

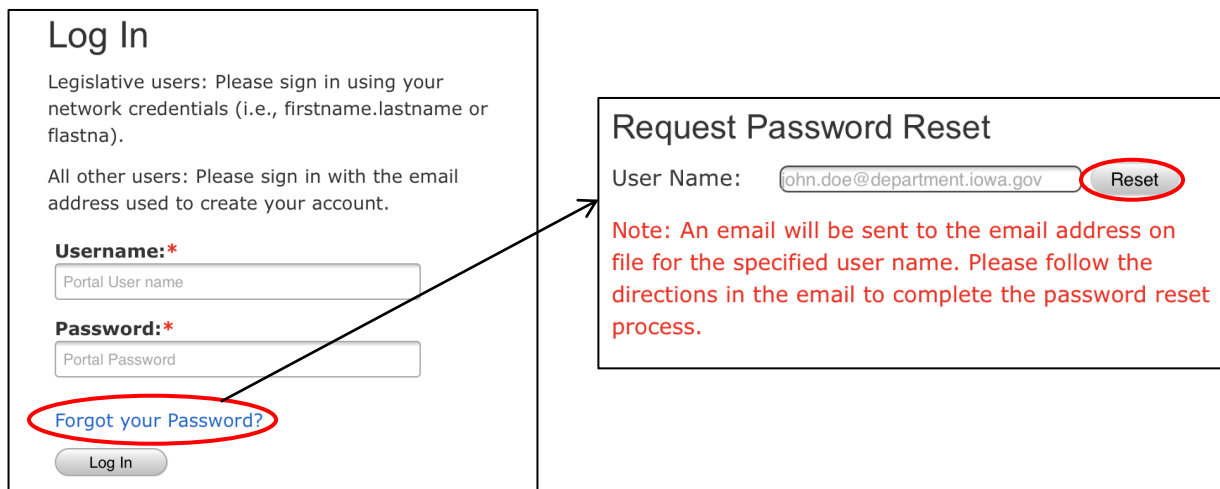
Client Reports

The purpose of this report is to document the total amount paid by a client to lobby both the Legislative and Executive branches of Iowa state government. Client reports may be filed by a lobbyist on behalf of a client but are the responsibility of the Client/Client Contact. Support Staff cannot file client reports.

Contact Caroline Warmuth at 515.281.5308 or Caroline.Warmuth@legis.iowa.gov or Charlie Smithson directly at Charlie.Smithson@legis.iowa.gov for the Senate. For the House, contact Meghan Nelson directly at Meghan.Nelson@legis.iowa.gov for guidance with filings.

To Log in to the Lobbyist System:

Go to the legislative website (www.legis.iowa.gov) and click the **Applications** link at the bottom of the page to navigate to the log in screen. (See below)



Log In

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

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

Request Password Reset

User Name: john.doe@department.iowa.gov **Reset**

Note: An email will be sent to the email address on file for the specified user name. Please follow the directions in the email to complete the password reset process.

Users will sign in using their email address as their Username. Enter your username, password, and then click the **Log In** button to sign into the Lobbyist System.

***NOTE:** If you forget your password, click the “Forgot your Password?” link provided on the sign in page. (Circled in red in the left image above.) On the screen that appears, enter your email address into the text box and click the **Reset** button. (Circled in red in the right image above.) An email will be sent to the address you entered with instructions on resetting your password.

****Client Reports can now be submitted at any time throughout the year, there will no longer be an opening date for client reporting in the system. Client Reports will still need to cover the same period; this year, that is 7/1/23- 6/30/24. Reports will still be due each year on July 31 for the previous fiscal year. If you remove a client from your account in the middle of a Fiscal year, you will be given an opportunity to file the client report at the time of client removal.**

*** If you are lobbying as a matter of personal interest, when you add the personal interest client, check the box next to "Personal Interest" (circled in red below). The system will then automatically file a client report for you on July 1 as \$0.00. This report is amendable, if needed.

Edit Client Information

Client:*

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

Address:*

City:*

State:*

Zip:*

Phone:

Personal Interest


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

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

Client Reports

Click on the **Client Reports** link on the left. The page that appears shows the list of client reports that have been filed for the current year. This page will be empty until you submit client reports for the current year.

Client Reports (John Doe)

Year: 2022 



- Year: 2022
- Year: 2021
- Year: 2020
- Year: 2019
- Year: 2018
- ...

[Public Client Reports](#) - Displays public facing client reports filed during year.

This page shows the list of client reports filed for the chosen year.

Please enter a client name below to view the reports filed for that particular client.

Client:

Client	Reporting Period	Date	Filed By	Update
AARP Iowa	07/01/2020 - 06/30/2021	07/16/2021 11:53 AM (Last Modified Date: 07/28/2021 11:56 AM)	System User (Last Modified By: System User)	
Iowa Behavioral Health Association (IBHA)	07/01/2020 - 06/30/2021	07/16/2021 09:02 AM (Last Modified Date: 07/16/2021 09:07 AM)	System User (Last Modified By: System User)	

If you have lobbied in the past and wish to view (but not edit) previously filed client reports, click the arrow (circled in red on the screenshot above) and choose a previous year. The screen will then refresh, and the reports filed for that year will be displayed.

***NOTE:** This will only work for lobbyists that have filed client reports in the past. If this is your first year as a lobbyist, you will not see earlier years in the drop-down.

