attributable for the Individual named
 - Provide the Individual's **Employer Name**

How to file: Client Semi-Annual Report Online

Itemized Expense

☐ Individual ☒ Organization

*Expense Paid To

*Expense Amount

*Expense Purpose ☐ Check if purpose does not exist in list

-- Choose Purpose --

*Expense Date (MM/DD/YYYY)

Expense Detail

*Last Name

*First Name

Middle Name

*Title

*Amount

*Employer

Add Add Another Close

Add Add Another Close

3. Select **'Add'** to add the **'Expense Detail'** to the **'Itemized Expense'**
4. Select **'Add Another'** to add another **'Expense Detail'**
5. Repeat until all **'Expense Details'** have been added
6. Select **'Close'** to return to the **'Itemized Expense'** modal
7. Select **'Close'** again to return to the **Lobbying Expenses** tab

How to file: Client Semi-Annual Report Online

Coalition Member Contributions (if applicable)

1. Select the **'Add'** button
2. Provide the **'Name'** of the Coalition the Contribution was paid to
3. Provide the **Total (Dollar amount of) Contribution paid to Coalition** during this period by the specific Coalition Member (Beneficial Client)

Coalition Member Contribution, if applicable ⓘ

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

Name	Amount	
<input type="text" value="Coalition in support of Coalitions"/>	<input type="text" value="500"/>	<div><div>Add</div><div>✖</div></div>

Lobbying Subjects for CSA Reporting Period*

At least one 'Lobbying Subject' is required to be disclosed on each CSA 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 of your CSA Report:
 - a. enter the first few characters of the **'Subject'** in the text search box

OR

 - b. type the asterisk symbol (*) in the search field to view JCOPE's comprehensive list

Client Semi Annual Form

Lobbying Subjects ⓘ

Subjects Lobbied

*Search Type * for full list of subjects

Selected Subjects

Subjects	
Budget/Appropriations	<div>✖</div>
Construction – general	<div>✖</div>
Education – Charter Schools	<div>✖</div>

[Continue](#) ➔

How to file: Client Semi-Annual Report Online

2. Click-on the **'Subject'** to select it.

- You may add multiple **'Subjects'**.
- A **'Lobbying Subject'** that has been successfully added to a Filing is displayed in the **'Selected Subjects'** area below the 'search field'.

To remove a Lobbying Subject, select the red and white circle 'X' icon.

Lobbying Activities for CSA 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.

NOTES:

- The LA will automatically populate the Lobbying Activity information reported by Employed Lobbyists on their Bi-monthly Reports. You CANNOT remove/edit these Lobbying Activities. You must submit an Amended Bi-monthly Report to change any Lobbying Activity information auto-populated from your Bi-monthly Report(s).
- If you determine Lobbying Activity information needs to be amended, **DISCARD** your CSA and submit your Bi-monthly Report Amendment(s). DO NOT SAVE YOUR CSA since the changes made to your Bi-monthly Report(s) will not refresh the information populated to your CSA at this time. Once you have submitted your Bi-monthly Amendments, start your CSA Report again.

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 **'Type'**, **'Communication'**, **'Focus'**, and **'Parties Lobbied'**.
- You can add or remove **'Lobbying Activities'** directly to a CSA Report.

There are two options available to add Lobbying Activities to your CSA; and both options can be used.

- a. Populate the Lobbying Activity information from the data disclosed by your Retained Lobbyist(s) on their Bi-monthly Reports (and applicable amendments).

and

How to file: Client Semi-Annual Report Online

- b. Add Lobbying Activity by data-entering all required information.

The screenshot shows the 'Client Semi Annual Form' with a sidebar on the left containing links: Beneficial Client(s) & SoF, Principal Lobbyist(s) Information, Lobbying Expenses, Lobbying Subjects, Lobbying Activities (highlighted), Business Relationships, and Attestation. The main content area is titled 'Lobbying Activities' and includes a dropdown menu 'Do You have Lobbying Activities to Report?' set to 'Yes'. Below this is the section 'State & Municipal Focuses and Parties Lobbied' with two sub-tabs: 'My Own Focuses' and 'Focuses Reported by Lobbyists' (highlighted with a red box).

To add “Lobbying Focuses” reported by your Retained Lobbyist(s) on their Bi-monthly Reports (as of the submission date of the CSA):

Step 1 – Confirm the ‘Focuses Reported by Lobbyists’ sub-tab is highlighted

This screenshot shows the 'Focuses Reported by Lobbyists' sub-tab selected. A red circle highlights the sub-tab. Two red arrows point to the check-boxes next to the names of 'Test Lobbyist A' and 'Test Lobbyist B' in the 'Lobbyist' column. The table also includes columns for 'List of Beneficial Clients on Lobbyist's Registration' and 'Focuses'.

