Legislative Services Agency – Computer Services Division
Iowa Legislature

Lobbyist System

Contents

Log in to the Lobbyist System

- **URL**- www.legis.iowa.gov/portal/lobby
- OR click the **Applications** link at the bottom of the legislative website home page (www.legis.iowa.gov) to navigate to the sign-in screen.

See the sign in screen below:

Legislative Applications
Log in to access Legislative Applications.

Log In

Legislative users: Please sign in using your network credentials (i.e., firstname.lastname or flastna).

All other users: Please sign in with the email address used to create your account.

Username:*

Portal User name

Password:*

Portal Password

Forgot your Password?

Log In

New Users

Create an account

If you have problems or questions signing in, please contact the Help Desk at 515.281.6506.

- **Lobbyists who are already using portal applications** (including, but not limited to Bill & Rules Watch, BMS, RMS, Fiscal Notes, Redbook/Roster, and/or Required Reports) will use the same sign in information for the Lobbyist System. Enter your credentials and click **Log In**.

- **Returning lobbyists not currently using any portal applications** may need to reset their password; please click the **Forgot My Password** link provided or contact the **Lobbyist Clerk** to reset your password**.** For Lobbyist Clerk contact information, click here.

- **New lobbyists** will need to create an account; click the **Create an account** button to begin.\ You will be taken to the Create Account page below:

Create Account

Create an account to track legislation and rule making. Use Bills & Rules Watch to follow legislation, rules and publications by topic and to receive notification of new legislative activity and publications. Use Department Subscriptions to receive notification when publications pertaining to selected departments are published.

First Name:

Last Name:

Email Address:

Password:

Confirm Password:

*** All the above fields are required ***

I'm not a robot reCAPTCHA
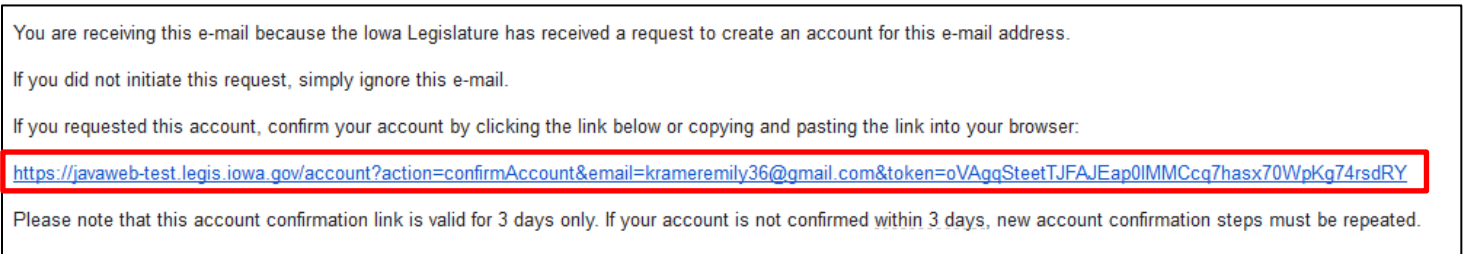Privacy - Terms

☐ I agree to the Terms of Use.

Create Account

If you are a legislative user or already have an account, click here to sign in.

If you have problems or questions signing in, please contact the Help Desk at 515.281.6506.

1. Enter the required information: first name, last name, and email address. Then create and confirm your password for the system. (As you type your password in the field, a box will appear showing the password criteria that must be met in red text. As each criterion is satisfied, it will turn green. Once all criterions are met, confirm the password by typing it again into the Confirm Password box.)

2. Check the "I'm not a robot" box and answer the question that appears by clicking the appropriate pictures displayed.

3. Check the "I agree to the Terms of Use." checkbox. You can view the terms by clicking the **Terms of Use** link on the page.

4. Click the **Create Account** button. You will see an "Account Confirmation Required" message. The text displayed states that you will receive a message at the email address you provided when creating your account. You should receive the email quickly after finishing the Create Account process.

NOTE: In some cases, the message may be mistakenly marked as SPAM and sent to the Junk email folder. Check the Junk email folder if the message does not arrive in your inbox after 10 minutes. Call the **Help Desk at 515.281.6506** for assistance if you do not receive the email. See an example of the email below:

You are receiving this e-mail because the Iowa Legislature has received a request to create an account for this e-mail address.

If you did not initiate this request, simply ignore this e-mail.

If you requested this account, confirm your account by clicking the link below or copying and pasting the link into your browser:

https://javaweb-test.legis.iowa.gov/account?action=confirmAccount&email=krameremily36@gmail.com&token=oVAgqSteetTJFAJEap0IMMCcq7hasx70WpKg74rsdRY

Please note that this account confirmation link is valid for 3 days only. If your account is not confirmed within 3 days, new account confirmation steps must be repeated.

---

5. Click the link in the message (outlined in red above) or copy and paste the link into your browser to confirm your account.

6. Please note that this account confirmation link is valid for three days only. If your account is not confirmed within three days, you must complete the create account process again.

   Once clicked, the link will return you to the portal sign in page. Use your email address as the Username and the password you created to sign into the system.

Once signed in, click the **Lobbyist System** link in the left navigation pane for access.

When you first enter the Lobbyist System after registration has opened for the upcoming session, the Edit Account/Registration page will appear.

If you have registered as a lobbyist in the past, all the information previously entered in the system will carry over and be entered on this page.

If you have not lobbied before, this is where you will enter your personal information. Your name and email address should be filled in for you, as this is information you entered when setting up your account.

You can update your information on this page at any time.

