How to complete Email Verification and Recertify an Individual User and Organization Profile

Beginning in the 2021 – 2022 Biennial Period, new security enhancements have been implemented to ensure the Lobbying Application ('LA') has the most up-to date information with respect to Email addresses, and information contained in Individual User and Organization Profiles. In addition, every Individual and Organization Profile in LA must be reviewed and recertified by the Profile owner on a yearly basis.

PLEASE NOTE: ALL Individuals (Responsible Party and Authorized Preparers) must already have a **personal NY.gov ID account and** a **verified User Profile** to be able to utilize LA.

Important information for the Responsible Party

LA will **NOT** allow any Organization to submit filings until the Responsible Party has completed these steps. Before any Responsible Party ("RP") listed on an Organization Profile can gain access to LA, they MUST:

1. verify his or her Email address; **and**
2. recertify his or her Individual (User) Profile.

Important information related to Organization Profiles

An Organization will not be able to submit filings until:

1. its RP has verified his or her Email address; **and**
2. its RP has recertified his or her Individual (User) Profile; **and**
3. the Organization's Profile has been recertified by the Organization's RP.

   NOTE: Organization Profiles must be recertified by **either** the Primary RP or Alternate RP listed in the Organization Profile.

The following information will instruct Filers how to:

1. **verify their Email address** for the **Individual User Profile** (RP and Preparer). ***This action must be completed first.***
2. **recertify** their Individual User Profile (Required on a yearly basis).
3. **recertify** an Organization Profile (Required on a yearly basis).

PLEASE NOTE:

- NY.gov Passwords may be reset by using the my.ny.gov forgotten password self-service tool. The Lobbying Helpdesk cannot assist filers with resetting password information.

- If a RP and/or Authorized Preparer has not yet created an NY.gov username and password, and Individual User Profile in LA – Please reference ***Step 1: How to create an NY.gov ID account using the 'LA' Enrollment Link;*** and ***Step 2: How to create your User Profile in the Lobbying Application.***

How to verify the Email address listed on your Individual User Profile

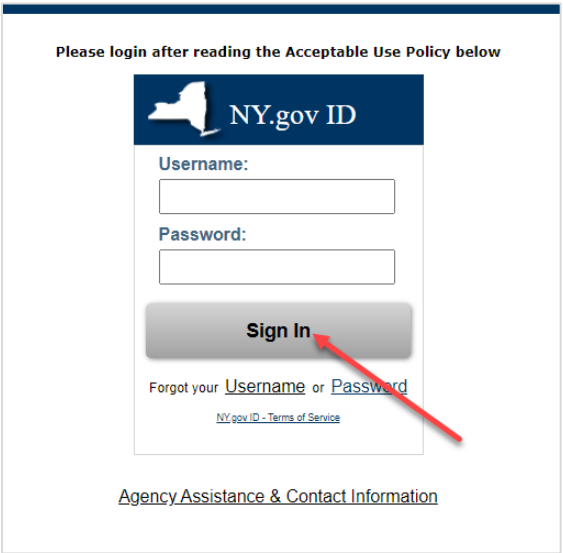
The LA will require an **Individual User** (RP and Authorized Preparer) to validate the email address listed in their **User Profile**. **Once an Individual (User) Email address is verified for the first time, filers will not have to verify their Email again unless:**

- A Filer edits the Email address recorded in their Individual User Profile by either manually updating their User Profile or via the Email Verification screen; or
- A Filer creates a NEW Individual User Profile.