Lobbyist	List of Beneficial Clients on Lobbyist's Registration	Focuses						
<input checked="" type="checkbox"/> Test Lobbyist A Test Boulevard Albany, NY 12222 United States p.+1 518-555-5555 e.test@test.com	Beneficial Client 1	<table border="1"><thead><tr><th>Focus</th><th>Parties</th><th>Communications</th></tr></thead><tbody><tr><td>stuffs</td><td>Chautauque Utility District</td><td>Direct Lobbying</td></tr></tbody></table>	Focus	Parties	Communications	stuffs	Chautauque Utility District	Direct Lobbying
Focus	Parties	Communications						
stuffs	Chautauque Utility District	Direct Lobbying						
<input checked="" type="checkbox"/> Test Lobbyist B Testing Street Albany, NY 12222 United States p.+ 518-555-4444 e. testing@testing.com	Beneficial Client 2	<table border="1"><thead><tr><th>Focus</th><th>Parties</th><th>Communication</th></tr></thead><tbody><tr><td>485</td><td>Mount Hope</td><td>Both</td></tr></tbody></table>	Focus	Parties	Communication	485	Mount Hope	Both
Focus	Parties	Communication						
485	Mount Hope	Both						

Step 2 – Select the check-box next to the Retained Lobbyist name. (You can select all check-boxes.)

Step 3 – The Lobbying Activity information will populate to the ‘My Selected Focuses’ section of your CSA Report.

A specific Lobbying Activity populated to your CSA can be removed **after** it has been added by clicking the red and white circle ‘X’ icon. (**NOTE:** Removal of a Lobbying Activity on your CSA does not affect the information reported by your Principal Lobbyists on their Bi-monthly Report(s).)

NOTE: You are not required to use the Lobbying Activities reported by your Principal Lobbyist(s). However, JCOPE recommends you utilize this feature since the CSA requires disclosure of the **actual** Lobbying Activities performed by your Principal Lobbyist(s) during the specific Reporting Period.

How to file: Client Semi-Annual Report Online

To add a “Lobbying Focus” by data-entering the required information:

Step 1 – Confirm the ‘My Own Focuses’ sub-tab is highlighted

The screenshot shows the 'Client Semi Annual Form' interface. The left sidebar has a menu with 'My Own Focuses' highlighted. The main content area is titled 'Lobbying Activities' and includes a 'Do You have Lobbying Activities to Report?' dropdown set to 'Yes'. Below this, there's a section for 'State & Municipal Focuses and Parties Lobbied'. The 'My Own Focuses' sub-tab is selected, showing a large empty box for 'Foci' and a smaller 'Parties Lobbied' box. Both boxes have a green 'Update' button at the bottom right, which are circled in red. A 'Preview' section is also visible between the two main boxes. The bottom of the page shows a search bar and a 'Monitoring Only' button.

Step 2 – Select the green ‘Update’ button

Step 3 – Select a ‘Focus Type’

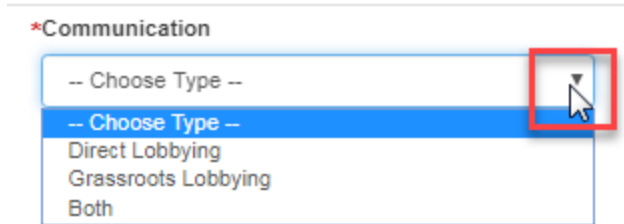
A *Focus Type* (State or Municipal Level) must be identified for each Focus number (such as the bill or procurement number), or brief description of the Focus area if the identifying number is unknown.

- State Bill
- State Executive Order
- State Law
- State Procurement
- State Resolution
- State Regulation/Rate-making/Rule
- State Tribal Compact Agreement - NYS Indian Nations
- Municipal Bill
- Municipal Executive Order
- Municipal Law
- Municipal Procurement
- Municipal Resolution
- Municipal Regulation/Rate-making-Rule

Step 4 – Select a ‘Type of Communication’

A *Type of Communication* (Direct, Grassroots Lobbying or Both)* must be assigned from the drop-down menu for each Focus number (such as the bill or procurement number), or brief description of the Focus area if the identifying number is unknown.