Edit Account/Registration

Enter all required information on the page. The required fields are marked with a *. Any additional information you add is optional. See the **Edit Account/Registration** screen below:

Registration

1	**User Type:***	Lobbyist ▼
2	**First Name:***	
3	**Last Name:***	
4	**Middle Name:**	

NO IMAGE AVAIL

Personal Information (Step 1 of 3)   show/hide

5	**Lobbyist Firm:** (If applicable)	
6	**Email Address:***	

☐ Share Email Info with Public

7	**Alternate Email:**	
8	**Street:***	1976 SE Pleasant Tree Ct.
9	**City:***	Waukee
10	**State:***	Iowa ▼
11	**Zip:***	50263
12	**Phone:***	515.123.4567
13	**Alternate Phone:**	515.123.4567
14	**Cell Phone:**	515.123.4567

☐ Share Cell Phone Info with Public

15	**Photo (Optional):**	Choose Files No file chosen

Guidelines for uploading a photo:

- Photo shall contain no logos;
- Photo shall only contain one person;
- Photo shall contain nothing that could be deemed offensive to a reasonable person.

If your photo contains any of the above, it will be rejected and you will be asked to submit a new photo that meets our guidelines. Photos will be shared only with legislators and internal staff and are appreciated by legislators to facilitate introductions.

16	**Lobby Legislative Branch:**	☑ Check this box if you will lobby the Legislative Branch
	Lobby Executive Branch:	☑ Check this box if you will lobby the Executive Branch
	Governor's Office:	☐ Check this box if you represent the Governor's Office

Client Information (Step 2 of 3)   show/hide

17	**Client(s):**	✎ Click to select clients

Support Staff Information (Step 3 of 3)   show/hide

Support Staff (who is not a lobbyist) is someone you wish to file on your behalf. You can search support staff by email address, first name or last name.

18	**Email Address:**	
	First Name:	
	Last Name:	

☐ Check this box if the support staff person has the same street address and phone number as the lobbyist.

Create   Reset

4

1. **User Type (Required)**

   - The user type is defaulted to "Lobbyist." You may also choose "Support staff" or "Client contact" from the drop-down provided. Click the link at left entitled **FAQ & Glossary** and see page 2 for more information on the different user types available.

NOTE: If the user type is grayed out, you will be unable to change it. If you need to change your user type in the system, please contact the Lobbyist Clerk. For Lobbyist Clerk contact information, click here.

2. **First Name (Required)**

   - This field should already be filled in for you; this is how your first name will appear on the legislative website. Your first name can be edited on this page at any time.

3. **Last Name (Required)**

   - This field should already be filled for you; this is how your last name will appear on the legislative website. Your last name can be edited on this page at any time.

4. **Middle Name (Optional)**

   - This field is optional. You may enter a middle name or middle initial, if you wish, and it will appear on the legislative website.

5. **Lobbyist Firm (Optional)**

   - When entered, this information helps tie Associates and Support Staff to the Lobbyist Firm. This field is optional.

6. **Email Address (Required)**

   - The email address will be filled in for you; this is your Username.
   - This will be the email address used to send out announcements on lobbyist registration, report filing, and training opportunities. This is also what legislators may use to contact you. Make sure the email address entered is accurate and update it, as needed, on this page.
   - If you wish to share your email address with the public, check the "Share Email Info with Public" box. If you check the box, your email address will be visible to the public.

Email addresses are only shared with legislators and limited support staff if the "Share Email Info with Public" box is NOT checked. Only by checking the box will you make the email address visible to all.

7. **Alternate Email (Optional)**

   - Enter an additional email address if you wish. It is not required. This email will only be accessible to the Lobbyist Clerk and support staff.

8. **Street (Required)**

9. **City (Required)**

10. **State (Required)**

11. **Zip (Required)**

- Enter your Street address, City, State, and Zip code, respectively. This address will appear on the public website. All these fields are required.

12. **Phone (Required)**

- Enter your 9-digit phone number in the field provided. This phone number will appear on the public website.

13. **Alternate Phone (Optional)**

- Enter an alternate phone number if you wish. It is not required. This phone number will only be accessible to the Lobbyist Clerk and support staff.

14. **Cell Phone (Optional)**

- Enter your cell phone number, if desired. The cell phone number will appear on the public website if the "Share Cell Phone Info with Public" box is checked.

Cell phone numbers are only shared with legislators and limited support staff if the "Share Cell Phone Info with Public" box is NOT checked. Only by checking the box will you make the cell phone number visible to all.

15. **Photo (Optional)**

- You may upload a photo of yourself that will be displayed on the internal portion of the site. Once you upload your photo, it will NOT appear on your account immediately, but will go into a queue to be approved by the Lobbyist Clerk.
- You will receive an email when your photo is approved or rejected. If approved, the photo will then be added to your account.

Guidelines for uploading a photo:
- Photo shall contain no logos;
- Photo shall only contain one person;
- Photo shall contain nothing that could be deemed offensive to a reasonable person.

If your photo contains any of the above, it will be rejected, and you will be asked to submit a new photo that meets our guidelines. Photos will be shared only with legislators and internal staff and are appreciated by legislators to facilitate introductions.

16. **What branches will you lobby? (Required)**

- Check the appropriate box(es) to indicate whether you will be lobbying the Legislative Branch, the Executive Branch, and/or represent the Governor's Office. Check all that apply.
- As this is a required field, at least one of the boxes must be checked.

17. Client Information (Required)

- For returning lobbyists, clients you have represented in the previous session will be displayed under the Client Information heading. (See example below)
- New lobbyists will not see any clients in this section.