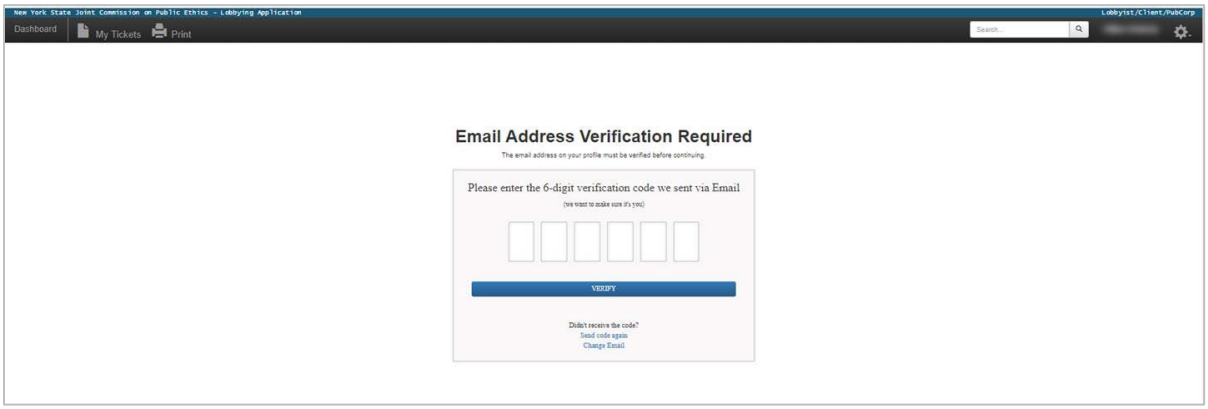
Steps to complete the Email Verification process

1. From your web browser, go to the NY.gov main page.

2. Enter your ***Username*** and ***Password*** in the appropriate fields and click '**Sign In'**.



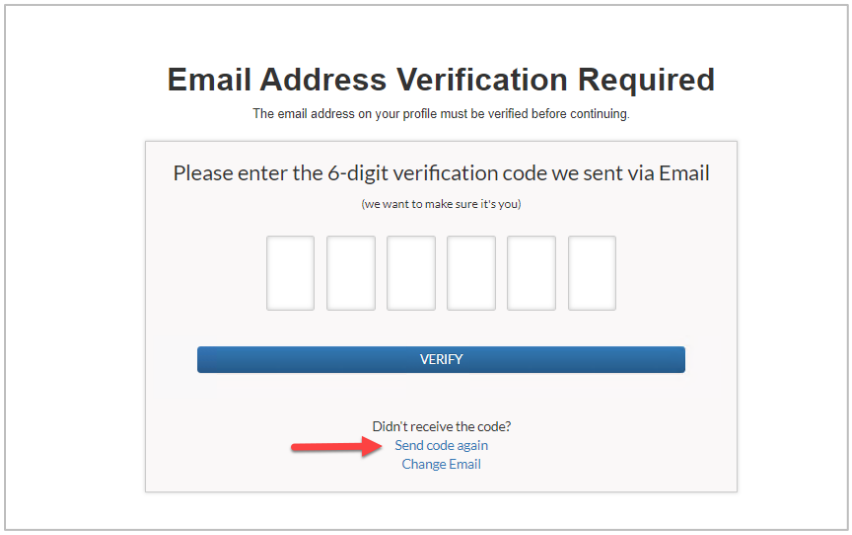
3. You will automatically be directed to the '**Email Address Verification'** screen. A six-digit verification code will be sent to the Email address listed in your **Individual User Profile** with the subject line ***COELIG Lobbying Application - Email Verification***.



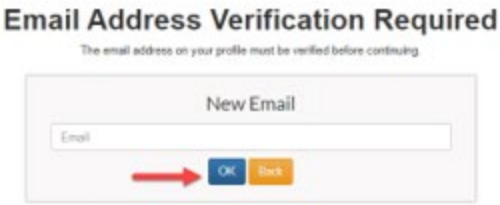
4. Enter the verification code contained in the auto-generated email and click **'Verify'**. If the email verification is successful, the following message will display on the LA dashboard, '***User Profile Email Verification Successful***'.

PLEASE NOTE: If you did not receive the verification code within ten minutes, please check your 'Junk' and 'Spam' Email folders.

5. If you have not received the verification email after checking your spam and junk email inboxes, click the **'Send code again'** link. An email with a new six-digit code will be sent to the email on file.



6. If you're unsure as to which email address is on file in the LA, click the '**Change email'** hyperlink and type a valid email address in the **'New Email'** textbox. Click **'OK'** to submit or **'Back'** to cancel and return to the previous page.