How to file: Client Semi-Annual Report Online



A screenshot of a web form showing a dropdown menu for 'Communication'. The menu is open, displaying options: '-- Choose Type --', 'Direct Lobbying', 'Grassroots Lobbying', and 'Both'. A red box highlights the dropdown arrow icon on the right side of the menu.

a. Monitoring Only

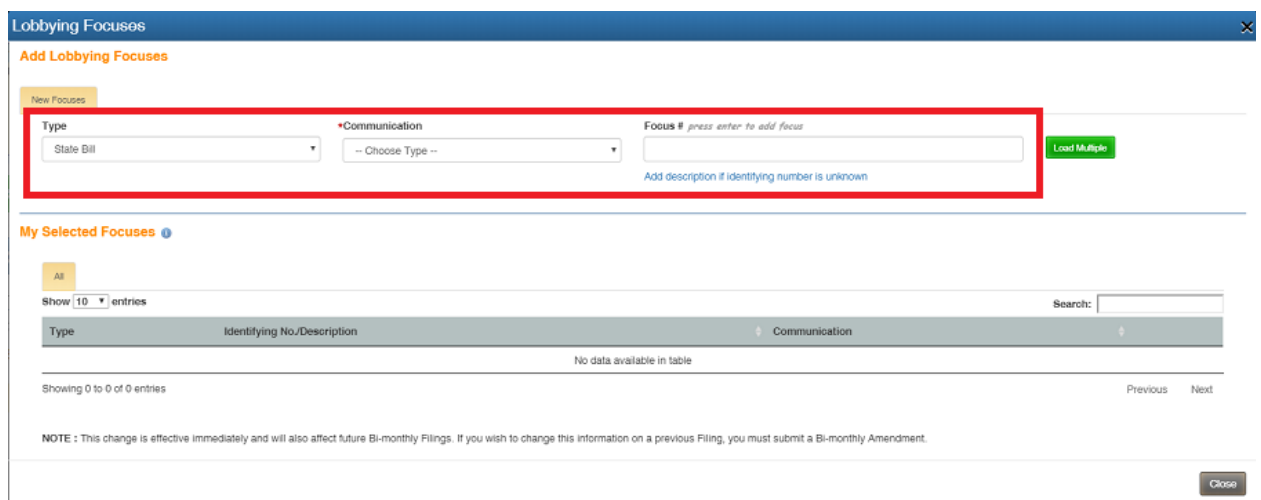
If you have a Focus to report, **but have not actually Lobbied a specific Party**, you may select the **'Monitoring Only'** check-box once the Focus has been added to your **'My Selected Focuses'** section.

1. Select the Focus to add it to the **'Preview'** box. *Do not select a Parties Lobbied.*
2. Select the **'Add'** button underneath the **'Preview'** box.
3. Select the **'Monitoring Only'** check-box next to the Focus in the **'My Selected Focuses'** section.

Step 5 – Identify Focus(es)

a. Focus Number (identifying number)

- Add a **'Focus #'** and click the 'Enter' key on your keyboard to save your changes.
- If a Focus Number (identifying number) is **unknown**, you can provide a description of the Focus by selecting the **'Add description if identifying number is unknown'** hyperlink.



A screenshot of the 'Lobbying Focuses' form. The form is divided into two main sections: 'Add Lobbying Focuses' and 'My Selected Focuses'.

Add Lobbying Focuses: This section contains a 'New Focuses' tab. Below the tab, there are three input fields: 'Type' (with a dropdown menu showing 'State Bill'), '*Communication' (with a dropdown menu showing '-- Choose Type --'), and 'Focus # press enter to add focus'. A red box highlights these three input fields. To the right of the 'Focus #' field is a green 'Load Multiple' button. Below the input fields is a blue hyperlink that reads 'Add description if identifying number is unknown'.

My Selected Focuses: This section contains a table of selected focuses. The table has columns for 'Type', 'Identifying No./Description', and 'Communication'. The table is currently empty, with the text 'No data available in table' displayed. Below the table, there is a search bar and a 'Close' button.

At the bottom of the form, there is a note: '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.'

SPECIAL FORMATTING REQUIREMENTS FOR STATE BILLS.

Identifying Senate and Assembly Bills: Enter 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; or a 1234; or A 1234; or A_1234

Identifying Amended Senate and Assembly 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; or a 1234a; or A 1234a; or A_1234A

Refer to the 'How to Properly Disclose Lobbying Activities' document for information on how to properly include sufficient specificity for all other Focus Types. Failure to properly disclose Lobbying Activities may result in a Ticket on your Filing, and require you to amend the Filing.

b. Description of the Focus

If a Focus Number (identifying number) is **unknown** at the time of submission of your Filing, you can provide a description of the Focus.