Client Information (Step 2 of 3)   show/hide

Client(s):   3M Company (Added on 10/19/2017)
             AARP Iowa (Added on 10/19/2017)
             Sprint (Added on 10/19/2017)
             ✏️ Click to select clients   ➕ Click to add new client

- **To edit a client's information**, click the linked client name (outlined in red above). This will pop up a window where you can change client information, including address and client contacts. See below:

Edit Client Information

Client:* 3M Company

The client name will NOT be editable. If you need to change the client's name, you must contact the Lobbyist Clerk.

If you believe the Client Name needs to be changed, you must contact the Lobbyist Clerk.

Address:* 600 E Court Ave., Ste 100
City:* Des Moines
State:* Iowa
Zip:* 50309
Phone: 515.123.4567

Update address and/or phone number by typing in the appropriate field(s).

☐ Personal Interest

If registered client is "Personal Interest," a client report is automatically filed July 1st as $0.00. Report amendable if needed.

Contact #1*
○ Check here to update the current client contact's information
○ Check here if the current contact is being removed and a new person is being added as a client contact

Email:* acarroll@aarp.org
First Name:* Anthony
Last Name:* Carroll
Phone:* 515.697.1015
Secondary Email:
Secondary Phone: 515.123.4567

Contact #2 *
○ Check here to update the current client contact's information
○ Check here if the current contact is being removed and a new person is being added as a client contact

Email:* banderson@aarp.org
First Name:* Brad
Last Name:* Anderson
Phone:* 515.697.1002
Secondary Email:
Secondary Phone: 515.123.4567

Click the appropriate radio button under Contact #1 and/or contact #2 to update the Client Contact information. These fields will not be editable until one of the radio buttons is selected.

If you wish to *change the current client contact's information*, click the first radio button, and make your changes.

If you are *removing the current client contact and adding a new client contact*, click the second radio button and make your changes.

Enter a summary of the changes made in the Notes section provided.

Notes:*
(Summary of changes)

(Maximum of 500 characters allowed)

Save   Cancel

Click **Save** when complete to save your changes.

7

*You will receive an email notification when a client you are associated with has any information changed in the system. If you do not wish to receive these emails, uncheck the box on the **Preferences** page next to "Email alert when associated client information has changed."*

- **To add or remove a client** from your list of clients, click the ✎ next to **Click to select clients**. You will then see a list of available clients from which you can select from the list on the left. See below:
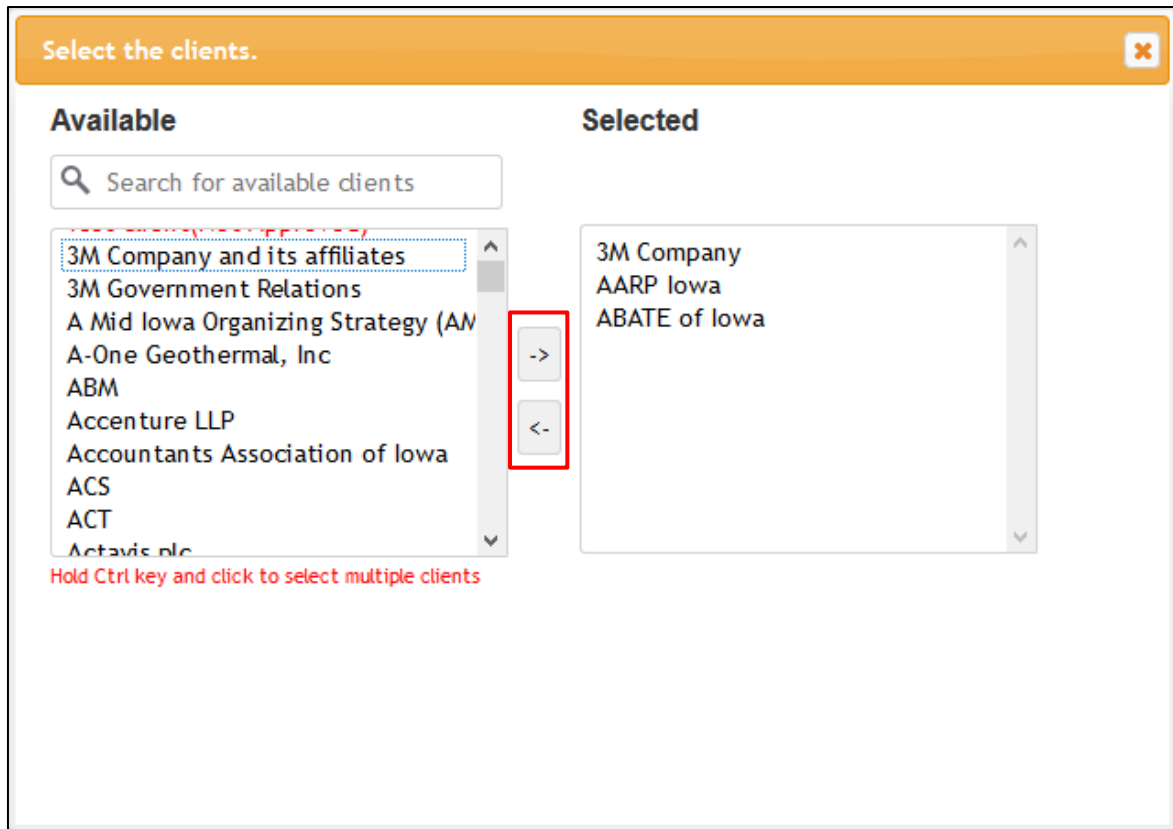
- o **To search for a client in the list of available clients**, type a word into the 🔍 Search for available clients field. This will filter out and display only the clients that contain this word.

- o **To add a client**, select a client from the list of Available clients on the left. (Hold down the Ctrl key and left click to select multiple clients at once.) Then click the right-facing arrow to add the client(s) to your list of clients.