How to recertify an Individual User Profile

Individual User Profiles (RPs, and Authorized Preparers) are now required to be recertified on a **yearly basis**. The 'anniversary' date for recertification is based on the date the Profile was last certified.

Once the status of a Profile has been set to 'recertification', Filers will be notified via Email to recertify their Individual User Profile. If they do not respond to the Email, they will be alerted the next time they attempt to log-in to the LA.

There are two ways to recertify an Individual User Profile:

1. **By Email:** An email with the subject line ***'Lobbying Application – Individual Profile Recertification'*** will be automatically sent to anyone who has an **Individual User Profile** set up in LA. Filers will automatically be directed to the NY.gov login page by clicking the **'Verify Here'** hyperlink contained within the auto-generated email. This notification will only be sent to email addresses listed in Individual User Profiles.

2. **Direct Log-in:** The filer logs-in to the LA and will immediately be prompted to recertify their User Profile.

Steps to recertify your Individual User Profile by logging into the LA:

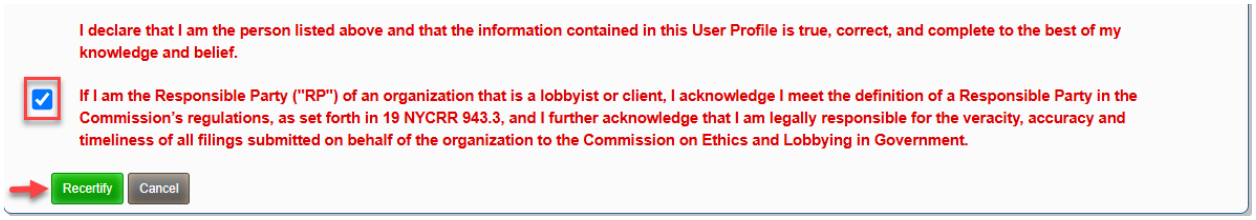
1. From your web browser, go to the NY.gov main page.

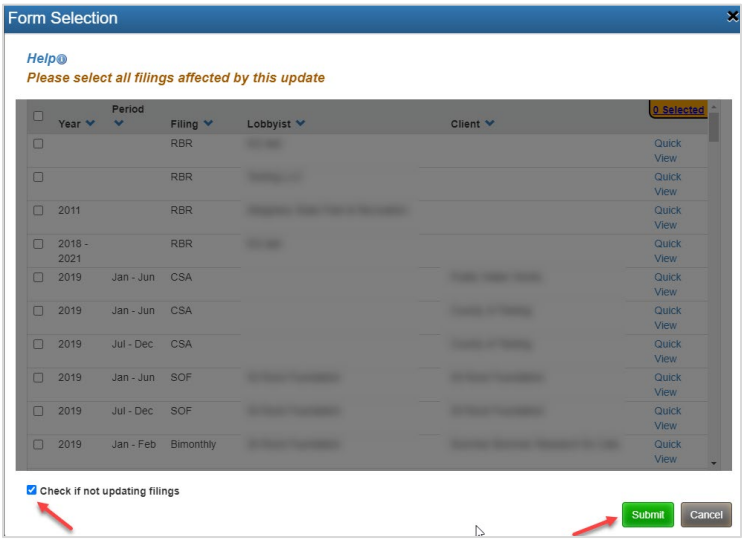
2. Enter your ***Username*** and ***Password*** in the appropriate fields and click '**Sign In'**.

3. You will automatically be directed to your **User Profile**. A red banner will display the following message: '***You need to Recertify your information'***. You will not be permitted to access your Dashboard until your information has been recertified.

4. Click the '**EDIT'** button. Verify the contact information including your name, title, business address and phone number are all accurate. If applicable, make any necessary changes.