- Select '**Add Description if Identifying Number is unknown**' and provide a brief description; then click the 'Enter' key to add.
- **For Municipal Level Focuses**, indicate the originating locality in your description.

EXAMPLE: Municipal Bill on requiring single stream recycling in the Town of Delmar, New York.

c. Load Multiple State and Municipal Bills

You can **upload multiple State and Municipal Bill numbers** as long as they are grouped by the same **Type of Communication**.

1. **Organize your bill numbers** into the following categories:
 - Direct Lobbying
 - Grassroots Lobbying
 - Both

How to file: Client Semi-Annual Report Online

2. Use commas to separate bill numbers

- Each bill number must be separated by a comma.
- State Senate Bill numbers and Assembly Bill numbers do NOT need to be loaded separately.

Correct: A1234,S1234,A4567,A8790,S2345

3. Select the green 'Load Multiple' button

4. Copy/paste the bill numbers into the corresponding **Lobbying Focuses** text box(es).

The screenshot shows a window titled "Load Multiple Focuses". At the top, it says "Type: State Bill". Below this, there are three text boxes for entering bill numbers, each with a placeholder text "Enter a list of Focuses separated by comma". The first box is labeled "Direct Lobbying Focuses" and contains "A1234, S1234". The second box is labeled "Grassroots Lobbying Focuses" and contains "S4567, S88000". The third box is labeled "Both(Direct/Grassroots) Lobbying Focuses" and contains "A65488, S38485". At the bottom right, there are two buttons: a green "Process" button and a grey "Back" button. The "Process" button is highlighted with a red rectangle.

5. Select the 'Process' button

Focuses that have been successfully added will appear in the '**Added Focuses**' section.

- If you accidentally entered a Bill number twice, it will appear in the '**Duplicate Communication Types**' section.
- Any bill number that does not meet the formatting requirements will appear in the '**Invalid Focuses**' section.
 - You can edit these bill numbers on this screen.

How to file: Client Semi-Annual Report Online

- Correct the bill number and click **'Process'** when completed.

Load Multiple Focuses

Type: State Bill

Added Focuses
S4567, A9000-A, 56097, A70444, A1234

Duplicate Communication Types
A1235

Invalid Focuses
M56787

Direct Lobbying Focuses: Enter a list of Focuses separated by commas

Grassroots Lobbying Focuses: Enter a list of Focuses separated by commas

Both(Direct/Grassroots) Lobbying Focuses: Enter a list of Focuses separated by commas
M56787

Process Back

6. Once all corrections are complete:

The Communication Type/Focus pairing will populate to the **'Added Focuses'** section of the main **'Lobbying Focuses'** screen of your CSA Report.

- An incorrectly identified **Communication Type** can be easily corrected by selecting a new **'Communication'** from the drop-down menu.
- To remove a State Bill or any other Focus Type, click the red and white circle 'X' icon.

Lobbying Focuses

Add Lobbying Focuses

New Focuses Focuses From Registration

Type: State Bill *Communication: - Choose Type - Focus #: press enter to add focus

Add description if identifying number is unknown

My Selected Focuses

Type	Identifying No./Description	Communication
State Bill	S4567	Direct

Step 6 – Identify 'Parties Lobbied'

The direct connection (one-to-one relationship) between the Focus and the target(s) (referred to as **'Parties Lobbied'**) of any reportable **"Lobbying Activity"** must be identified.

NOTE: A Focus does **NOT** require a **'Party'** be connected to it **IF a specific Party** was not **actually Lobbied**. You may select the **'Monitoring Only'** check box once the Focus has been added to your **'My Selected Focuses'** section.

- a. To add a 'Party Name'

How to file: Client Semi-Annual Report Online

1. Select the green **'Update'** button
2. On the **"Lobbying Parties"** tab, either:
 - enter the first few characters of the **'Party Name'** name in the text search box;
 - or
 - type the asterisk symbol (*) in the search field to view JCOPE's comprehensive list.

