

The Iowa Legislature

Fiscal Note Information Guide



June 2015



LEGISLATIVE
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Introduction

The General Assembly requires a Fiscal Note to be attached to any bill or joint resolution that could reasonably have an annual impact of at least \$100,000 or a combined impact of \$500,000 within five years of enactment. The Legislative Services Agency (LSA) reviews each bill and joint resolution for impacts on aggregate revenues, expenditures, or fiscal liability of the State or its subdivisions that may meet the thresholds for a Fiscal Note.

Part I of this document outlines the Fiscal Note process for legislative users, including the Fiscal Note process and how to request a Fiscal Note. Part II is a guide for Departments on preparing and submitting cost estimates to the LSA. Part III provides instructions for LSA analysts using the Fiscal Note program.

Joint Rule 17—Fiscal Notes

A fiscal note shall be attached to any bill or joint resolution which reasonably could have an annual effect of at least one hundred thousand dollars or a combined total effect within five years after enactment of five hundred thousand dollars or more on the aggregate revenues, expenditures, or fiscal liability of the state or its subdivisions. This rule does not apply to appropriation and ways and means measures where the total effect is stated in dollar amounts.

Each fiscal note shall state in dollars the estimated effect of the bill on the revenues, expenditures, and fiscal liability of the state or its subdivisions during the first five years after enactment. The information shall specifically note the fiscal impact for the first two years following enactment and the anticipated impact for the succeeding three years. The fiscal note shall specify the source of the information. Sources of funds for expenditures under the bill shall be stated, including federal funds. If an accurate estimate cannot be made, the fiscal note shall state the best available estimate or shall state that no dollar estimate can be made and state concisely the reason.

The preliminary determination of whether the bill appears to require a fiscal note shall be made by the legal services staff of the legislative services agency. Unless the requestor specifies the request is to be confidential, upon completion of the bill draft, the legal service staff shall immediately send a copy to the fiscal services director for review.

When a committee reports a bill to the floor, the committee shall state in the report whether a fiscal note is or is not required.

The fiscal services director or the director's designee shall review all bills placed on the senate or house calendars to determine whether the bills are subject to this rule.

Additionally, a legislator may request the preparation of a fiscal note by the fiscal services staff for any bill or joint resolution introduced which reasonably could be subject to this rule.

The fiscal services director or the director's designee shall cause to be prepared and shall approve a fiscal note within a reasonable time after receiving a request or determining that a bill is subject to this rule. All fiscal notes approved by the fiscal services director or the director's designee shall be transmitted immediately to the secretary of the senate or the chief clerk of the house, after notifying the sponsor of the bill that a fiscal note has been prepared, for publication in the daily clip sheet. The secretary of the senate or chief clerk of the house shall attach the fiscal note to the bill as soon as it is available.

The fiscal services director may request the cooperation of any state department or agency in preparing a fiscal note.

A revised fiscal note may be requested by a legislator if the fiscal effect of the bill has been changed by adoption of an amendment. However, a request for a revised fiscal note shall not delay action on a bill unless so ordered by the presiding officer of the house in which the bill is under consideration. If a date for adjournment has been set, then a constitutional majority of the house in which the bill is under consideration may waive the fiscal note requirement during the three days prior to the date set for adjournment.

Joint Rules website: <http://www.legis.iowa.gov/DOCS/ChamberRules/JointRules.pdf>

Correctional and Minority Impact Statement – [Code Section 2.56](#)

Fiscal Notes for Administrative Rules – [Code Section 25B.6](#)

Part I – A Guide to the Fiscal Note Process

Part I of this document outlines the Fiscal Note process for Legislative users, including how to request a Fiscal Note.

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Introduction to Fiscal Notes

A Fiscal Note is a clear, concise, nonpartisan analysis of estimated costs and/or revenues produced by actions included in a proposed piece of legislation. The following is an example of a published Fiscal Note.



LSA
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Fiscal Note

Fiscal Services Division



HF 198 – Home and Community-Based Services Staff Training (LSB 1274HV)
Analyst: Jess Benson (Phone: (515) 281-4611) (jess.benson@legis.iowa.gov)
Fiscal Note Version – New
Requested by Representative Mark Costello

Description
House File 198 requires the Department of Human Services (DHS) to adopt administrative rules to allow reasonable staff training costs for Home and Community-Based Services (HCBS) providers to be reimbursable as direct costs. The reimbursement of reasonable costs is to include reimbursement for costs associated with the Learning Management System utilized under the College of Direct Support training program.