- o **To remove a client**, select a client from the list of Selected clients on the right. (Hold down the Ctrl key and left click to select multiple clients at once.) Then click the left-facing arrow to remove the client(s) from your list of selected clients.

*There will be a date stamp next to each client's name stating when the client was added to or removed from your lobbyist account if changes were made after the initial registration. This date stamp will also appear on the public website.

**When removing a client, you will see a prompt asking if you would like to file a client report for that client immediately. If a client report was already filed for the client you removed, you will not see this prompt upon client removal.

- If you do not see a client that you represent in the list of available clients, click the ➕ next to **Click to add new client**. The Client Information section will expand and allow you to enter a new client into the system. See below:

New Client 1 ❌

Client:*

To cancel the addition of a new client, click here.

Address:* 1976 SE Pleasant Tree C

City:* Waukee

Enter the client name and an address for the client. (Required).

State:* Iowa

Zip:* 50263

Enter a phone number for the client (Optional).

Phone: 515.123.4567

☐ Personal Interest

If you are lobbying on behalf of yourself rather than a client, enter your own name and address (phone number optional) and then check the box next to "Personal Interest".

If registered client is "Personal Interest," a client report is automatically filed July 1st as $0.00. Report amendable if needed.

NOTE

Contact #1*

Email:*

First Name:*

Last Name:*

Enter the email, name, and phone number of the person to be contacted about the client. (Required)

Phone:* 515.123.4567

Secondary Email:

Secondary Phone: 515.123.4567

Two contact methods are required. If you wish to enter a secondary email or secondary phone number for Contact #1, this will meet the requirement and the * denoting required fields will be removed from Contact #2.

Contact #2*

Email:*

First Name:*

Last Name:*

Phone:* 515.123.4567

Enter the email, name, and phone number of a second person to be contacted concerning the client. (Required unless the Personal Interest box is checked OR you entered a secondary email or secondary phone number for Contact #1).

Secondary Email:

Secondary Phone: 515.123.4567

- o Repeat this process until all new clients are added to the system.

*When you add a new client to the system, it will NOT become available immediately, but will be pending the approval of the Lobbyist Clerk. You will receive an email when the new client addition is approved or rejected by the clerk. (This email preference is on by default. If you do not wish to receive an email message about this, click the **Preferences** link at left and uncheck the box next to "Email alert when new client has been approved or rejected.") Once approved, the client will be added to your account automatically.*

18. Support Staff Information (Optional)

- If you have support staff assisting with entering information, declaring, or filing pre-function and/or function reports on your behalf, enter their email address, first name, and last name in the fields provided. <u>This person is NOT a lobbyist.</u> See below:

- If the person entered as support staff has the same street address and phone number as the lobbyist, check the box below the last name field. (Outlined in red above)

- Repeat this process to add as many support staff persons as you wish.

- To remove a support staff person, click the red X in the Remove column of the table (circled in green above).

When you have finished entering all required/applicable information for your account, click the **Save** button at the bottom of the page to save the information (outlined in blue above).

Clicking the **Reset** button at the bottom of the page will remove any account information that was changed in the current online session (outlined in blue above).

After clicking the **Save** button:

- <u>Returning Lobbyist</u>- You will be automatically approved to begin using the system for declaring on bills and filing reports for the current legislative session.

- New Lobbyist- You will NOT be added to the system immediately. Your registration information will be sent to the Lobbyist Clerk for approval. You will receive an email when your registration has been approved. After receiving the email, you will be able to use the system for declaring on bills and filing reports for the current legislative session.

Associates

An associate is a person (typically this is another lobbyist at your firm) that you give permission to declare on bills on your behalf. The screenshot below shows that John Doe and Jane Doe are associates.

Add/Remove Associates:

1. Click the **Associates** link in the left navigation pane.

- Any associates you have added to your account will be displayed on the page.

- If you have not added any associates and no one has added you as an associate, the tables will not contain any entries.

NOTE: Just because you have given an associate permission to declare on your behalf does NOT mean that you can declare on behalf of that associate. The associate would need to add you as an associate to their account for you to be able to declare on their behalf.

2a. To **add an associate**, click the ⊞ next to **Click to add Associates** (circled in red above), choose the name of the person you wish to add as an associate, and then click the **Associate** button. That person is now your associate and can declare on your behalf. Repeat this step, if necessary, until all desired associates are added.

2b. To **remove an associate**, click the ✗ (circled in green above) next to the user you no longer want as an associate. Once removed, that relationship no longer exists. Repeat this step, if necessary, until all desired associates are removed.

There are two tables on this page: Associates I Added & Associates Who Added Me. The first table contains all the people you have granted permission to declare on your behalf. The second table shows all the people who have added you as their associate, giving you permission to declare on their behalf. If the same name appears in both tables, it indicates the relationship is reciprocal, meaning that person can declare on your behalf AND you can declare on their behalf.

NOTE: You can remove not only associates you added, but also people who have added you as their associate by clicking the ✗ next to their name. (Circled in green on the screenshot above.)

Make Declarations

To declare on a bill, click the **Make Declarations** link in the left pane.

Depending on how many people you are declaring for, and your Declaration Preferences, the screens may look different than the ones shown below.

Declare Yourself on Bills:

1. After clicking **Make Declarations** on the left, check the box in front of your name ONLY and click **Continue**. See below:

NOTE: Your name and all the lobbyists who have given you permission to declare on their behalf will be checked by default.

Declarations (John Doe)

Please select one or more users to make declarations on their behalf. All users will be checked by default.