5. Once your Profile information has been updated, click the **'Attestation check box'** to indicate you have reviewed the Attestation language and your Profile information is accurate/up-to-date, and click the green **'Recertify'** button**.**

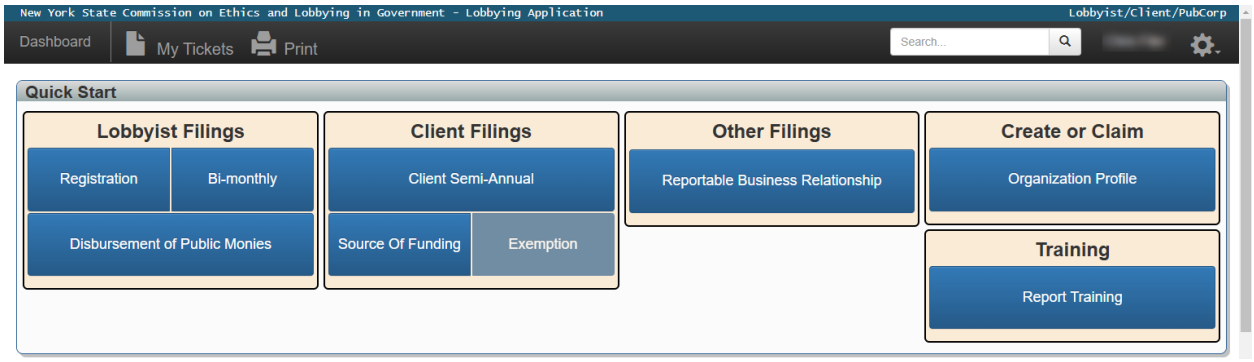




6. The **Form Selection** pop-up window will appear. If there were any changes to your Profile that should be reflected on any previously submitted filings, select the check-box next to each filing that requires an update.

Otherwise, click the '**Check if not updating filings'** check-box and click '**Submit'**.

7. Once the Individual User Profile recertification has been successfully completed, you will automatically be directed to your Dashboard in LA.



Steps to recertify an Organization Profile

Organization Profiles are now required to be recertified on a **yearly basis**. The 'anniversary' date for recertification is based on the date the Profile was last certified.

Once the status of a Profile has been set to 'recertification', Filers will be notified via Email to recertify their Organization Profile. If they do not respond to the Email, they will be alerted the next time they log-in to the LA.

> **NOTE:** Only the **RP** can complete the recertification process for an Organization Profile. LA will **not** allow an Organization to submit any filings until **both** the RPs Individual User Profile ***and*** the Organization Profile have been recertified.

There are two ways to recertify an Organization Profile:

1. **By Email:** An Email with the subject line ***Lobbying Application – Organization Profile Recertification*** will be sent to the RPs listed in the Organization Profile. Filers will automatically be directed to the NY.gov login page by clicking the **'Verify Here'** hyperlink contained within the auto-generated email. This notification will be sent to email addresses listed in the Organization Profile.

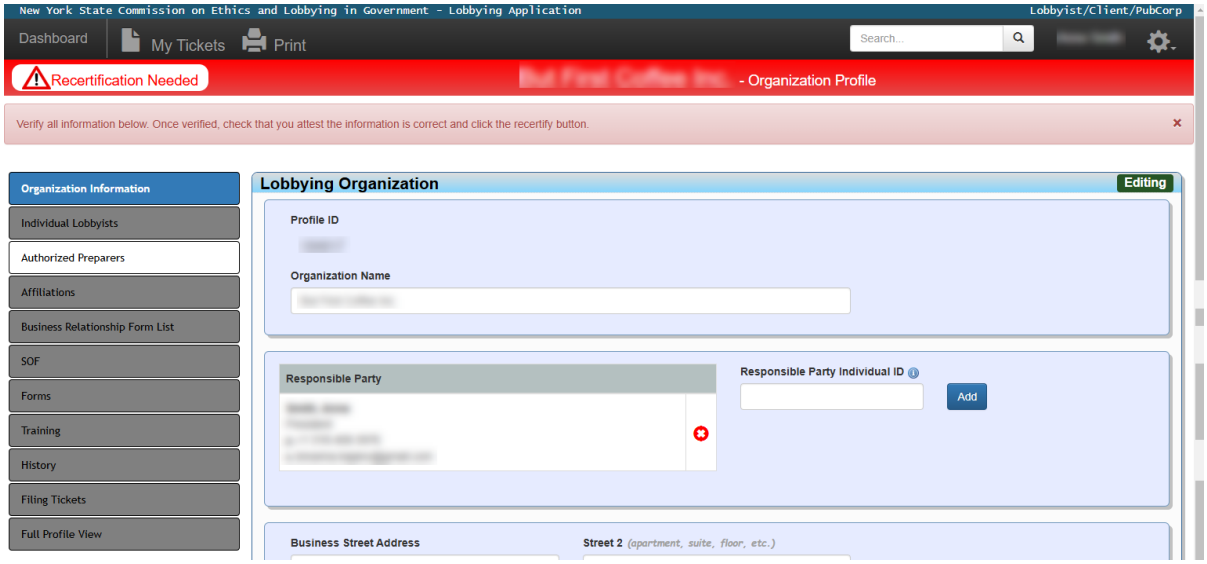
2. **Direct Log-in:** The filer logs-in to the LA and will immediately be prompted to recertify the Organization Profile.