NOTES:

- The **'Government Body'** information will populate for you if a Party Name is selected from JCOPE's list.
- **IF** you sent a communication to either or both Houses of the Legislature regarding a specific Focus, the following options are available on a Bi-monthly Report in the **'Party'** field (so you do not have to select every Senator/Assembly person):
 - A communication sent to entire Senate
 - A communication sent to entire Assembly
 - A communication sent to entire Legislature
- **IF** a specific title and/or name of a Public Official, Public Official's office, or unit/department within an agency is not found in JCOPE's list:
 - elect the **'Click here to add Party Name if not found'** hyperlink

Lobbying Parties

Add Party Lobbied ⓘ

Party Type * for full list of parties

[Click here to add Party Name if not found](#)

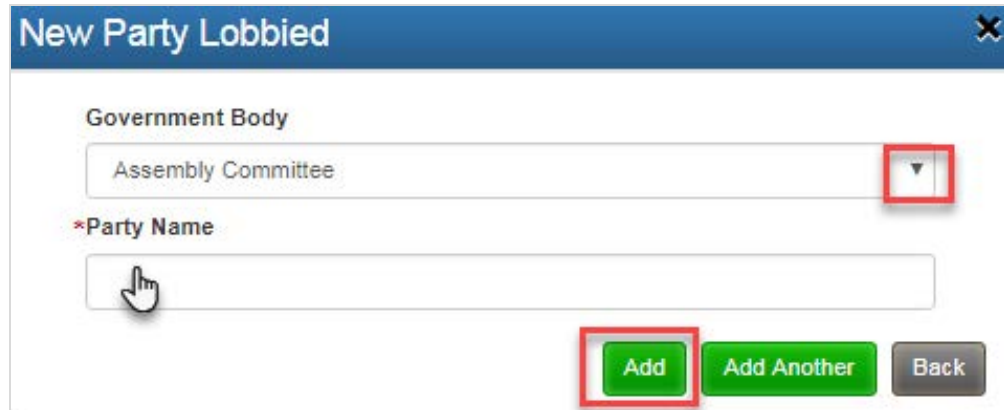
Parties Lobbied ⓘ

Government Body	Name
County Special District	BAGS/SOLID WASTE MANAGEMENT DISTRICT (REFUSE)
City	CityOne!

Add Close

- select the **'Government Body'** from the drop-down menu
- provide the **'Party Name'** in the text box
- select **'Add'** to add one **'Party Name'** (see **EXAMPLES below**)
- select **'Add Another'** to select another **'Government Body'** and add another **'Party Name'**
- repeat until all **'Parties'** have been added
- click **'Back'** to return to the main **'Lobbying Parties'** pop-up window

How to file: Client Semi-Annual Report Online



Example A: If you met with a staff member of a State Senator, or staff member of a legislative committee, you would:

1. Select the 'Click here to add Party Name if not found' hyperlink
2. Select 'Senate' from the 'Government Body' drop-down menu
3. Enter 'Senator Smith, staff member' or 'Senate Rules Committee, staff member' (as applicable) in the 'Party Name' field; **OR**
4. Enter 'Senator Smith, staff member (Jane Doe)' or 'Senate Rules Committee, staff member (Jane Doe)' (as applicable) in the 'Party Name' field

Example B: If you met with the Commissioner of Taxation and Finance, you would:

1. Select the 'Click here to add Party Name if not found' hyperlink
2. Select 'State Agency' from the 'Government Body' drop-down menu
3. Enter 'Taxation and Finance, Commissioner' in the 'Party Name' field; **OR**
4. Enter 'Taxation and Finance, Commissioner Jane Doe' in the 'Party Name' field

Example C: If you met with a staff member of the Office of Real Property Tax Services, you would:

1. Select the 'Click here to add Party Name if not found' hyperlink
2. Select 'State Agency' from the 'Government Body' drop-down menu
3. Enter 'Office of Real Property Tax Services, XXX' (unit or department within the agency the staff member represents) in the 'Party Name' field; **OR**
4. Enter 'Office of Real Property Tax Services, XXX (unit or department within the agency the staff member represents), staff person (Jane Doe) in the 'Party Name' field

Example D: If you met with a staff member of a local Mayor's office, you would:

1. Select the 'Click here to add Party Name if not found' hyperlink
2. Select 'City' from the 'Government Body' drop-down menu
3. Enter 'Mayor of (Insert City Name), staff person' (or unit or department within the City the staff member represents) in the 'Party Name' field; **OR**

How to file: Client Semi-Annual Report Online

4. Enter **'Mayor of (Insert City Name), staff person (Jane Doe)'** (or unit or department within the City the staff member represents) in the **'Party Name'** field

b. To remove a 'Party'

1. On the **Lobbying Parties** tab, select the red and white circle **'X'** icon.



The screenshot shows a web application window titled "Lobbying Parties". It has a blue header bar with a close button (X). Below the header, there is a section "Add Party Lobbied" with a search box and a link "Click here to add Party Name if not found". Below that is a section "Parties Lobbied" containing a table with two columns: "Government Body" and "Name". The table has three rows: "NYS Legislature" with "A communication sent to entire Legislature", "NYS Senate" with "John J. Bonaio", and "State Agency" with "Office of the Governor". To the right of each row is a red and white circle icon with an 'X' inside, indicating a removal option. At the bottom right of the window are "Add" and "Close" buttons.