Select Users: ☑ John Doe   ☐ Jane Doe

Continue Cancel

You will then see a screen like the one below:

Declarations (John Doe)

Declarations are done for:

John Doe

Declaration 1   Click to add 1 ⬍ client ➕ ✖

Bill Number: [   ]
e.g. HF 12, HF12

○ For ○ Against ○ Undecided   **Lobbyists (Lobbyist will display when client is selected.)**

Select a Client ⌄   ✖
Select a Client ⌄   ✖
Select a Client ⌄   ✖
Select a Client ⌄   ✖
Select a Client ⌄   ✖

Click **Next** to review your declaration(s) before submitting.

Add More Bills Next Cancel

- To add another row to the table for another client declaration on the same bill, enter/adjust the number in the text box and then click the green plus icon. The number you enter in the box will add that number of rows to the table. (Outlined in orange above.)

- To declare on more bills at the same time, click the **Add More Bills** button below the table (outlined in red above). Each time you click the Add More Bills button, a new declaration table will be added to the page.

2. Enter the bill number for the bill you wish to declare on in the **Bill Number** text box (outlined in orange on the image below). You must enter the bill number in the proper format. (Ex: "HF 12", "HF12"; the letters do not need to be capitalized.) Then click outside of the text box. The short bill title should be automatically inserted for you under the bill number.

3. Enter your position on the bill using the radio buttons provided: For, Against, or Undecided. (Outlined in green below.) This can be changed on an individual basis as well.

4. Select the client(s) for whom you are declaring from the drop-down(s) in the first column at left (outlined in purple below). Only the clients you have added to your account will display in this list. Select as many clients as you wish, using each row of the table for a different client.

5. In the Lobbyists column, the person who is declaring on the bill is shown. You can change the declaration by choosing another position from the drop-down next to the lobbyist name (outlined in blue on the screen below).

6. Click the **Comments** icon 🖳 to add comments on the bill, the position, or the client (outlined in **black** below). These comments are optional and should be brief. Comments WILL be displayed on the public website.

NOTE: Click the ☒ in the last column to delete that row from the declaration table.

7. When finished, click the **Next** button to move to the confirmation screen (outlined in red on the screen below).

*Clicking **Next** will NOT submit declarations. You will be taken to a confirmation screen where you can view your declaration(s) before submitting.*

Click the **Cancel** button to cancel the declaration(s).

See example screen below:

8. After clicking **Next**, the declaration confirmation screen appears. This screen displays the declaration(s) you made in the previous steps. See below:
   - To confirm/submit the declaration(s), click the **Submit Declaration** button.
   - To edit the declaration(s), click the **Edit** button. (<u>DO NOT</u> use the back button in the browser.) Make the necessary changes and click **Next** again to return to the confirmation page.
   - To cancel the declaration(s), click **Cancel**.

Declarations are done for:

John Doe

Please review declaration(s) and click **Submit Declaration** to complete.

Declaration 1

Bill Number: HF 10

A bill for an act relating to reduced fees for camping and other special privileges for certain older Iowans.

Client	Lobbyists		
3M Company	**Doe J**	For	
AARP Iowa	**Doe J**	Against	Comments here...
ABATE of Iowa	**Doe J**	Undecided	

Please review declaration(s) and click **Submit Declaration** to complete.

Submit Declaration | Edit | Cancel

After clicking the **Submit Declaration** button on the confirmation screen, you will see a message at the top of the screen in green that confirms your declaration(s) was/were made successfully and you will see the declaration(s) made below.

Declarations have been made successfully. If you wish to declare again with the same "lobbyists/associates", please click the "Declare Again" button.   X

New Declaration

Lobbyist System

Edit Account
Associates
Declarations
Function Reports
Client Reports
Preferences
Terminate Account
My Registrations
FAQ & Glossary

Legislative Document Research

Declarations (John Doe)

Declarations are done for:

John Doe

Declaration 1

Bill Number: HF 5

A bill for an act eliminating a requirement that taxpayers indicate on their tax returns the presence or absence of health care coverage for their dependent children and apply for certain public health care coverage, and including effective date and retroactive applicability provisions.

Client	Lobbyists	
3M Company	Doe J	For
AARP Iowa	Doe J	Undecided
ABATE of Iowa	Doe J	Against

Declare Again | Cancel

Click the **Declare Again** button to declare on another bill with the same user you selected in Step 1 (Yourself).

To view all your declarations, click the **View Declarations** link on the left.

Declare Others on Bills:

*You may only declare on behalf of another lobbyist if they have added you as an **Associate**. (For more information on Associates, see Page 11)*

1. Click the **Make Declarations** link in the left navigation pane. Uncheck the box next to your own name, check the box(es) next to the associate name(s) you wish to declare on behalf of and click **Continue**.

NOTE: Your name and all the lobbyists who have given you permission to declare on their behalf will be checked by default.

2. Enter the bill number for the bill you wish to declare on in the **Bill Number** text box. You must enter the bill number in the proper format (Ex: "HF 12", "HF12") and then click outside of the text box. The short bill title should be automatically inserted for you under the bill number.

3. Enter your position on the bill using the radio buttons provided: For, Against, or Undecided. This can be changed on an individual basis as well.

4. Select the client(s) for the associate(s) on whose behalf you are declaring from the drop-downs provided in the first column. Only the clients that are represented by the associate(s) you selected in Step 1 will be displayed in this list. Select as many clients as you wish, using each row for a different client. To add another row to the table for another client declaration on the same bill, enter/adjust the number in the text box above the table and then click the green plus icon. The number you enter in the box will add that number of rows to the table.

5. In the Lobbyists column, the person for whom you are declaring is shown. You can change the declaration(s) individually by choosing a different position from the drop-down next to the lobbyist name.