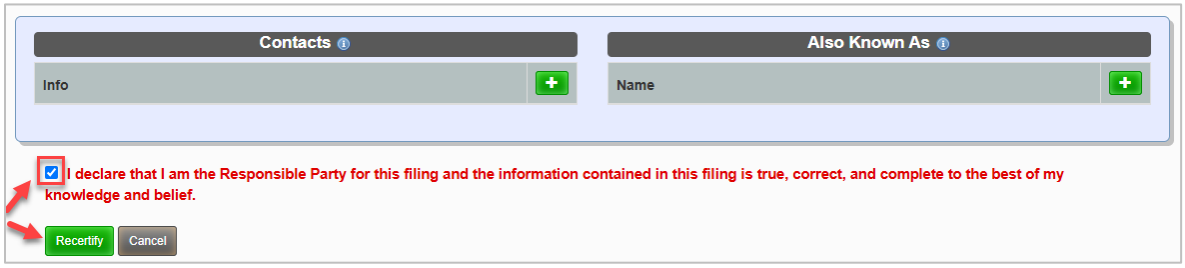
Steps to recertify an Organization Profile by logging into the LA

1. From your web browser, go to the NY.gov main page.

2. Enter your ***Username*** and ***Password*** in the appropriate fields and click '**Sign In'**.

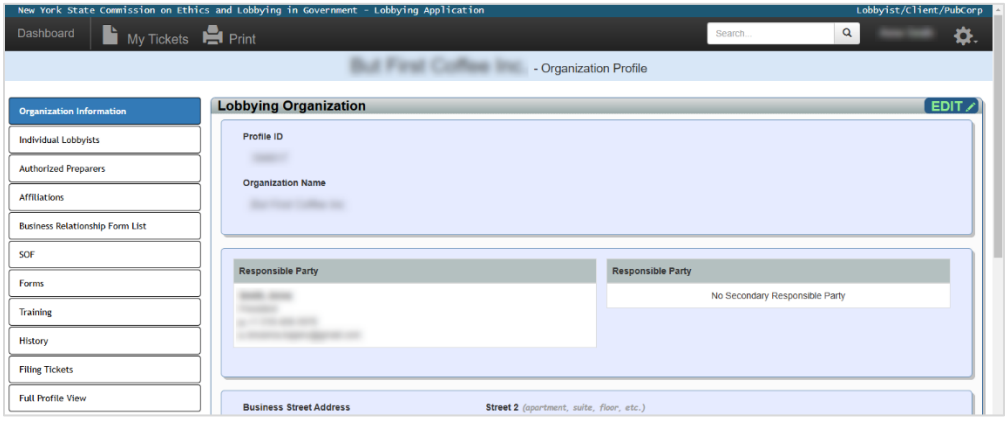
3. You will automatically be directed to the **Organization Profile 'Recertification Needed' screen**. The navigation menu of the Organization Profile except for the **'Organization Information'** and **'Authorized Preparers'** tab has been greyed out and will remain blocked until the profile has been recertified. If you do not wish to recertify this Organization Profile at this time you can select the Dashboard icon (top left corner) to access your User Profile.