Background
The DHS currently reimburses provider training costs as indirect costs that are capped. By changing reimbursement to direct costs, the cap on these expenditures would effectively be removed. The Department is currently contracting with an entity to provide training for HCBS waiver providers, including access to the College of Direct Support.

Assumptions

- Under the current contract for training, the DHS is estimated to spend \$1.1 million each year on training costs in FY 2014 and FY 2015, including:
 - \$308,600 from the General Fund
 - \$308,600 from federal funds
 - \$461,800 from the federal Money Follows the Person rebalancing funds
- Total training costs will be approximately \$1.1 million total dollars for FY 2014 and FY 2015 if reimbursed as a direct cost.
- The current HCBS training contract will be eliminated and training costs will be reimbursed only as a direct cost on the cost report.
- Money Follows the Person funds will no longer be used once training costs are reimbursed as a direct cost.
- The State Federal Medical Assistance Percentage (FMAP) rate is 41.79% for FY 2014 and 42.22% for FY 2015.

Fiscal Impact
Changing the HCBS training cost reimbursement from an indirect cost to a direct cost is estimated to cost the General Fund \$142,000 in FY 2014 and \$147,000 in FY 2015.

Source
Department of Human Services

/s/ Holly M. Lyons
February 14, 2013

The fiscal note for this bill was prepared pursuant to **Joint Rule 17** and the Iowa Code. Data used in developing this fiscal note is available from the Fiscal Services Division of the Legislative Services Agency upon request.

Elements of a Fiscal Note

A Fiscal Note includes the following information:

- Bill Description – a brief summary of the proposed legislation.
- Background – any information the analyst believes is useful in understanding the analysis and the fiscal estimate.
- Assumptions – outlines assumptions used in the analysis. Assumptions may be used to explain differences between estimates received from agencies and the LSA analysis.
- Fiscal Impact – this can include:
 - ✓ The estimated change in State and local costs or revenues produced from the proposed legislation.
 - ✓ At least two years of fiscal impact.
 - ✓ Funds affected by the proposed legislation.
 - ✓ Agencies or departments responsible for the implementation of the proposed legislation.
 - ✓ A list of sources of information as required by [Joint Rule 17](#).

A Fiscal Note falls into two main categories:

- Creating, disbanding, expanding, or contracting a government function (i.e., building a new prison).
- Revenue adjustments.
 - ✓ Fee increases or decreases (i.e., Fish and Game licenses)
 - ✓ Tax increases or decreases (i.e., 10% reduction in income tax rates)

A Fiscal Note can include the following:

- Fiscal impact of legislation – overview of the revenue and expenditures related to the legislation for a minimum of two years.
- Correctional impact of legislation – included for legislation that proposes:
 - ✓ Changes to a law that creates a public offense.
 - ✓ Significant changes to an existing law or the penalty for an existing offense.
 - ✓ Changes to existing sentencing, parole, or probation procedures.
- Minority impact of legislation – includes a summary of the potential effects to minorities of the proposed legislation. Minority persons are defined as women, persons with a disability, African Americans, Latinos, Asians or Pacific Islanders, American Indians, or Alaskan Native Americans.

If an accurate estimate cannot be made, a Fiscal Note shall state the best available estimate or shall state that no dollar estimate can be made and concisely state the reason.

Overview of the Fiscal Note Process

The LSA Fiscal Services Division analyst is notified of a Fiscal Note request:

- The Fiscal Note system emails the LSA analyst when legislation is assigned to them.
- A Legislator can request a Fiscal Note by contacting the Fiscal Services Division Director, a Fiscal Services Analyst or by stopping in at the LSA Main office in the Capitol (Room G01).
- A Legislator or caucus staff can notify an LSA analyst during a meeting related to the legislation or through an informal request such as a phone call or an email.

The LSA analyst gathers information and completes research. This can include:

- Requesting data from a State agency via the Fiscal Note Data Request system.
- Requesting data from other States, groups, website, etc.
- Performing analysis of data already available or historical data.