6. Click the **Comments** icon to make any comments on the bill, position, or client. These comments are optional. Comments WILL be displayed on the public website.

NOTE: Click the in the last column to delete that row from the declaration table.

To declare on more bills at the same time, click the **Add More Bills** button below the table. Each time you click this button, a new declaration table will be added to the page.

7. When finished, click the **Next** button to move to the next step. Clicking **Next** will NOT submit the declaration(s). You will be taken to a confirmation screen where you can view your declaration(s) before submitting.

   Click the **Cancel** button to cancel the declaration(s).

8. After clicking **Next**, the confirmation screen appears. This screen displays the declaration(s) you made in the previous steps.
   - To confirm/submit the declaration(s), click the **Submit Declaration** button.
   - To edit the declaration(s), click the **Edit** button. (DO NOT use the back button in the browser.) Make the necessary changes and click **Next** again to return to the confirmation page.
   - To delete the declaration(s), click **Cancel**.

After clicking the **Submit Declaration** button on the confirmation screen, you will see a message at the top of the page in green that confirms your declaration(s) was/were made successfully and you will see the declaration(s) made below. See page 14 for an example of the declaration confirmation screen and the declaration successful message displayed.

Click the **Declare Again** button to declare again with the same user(s) you selected in Step 1.

To view all your declarations, click the **View Declarations** link on the left.

Declare Yourself AND Others on Bills:

1. Click the **Make Declarations** link in the left navigation pane. Check the boxes next to your name and any additional associate name(s) and click **Continue**. See below:

2. On the next page, enter the bill number for the bill you wish to declare on in the **Bill Number** text box. (You must enter the bill number in the proper format; Ex: "HF 12", "HF12".) Then click outside of the text box. The bill title should be automatically inserted for you under the bill number.

3. Enter your position on the bill using the radio buttons provided: For, Against, or Undecided. This can be changed on an individual basis as well.

4. Select the client(s) on whose behalf you are declaring from the drop-downs provided in the first column. In this case, the client drop-downs contain the combined list of all clients represented by you and the associate(s) you selected in Step 1. The system will NOT allow a user to declare for a client they do not represent. Select as many clients as you wish, using each row for a different client. To add another row to the table for another client declaration on the same bill, enter/adjust the number in the text box above the table and then click the green plus icon. The number you enter in the box will add that number of rows to the table.

5. In the Lobbyists column, the person for whom you are declaring is shown. You can change the declaration(s) individually by choosing another position from the drop-down next to the lobbyist name.

6. Click the **Comments** icon to make any comments on the bill, position, or client. These comments are optional. Comments WILL be displayed on the public website.

NOTE: Click the in the last column to delete that row from the declaration table.

To declare on more bills at the same time, click the **Add More Bills** button below the table. Each time you click this button, a new declaration table will be added to the page.

7. When finished, click the **Next** button to move to the next step. Clicking **Next** will NOT submit the declaration(s). You will be taken to a confirmation screen where you can view your declaration(s) before submitting.

    Click the **Cancel** button to cancel the declaration(s).

8. After clicking **Next**, the confirmation screen appears. This screen displays the declaration(s) you made in the previous steps.
    - To confirm/submit the declaration(s), click the **Submit Declaration** button.

- To edit the declaration(s), click the **Edit** button. (<u>DO NOT</u> use the back button in the browser.) Make the necessary changes and click **Next** again to return to the confirmation page.
- To delete the declaration(s), click **Cancel**.

After clicking the **Submit Declaration** button on the confirmation screen, you will see a message at the top of the page in green that confirms your declaration(s) was/were made successfully and you will see the declaration(s) made below. See page 14 for an example of the declaration confirmation screen and the declaration successful message displayed.

Click the **Declare Again** button to declare again with the same user(s) you selected in Step 1.

To view all your declarations, click the **View Declarations** link on the left.

View & Edit Declarations on Bills:

To show all previous declarations and/or change recent declarations, click on the **View Declarations** link in the left navigation pane. You will see something like the screen below:

Declarations

General Assembly: 87 (01/09/2017 - 01/13/2019) ▼

Following is a list of declarations made for the selected General Assembly. Please enter at least one of the search criteria to search declarations.

Date: [＿＿＿＿] to [＿＿＿＿]

Bill: [＿＿＿＿]

Declaration: [＿＿＿＿ ˅]

Client: [＿＿＿＿]

Search   Cancel   📊 Download Excel

Bill	LSB Number	Declaration	Client	Date	Declared By	Comments (Optional)	Withdraw/Delete
HF 123	1799HH	Undecided	1st Amendment Partnership	11/07/2018 10:35 AM	Emily Kramer	💬	📄
HF 456	1771YH	Against	3M Company	11/07/2018 10:35 AM	Emily Kramer	💬	📄
SF 510	1047SV	Against	1st Amendment Partnership	11/07/2018 10:34 AM	Emily Kramer	💬	📄
SF 510	1047SV	For	3M Company	11/07/2018 10:34 AM	Emily Kramer	💬	📄
SF 510	1047SV	Undecided	Iowa Division of Banking	11/07/2018 10:34 AM	Emily Kramer	💬	📄

- The screen will display all declarations made for the current General Assembly (GA).
- If you have lobbied previously and wish to view (but not edit) old declarations, click the arrow ▼ (circled in red on the screen above) and choose a previous GA.
    - The screen will refresh, and the declarations made for that GA will display on the screen.