Government Body	Name	
NYS Legislature	A communication sent to entire Legislature	
NYS Senate	John J. Bonaio	
State Agency	Office of the Governor	

Step 7 –Assign/identify the direct connection (one-to-one relationship) between the **'Focuses'** and the target(s) of the Lobbying Activity (**'Parties Lobbied'**)

All of your **'Focuses'** and **'Parties Lobbied'** information will display on your screen (see below), and you can now begin to 'connect' the Focus(es) to the Party(ies).

1. Choose a **'Focus'** by selecting the check-box next to the Focus Identifier (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).
 - You may select more than one Party Name *per Focus* by selecting multiple check-boxes.
3. Each *checked* **'Focus'** and **'Party(ies) Lobbied'** populates to the **'Preview'** box for your review.

How to file: Client Semi-Annual Report Online

The screenshot shows the 'Client Semi-Annual Report Online' interface. It features three main sections: 'Focuses', 'Parties Lobbied', and a 'Preview' box. The 'Focuses' section on the left lists categories like 'Direct Lobbying (3)' and 'Grassroots (2)' with specific items and checkboxes. The 'Parties Lobbied' section on the right lists entities like 'Columbia County' and 'Deborah J. Glick' with checkboxes. The 'Preview' box in the center shows a table with columns for 'Focuses' and 'Parties'. Below these sections is a 'My Selected Focuses' section with a search bar and a table. The table has columns for 'Type', 'Focus', 'Lobbyist', 'Parties', 'Communication', and 'Monitoring Only'. The table is currently empty, showing 'No data available in table'.

- 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. Select the **'Add'** button underneath the **'Preview'** box to add your selections to your **'My Selected Focuses'** section.
5. Repeat steps until you have added all **'Focuses'** and **'Party(ies) Lobbied'** to your **'My Selected Focuses'** section for CSA reporting period.

NOTE: You **MUST** select the **'Add'** button underneath the **'Preview'** box to actually **add** the selections to your CSA Report.

Focuses that do not appear underneath the **'My Selected Focuses'** section **WILL NOT** appear on your submitted filing and will not be publicly available.

This screenshot shows the 'My Selected Focuses' section of the interface. It includes a search bar and a table with columns: 'Type', 'Focus', 'Lobbyist', 'Parties', 'Communication', and 'Monitoring Only'. The table contains three entries:

Type	Focus	Lobbyist	Parties	Communication	Monitoring Only
Municipal Executive Order	Municipal Tax cap restrictions in the Village of Nassau, NY	Not Specified			<input checked="" type="checkbox"/>
Municipal Resolution	Issues relating to transporting fresh produce via local roads in Columbia County, NY	Not Specified	Columbia County Columbia County Industrial Development Agency Village of Valatie Local Development Corporation	Direct Lobbying	<input checked="" type="checkbox"/>
State Bill	A1234	Not Specified	A communication sent to entire Senate Deborah J. Glick	Direct Lobbying	<input checked="" type="checkbox"/>

At the bottom, it says 'Showing 1 to 3 of 3 entries' and has 'Previous' and 'Next' buttons.

How to file: Client Semi-Annual Report Online

Monitoring Only

If you have Focus to report, **but have not actually Lobbied a specific Party**, you may select the **'Monitoring Only'** check-box once the Focus has been added to your **'My Selected Focuses'** section.

1. Select the Focus to add it to the **'Preview'** box. *Do not select a Parties Lobbied.*
2. Select the **'Add'** button underneath the **'Preview'** box.
3. Select the **'Monitoring Only'** check-box next to the Focus in the **'My Selected Focuses'** section.

Focuses

▼ Direct Lobbying (3)

☐ A1234

☐ Air BnB restrictions in NYC

☐ Issues relating to transporting fresh produce via local roads in ...