File a Client Report:

To file a new client report, click the yellow **File Client Report** button in the upper left corner.

File Client Report

If you only represent one client, the client will be selected for you automatically and you will not see a client drop-down.

If you represent more than one client, select a client from the Client drop-down provided to file a client report for that client. (You will see a screen like the one below.)

File Client Report (John Doe)

The purpose of this report is to document the total amount paid by a client to lobby both the legislative and executive branches of Iowa state government. If you have questions on how to properly file a Client Report, please contact the Lobbyist Clerk.

Please select at least one client from the drop down to file client reports.

Client:

▼
 ▲ own.
2018
AARP Iowa
Campbell/Patterson Consulting LLP
Iowa Association of Area Agencies on Aging
Iowa Association of County Conservation Boards
Iowa Association of Rural Health Clinics

After selecting a client, the screen will refresh and will fill in the address and phone of the chosen client, any contacts associated with the client, the date the client was added or removed for the lobbyist and the reporting period start and end dates. It will also put your name in the “Client Representative Name” field.

You must fill in the **Client Representative Title** field. If you are a lobbyist that represents the client, type "Lobbyist" into the Client Representative Title field. See area outlined in red below:

File Client Report (John Doe)

The purpose of this report is to document the total amount paid by a client to lobby both the legislative and executive branches of Iowa state government. If you have questions on how to properly file a Client Report, please contact the Lobbyist Clerk.

Please select at least one client from the drop down to file client reports.

Client: ▼
Clients added between 07/01/2016 - 06/30/2017 are shown.

Address|Phone: 600 E Court Ave., Ste 100
Des Moines, IA 50309

Contact 1:

Contact 2:

Client Added on: 12/01/2021 11:48 AM

Client Removed on:

Reporting Period: 2023 (07/01/2022 - 06/30/2023)

Filed By

Client Representative Name:




Client Representative Title:










+ Click to add a new Item

Lobbyist Name(s) ?	Salaries, Fees, and Retainers ?	Reimbursements ?	Total Paid ?	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	✗
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	✗
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	✗

By checking this box I affirm that the information submitted is true and accurate. Click the "Submit" button to file the Client report.

***NOTE:** If any of the client information is incorrect (address, phone, or contact(s)), click the **Edit Account** link on the left. In the **Client Information** section, click on the linked name of the client whose information you wish to change, make the changes in the window that appears and then click **Save**. Click the **Client Reports** link at left and then click the **File Client Report** link to start the process again.





- Using the rows in the table provided, list each lobbyist that represents the selected client. Some clients may have several lobbyists. Some may only have one.
- If you have questions regarding what to enter in each field in the table, hover over the  next to each column heading for an explanation. (Circled in red below)
- Enter the amount(s) for salaries, fees, and retainers and reimbursements for each lobbyist. The amount in the Total Paid column should be the sum of expenses for each lobbyist.
- If you wish to add another row to the table, click the  icon in front of “Click to add a new Item” at the top right corner of the table. (Outlined in orange below)
- If you wish to remove a row from the table, click the  in the Action column. (Outlined in green below)


 Click to add a new Item				
Lobbyist Name(s) 	Salaries, Fees, and Retainers 	Reimbursements 	Total Paid 	Action 
John Doe	20,000	1,000	21,000	
				
				

- When all expenditure information is entered, check the box to affirm that the information submitted is true and accurate and then click the **Submit** button to file the client report. *You will only be able to click the **Submit** button after you check the box.* See below:

By checking this box I affirm that the information submitted is true and accurate. Click the "Submit" button to file the Client report.

After clicking **Submit**, the page will refresh, and you will be returned to the main Client Reports page. The newly submitted report will be added to the table of Client Reports filed. (Outlined in red below)

Client	Reporting Period	Date	Filed By	Update
Polk County - Board of Supervisors	07/01/2021 - 06/30/2022	08/01/2022 07:34 AM		
AARP Iowa	07/01/2021 - 06/30/2022	07/26/2022 10:23 AM		

You may click the  icon in the **Update** column to update or view the report contents at any time during the current reporting period. Only the most recently submitted Client Report will be displayed on the legislative website.

*NOTE: An internal record of the original client report with a date and time stamp is kept in the system for reference. Amended reports will be labeled as such, with the date, time and person who amended them noted.

If you still have questions about filling out the client report, contact the **Lobbyist Clerk**. (Contact information for the Lobbyist Clerk can be found on [Page 1](#) of this document and on the Lobbyist Information tab on the legislative website.)

View Client Reports:

To view all submitted Client Reports, go to our website (www.legis.iowa.gov), click on the **Lobbyist Information** tab at top and then click the **Client Reports** link.

OR

Click the **Public Client Reports** link on the Client Reports page in the Lobbyist System. See below:

Client Reports (John Doe)

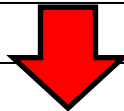
Year: 2022

Public Client Reports - Displays public facing client reports filed during year.

This page shows the list of client reports filed for the chosen year.

Please enter a client name below to view the reports filed for that particular client.

Client:



Client Reports

Lobbyist Client Reports by year.

Year: 2022

Client:

Client	Filing Date	View	PDF
1st Amendment Partnership	[REDACTED]		
3M Company and its affiliates	[REDACTED]		
AARP Iowa	[REDACTED]		

To see Client Reports from a previous year, click the arrow (circled in red on the screen above) and choose a previous year. The screen will then refresh, and the reports filed for that year will be displayed.