The Date (Range), Bill, Declaration, and Client fields at the top of the page allow you to filter out only certain declarations. This section is outlined in orange on the screen above.
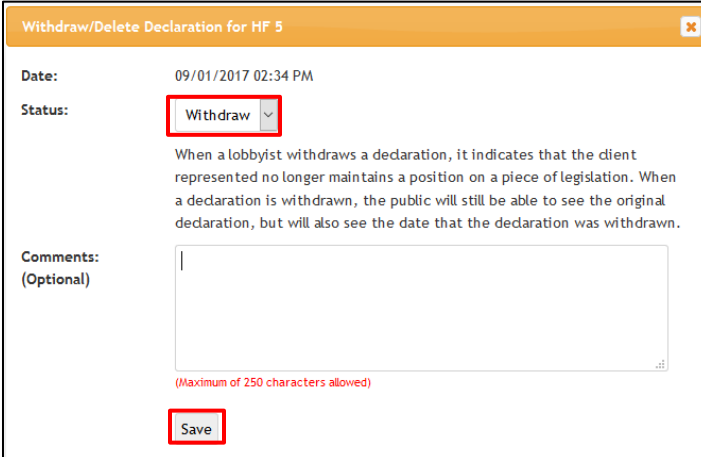
- Entering the start and end dates into the date fields provided and then clicking the **Search** button will display only declarations made within that date range.
- Entering "HF123" into the Bill field and clicking the **Search** button will display only declarations made on HF 123.

- You can choose a declaration/position from the Declaration drop-down to filter out only the declarations with that position. For example, selecting "For" from the Declaration drop-down and hitting the **Search** button would show only "For" declarations.
- If you wish to view only declarations you made on behalf of a certain client, type all or part of the client's name into the Client field and hit the **Search** button to display only declarations made for that client.

To clear any search results and display all declarations, click the **Cancel** button. After clicking **Cancel**, your screen will refresh to show all declarations for the selected GA.

Functionality in the Declaration Table:

- Click on any underlined column heading in the table to sort declarations by that criterion. For example, if you wish to sort the table of declarations by bill number, click the underlined "Bill" column heading and the declarations will sort numerically by bill number.

- Click on a linked **Bill Number** in the Bill column to be shown the full text of the bill and that bill's information in the BillBook application. A new tab will open showing the bill and its associated information in BillBook.

- Click the icon in the **Comments** column [icon] to enter comments or view comments entered. Comments are optional. Comments WILL be displayed on the public website.

- Click the **Withdraw/Delete** icon [icon] to withdraw or delete a declaration. In the box that appears choose withdraw or delete from the status drop-down and enter any comments (optional). Click **Save**. See below:

- o Withdraw - When a lobbyist withdraws a declaration, it indicates that the client represented no longer maintains a position on a piece of legislation. When a declaration is withdrawn, the public will still be able to see the original declaration, but will also see the date that the declaration was withdrawn.

- o Delete - When a lobbyist deletes a declaration, it indicates that the declaration was made in error. A declaration may only be deleted by the lobbyist for 24 hours after the declaration was made. After 24 hours have passed, deletions cannot be made by the lobbyist; this is by design. When a declaration is deleted, it is no longer visible to the public on the website. We maintain a record internally of the declaration and its deletion. Contact the Lobbyist Clerk with questions.

Function Reports

For written instructions on creating and editing pre-function and function reports, click the PDF icon in front of the Function Reports link in the Lobbyist System navigation pane at left or click here.

Client Reports

For written instructions on creating and editing client reports, click the PDF icon in front of the Client Reports link in the Lobbyist System navigation pane at left or click here.

Preferences

By default, all Notification Preferences except the last listed will be checked, as shown below.

- To change your notification preferences, click the **Preferences** link in the left navigation pane.

You will see the page below. If you do not wish to receive email notifications about an action listed, simply uncheck the box next to that action and then click the **Save** button. You may change your preferences at any time.

Preferences

Select your email preferences by checking checkboxes to receive email notifications. To clear saved settings, uncheck the checkboxes and click Save.

Notification Preferences

- ☑ Email alert when registration has been approved.
- ☑ Email alert when new client has been approved or rejected.
- ☑ Email alert when account information is changed.
- ☑ Email alert when associated client information has changed.
- ☑ Email alert when associates are changed.
- ☑ Email alert when declarations are made.
- ☑ Email alert when filing a client report or editing a client report.
- ☑ Email alert when filing a function report or editing a function report.
- ☑ Email alert when a declared bill is redrafted.
- ☑ Email alert when a client is associated by other lobbyist.
- ☑ Automatically create subscription list by client.
- ☑ Automatically create master subscription list.
- ☐ Send Bills and Rules watch to all support staff.

Declaration Preferences

Default number of declarations on 'Make Declarations' page: 1

Default number of clients for each declaration section on 'Make Declarations' page: 5

Save   Cancel

- Under the **Declaration Preferences** heading, you can set the default number of bill declaration tables you wish to see on the **Make Declarations** page.

- You can set the default number of clients (rows) for each declaration table on the **Make Declarations** page here.

Enter the desired number for each option by using the arrows provided in the boxes or typing in the number(s). You may change these numbers at any time by revisiting the Preferences page, making changes, and then clicking **Save**.

- After setting your preferences, click the **Save** button to finish.

- To disregard any changes made, click the **Cancel** button.

Terminate Account

- If you have registered and been approved as a lobbyist for the current session but wish to terminate your account, click the **Terminate Account** link along the left.