▼ Grassroots (2)

☐ Municipal Tax cap restrictions in the Village of Nassau, NY

☐ S5678

Update

Preview

Focuses

Parties

Add

Parties Lobbied

☐ A communication sent to entire Senate

☐ Columbia County

☐ Columbia County Industrial Development Agency

☐ Deborah J. Glick

☐ Village of Valatie Local Development Corporation

Update

My Selected Focuses

All

State Bill

Municipal Executive Order

Municipal Resolution

Show 10 entries

Search:

Type	Focus	Lobbyist	Parties	Communication	Monitoring Only
Municipal Executive Order	Municipal Tax cap restrictions in the Village of Nassau, NY	Not Specified			<input checked="" type="checkbox"/>
Municipal Resolution	Issues relating to transporting fresh produce via local roads in Columbia County, NY	Not Specified	Columbia County Columbia County Industrial Development Agency Village of Valatie Local Development Corporation	Direct Lobbying	<input type="checkbox"/>
State Bill	A1234	Not Specified	A communication sent to entire Senate Deborah J. Glick	Direct Lobbying	<input type="checkbox"/>

Showing 1 to 3 of 3 entries

Previous1Next

How to file: Client Semi-Annual Report Online

Reportable Business Relationship Information*

Previously submitted RBR forms will populate to this Section of your Filing. You can disclose a new RBR by selecting the **'Create New RBR'** button. You can also amend your previously submitted RBR form by selecting the **'pencil'** icon in the Action column, next to the RBR form.

If you have not yet submitted any RBR forms, you must indicate whether a Reportable Business Relationship exists during this Calendar Year by selecting either **'Yes'** or **'No'** from the drop-down menu.

If NO active Reportable Business Relationship(s) currently exists in this Calendar Year

- Select **'No'**, and continue with your Registration

If an active Reportable Business Relationship(s) (which has *not* previously been submitted and populated to this Section) currently exists in this Calendar Year

- Select **'Yes'**
 - You will be required to fill-out your RBR form at this time. Any information already filled-out in your CSA will be saved. When you have completed your RBR form, you will be returned to your CSA to complete the remainder.

★ SEE How to File a Reportable Business Relationship Instructions

Client Semi Annual Form Reporting Period: 2019 January - June Full View

Business Relationships

Do you have a Reportable Business Relationship? Yes

If NOT checked, the Client must either amend the existing RBR - OR - submit a new RBR.

Create New RBR

RBRs

Confirmation #	Period	Entity/State Person	Submission Date	Action
----------------	--------	---------------------	-----------------	--------

Saved RBRs

Reference #	Period	Entity/State Person	Action
11775			(Form)

Continue

Attestation*

1. Check the **'Attestation'** check-box
2. Select the **'Submit'** button.
 - You will be directed to the Payment Portal. Your CSA Report will remain in 'Saved Status' until the payment portion is completed.
 - Once you have completed the payment information, you will be able to:
 - View the Filing
 - Return to the Dashboard

How to file: Client Semi-Annual Report Online

Contractual Client
ABC Lobbying Organization, LLO
540 Broadway
Albany, NY 12207
p: +1 518-408-3976
e: abclobbying@gmail.com

Beneficial Clients
ABC Lobbying Organization, LLO

Client Semi Annual
Biennial Period: 2019 - 2020
Reporting Period: 2019 July - December
Ref #: 12343
(Saved, NOT SUBMITTED) - Locked by You

Submit Discard Save Saved: 7:26AM

Beneficial Clients & SOF
Principal Lobbyist(s) Information
Lobbying Expenses
Lobbying Subjects
Lobbying Activities
Business Relationships
Attestation
Activity

Client Semi Annual Form
Reporting Period: 2019 July - December 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
Doi, Jane

CAD Name
Doi, Jane

Continue ➔

Payment*

When you select the **'Submit'** button, you will be directed to the Payment Portal. Your CSA will remain in **'Saved Status'** until the payment portion is completed.

Payment Processing

Form Reference Number: 9881

Credit Card Check

Payment Details

Check Number
500

AMOUNT
200

Pay Now

The following options are available:

- (a) **Remit payment via Online Lobbying Application** with Visa, MasterCard or American Express. Payment must be made **at the time of submission**. *

NOTE: For security purposes, the new LA will only permit two attempts to pay your filing fee by credit card. After the second failed attempt, you will be required to pay by check or money order.

Payment Processing

Form Reference Number: 9881

Credit Card Check

Payment Details

Check Number
500

AMOUNT
200

Pay Now

- (b) **Check/Money Order.** You may indicate payment will be made by submitting a check or money order. You must provide your check or money order number in the appropriate field of the online form.