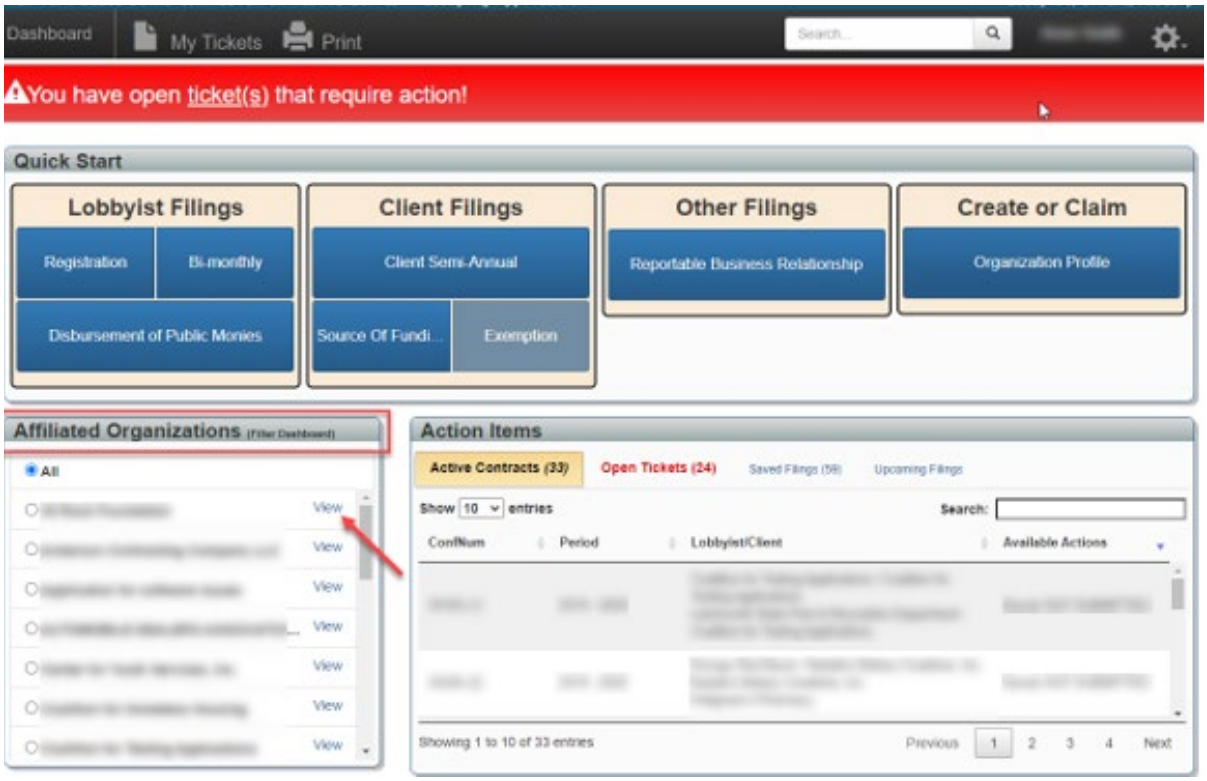
4. 

Please review the Organization name, business address, Authorized Preparers and Contacts (if any) and make any necessary changes. Once completed, click the **'Attestation check box'** and click the green '**Recertify'** button.

5. Once the **Organization Profile Recertification <u>and</u> the RP User Recertification** has been successfully completed, the Organization Profile is unlocked, and Filers will have access to all tabs contained in the Organization Profile and will be able to submit filings.



6. If recertification of an Organization Profile was bypassed when a Filer initially logged in, an Organization will only be able to **<u>save</u>** a Filing. Filings may only be submitted once the Organization and RP User Profile have **<u>both</u>** been recertified. To recertify an Organization Profile from your dashboard, click the **'View'** hyperlink next to the name of the Organization Profile listed under **'Affiliated Organizations'**.



Need help?

Contact the Lobbying Helpdesk at (518) 474-3973 or send an email to lobbyingHelpDesk@ethics.ny.gov.