You will be asked to confirm your account termination. See below:
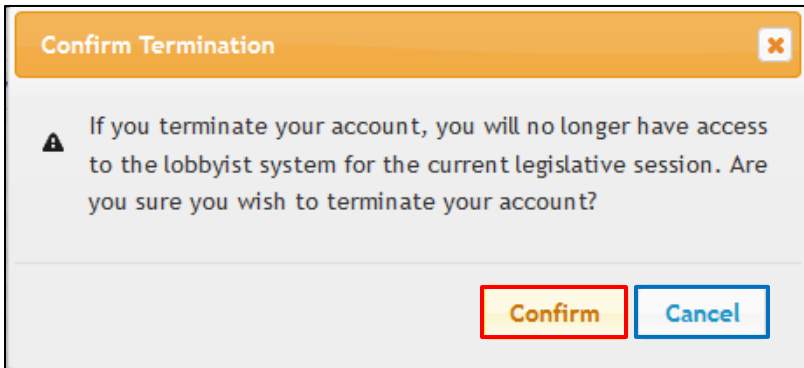
- If you wish to terminate your account, click the **Confirm** button (outlined in red above).

- Click the **Cancel** button (outlined in blue above) to cancel your account termination request.

NOTE: After terminating your account, you can still log into the system to view your account information and file Client Reports. You will no longer be able to edit your account information, add/remove associates, make declarations, or file pre-function and function reports. You will be able to view the information entered for your account, but everything will be "read-only."

*If you have mistakenly terminated your account or need your account reactivated, you must contact the Lobbyist Clerk. Contact information for the Lobbyist Clerk can be found on our website here.

My Registrations

If you wish to view a list of all sessions for which you have been a lobbyist, click the **My Registrations** link at left. This will show a table containing all sessions in which you were an active lobbyist.

You will see checkmarks to denote whether you lobbied the Legislative Branch, the Executive Branch, and/or represented the Governor's Office during each session.

FAQ & Glossary

For a list of frequently asked questions and answers, as well as a glossary of terms used in the Lobbyist System, click the **FAQ & Glossary** link at left or click here.

Lobbyist Training Video

A video of the Lobbyist System Training is posted in the portal for your reference.

To watch the video, click the **Lobbyist Training Video** link on the left and then click the **Play** but ▶

Bills & Rules Watch Interaction

In the Lobbyist System, you will be automatically subscribed to receive email notifications when there is action taken on legislation on which you have declared.

A separate collection will be created for you in Bills & Rules Watch for each client you represent. Declarations on bills for the client will result in the bill being added to that client's collection.

Refer to the Bills & Rules Watch User Guide for an explanation of notifications and system functionality.

There is also a video tutorial on our website subscriptions and the Bills & Rules Watch application on YouTube.

- **Support staff can also receive the email notifications sent from a lobbyist's Bills & Rules Watch collections, if (1) the proper box is checked on the Preferences page. See below:**
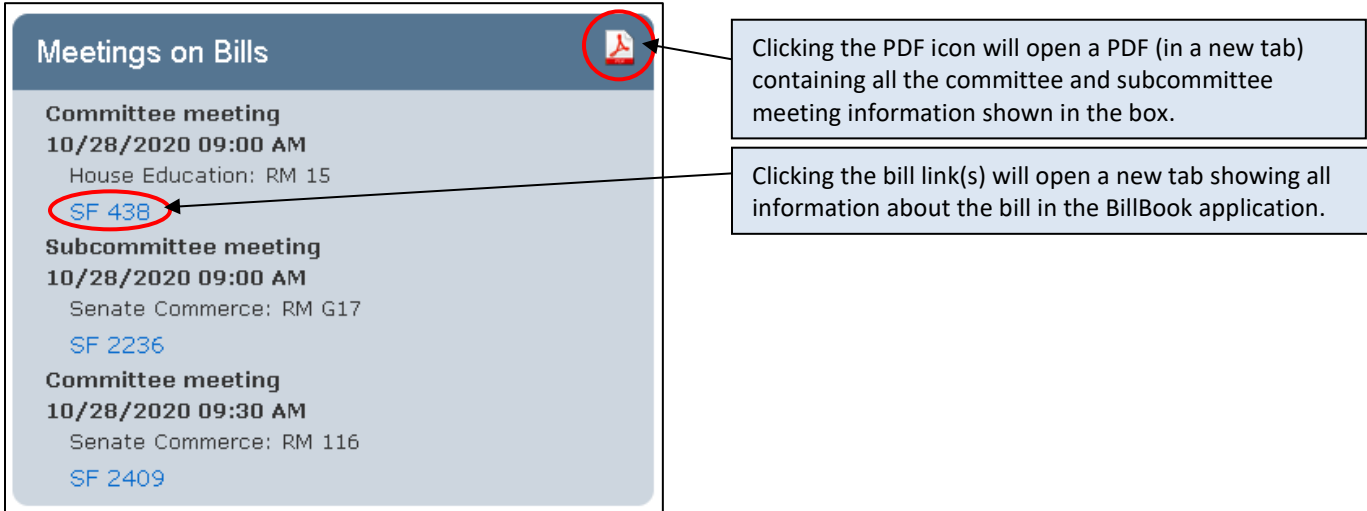
☑ Send Bills and Rules watch to all support staff.

AND (2) the Support Staff person is added to the lobbyist's account on the Edit Account page.

NOTE: Support staff CANNOT view or edit the lobbyist's Bills & Rules Watch collections. The support staff person will only receive the emails sent by the system if the above criteria is met.

NOTE: We have added functionality in the Bills & Rules Watch application for lobbyists that will show any upcoming committee and subcommittee meetings for bills in your collection(s).

At left in Bills & Rules Watch, you will see a **Meetings on Bills** table showing scheduled committee and subcommittee meetings for the current day.

The committee schedule displays scheduled meetings on bills *in all collections*. See example below:

Clicking the PDF icon will open a PDF (in a new tab) containing all the committee and subcommittee meeting information shown in the box.

Clicking the bill link(s) will open a new tab showing all information about the bill in the BillBook application.