Please make all checks payable to the **Joint Commission on Public Ethics (NYS)** and include the Filing Confirmation and Reference numbers in the memo section.

How to file: Client Semi-Annual Report Online

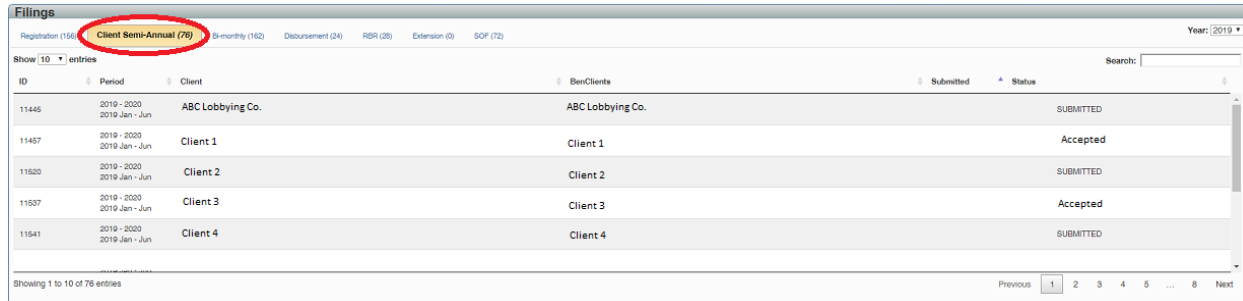
Mail your check to:

New York State Commission on Public Ethics
540 Broadway
Albany, NY 12207.

How to File an Amended Client Semi-Annual Report

To create an Amended CSA Report:

1. Select the CSA Report from the list of Filings displayed in the **Client Semi-Annual** tab in the 'All My Filings' window.



ID	Period	Client	BenClients	Submitted	Status
11446	2019 - 2020 2019 Jan - Jun	ABC Lobbying Co.	ABC Lobbying Co.		SUBMITTED
11457	2019 - 2020 2019 Jan - Jun	Client 1	Client 1		Accepted
11520	2019 - 2020 2019 Jan - Jun	Client 2	Client 2		SUBMITTED
11537	2019 - 2020 2019 Jan - Jun	Client 3	Client 3		Accepted
11541	2019 - 2020 2019 Jan - Jun	Client 4	Client 4		SUBMITTED

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



Contractual Client
ABC Lobbying Organization, LLC
540 Broadway
Albany, NY 12207
p: +1 518-408-3976
e: abclobbying@gmail.com

Beneficial Clients
ABC Lobbying Organization, LLC

Client Semi Annual Amendment
Biennial Period: 2019 - 2020
Reporting Period: 2019 January - June
Ref #: 11450
Confirmation #: CSA1910004
(Accepted) - Locked by You

Amend

CSA1910004 - Client Semi Annual Amendment Form
Reporting Period: 2019 January - June **Full View**

Beneficial Client(s) & SoF

Note: Each Beneficial Client must submit a SoF. Once Submitted, they will automatically be attached to your CSA. For more information, Click Here.

List of Beneficial Clients affiliated to Contractual Client	SoF
ABC Lobbying Organization, LLC 540 Broadway Albany, NY 12207 United States p: +1 518-408-3976 e: abclobbying@gmail.com	SFA1910002

NOTE

Each Amended Client Semi-Annual Report requires the Filer to provide a specific date the change(s) are (or will be) effective; known as an **"Effective Date of Change"** *. Multiple changes can be made on an Amended CSA Report **as long as all the changes being made on the Filing have the same "Effective Date of Change"**. Otherwise, separate Amendments are required for each Effective Date of Change.

EXAMPLE of three changes which would require two SEPARATE AMENDMENTS:

1. *New Retained Lobbyist, Jane Smith Company authorized to lobby for you effective 1/15/2019)*
2. *Change in compensation (effective 2/15/2019)*

Amended CSA Reports can be submitted at any time during the calendar year regardless of whether the original CSA Report or other Amended CSA Reports are pending, as long as the **"Effective Date of Change"** is within the same calendar year as the CSA Report being amended.

How to file: Client Semi-Annual Report Online

***Amended CSA Report Effective Date**

An Amended CSA Report **“Effective Date of Change”** is the date a specific change (or changes) takes effect; **not the date the Amendment is submitted.**

Use the guidelines outlined above in *‘How to File a Client Semi-Annual Report’* to change/modify information in an Amended CSA Report.