The LSA analyst determines if a Fiscal Note will be written:

- Reviews information from State agency or other outside information obtained.
- If there is minimal fiscal impact, no Fiscal Note will be written and this will be communicated to the legislator and the legislation will be coded as minimal fiscal impact in the Fiscal Note system.
- A legislator can still request a Fiscal Note be written stating that there is no impact or minimal impact.
- If there is a fiscal impact, the LSA analyst will write a Fiscal Note.
- Memos – Fiscal Notes are not published until legislation has been voted out of a Standing Committee and a House or Senate file number has been assigned. If fiscal information is requested prior to Committee approval, the LSA analyst may write a fiscal memo that includes the majority of the information contained in a Fiscal Note document; however, the document is issued to the requesting legislator only.

Fiscal Notes are reviewed, edited, and published:

- The Fiscal Note Coordinator will maintain the progress of a Fiscal Note document.
- The LSA Production Unit completes the first review of the completed Fiscal Note.
- The Fiscal Services Division Editor and then the Director will review the written Fiscal Note documents after proofing by the LSA Production Unit.
- Fiscal Notes are revised with edits and published to the LSA website under the Fiscal Note document link: <http://www.legis.iowa.gov/LSAReports/fiscalNotes.aspx>
- A paper copy of the Fiscal Note is distributed to the requesting legislator or in some cases, is emailed to the legislator and is transmitted to the Secretary of the Senate or the Chief Clerk of the House for publication in the daily Clip Sheet.

Fiscal Notes are updated for several reasons that include:

- The legislation is amended and the fiscal impact has changed.
 - There is legislation in the other chamber (House or Senate) that may be similar, but has different proposed changes, making the fiscal impact different.
 - Additional information has been received after the Fiscal Note has been issued and the document needs to be revised.
-

Preparing a Fiscal Note

A Fiscal Note falls into two main categories:

- Creating, disbanding, expanding, or contracting a government function (i.e., building a new prison).
 - ✓ The general source of fiscal estimate information will be the impacted State Department or Agency and includes the following:
 - Number of staff involved, average salary, and employee benefit costs
 - Office space
 - Vehicles
 - Other expenses
 - ✓ Offsetting revenue (i.e., will fees be charged to cover the increased expenditures?)
 - ✓ Interest expense
 - ✓ Funding source
 - ✓ Impact of inaction
 - ✓ Timing of impact (i.e., starting mid-fiscal year?)
- Revenue adjustments.
 - ✓ This type of analysis is fairly straight-forward.
 - ✓ If there is a fee change, the relevant agency usually provides the background information.
 - ✓ If there is a tax change, the Department of Revenue usually provides information and analysis, but the information is reviewed by the LSA analyst.
 - ✓ Individual income tax – Iowa income tax micro-simulation model.
 - ✓ Corporate tax – ad hoc analysis based on tax returns.
 - ✓ Sales tax – U.S. Census Bureau Economic Census (every 5 years).
 - ✓ Gas tax – Departments of Transportation and Revenue.
 - ✓ If there is a business-related tax credit change – the Department of Economic Development often provides background information.
 - ✓ Timing of impacts.
 - ✓ Fiscal Notes do not include analysis related to secondary impacts such as economic multipliers, indirect or induced effects, impact on related business-assistance programs, or the probability adjustment for the actual impact of the revenue law change.

A Fiscal Note document can also include a Correctional Impact Statement. A Correctional Impact Statement analyzes legislation that creates a new crime or changes an existing crime and/or penalty. This includes:

- Changes a law that creates a public offense.
- Significantly changes an existing law or the penalty for an existing offense.
- Changes existing sentencing, parole, or probation procedures.

In addition, a Minority Impact Statement will be included with a Correctional Impact Statement. This includes a summary of the potential effects to minorities for proposed legislation and includes:

- Projects the racial composition of offenders convicted of the particular criminal offense.
- Changes in the criminal sentence length by race for persons receiving correctional supervision.
- Minority persons are defined as women, persons with a disability, African Americans, Latinos, Asians or Pacific Islanders, American Indians, or Alaskan Native Americans.

A Correctional Impact Statement that does not have a correctional impact will not have a minority impact. Information for the Correctional Impact Statement or Minority Impact Statement is available at the Justice System Appropriations Subcommittee documents website. This information is updated annually and published to the website at the beginning of the calendar year prior to the Legislative Session. Refer to Appendix B for examples.

Requesting a Fiscal Note

The Legal Services Division staff makes the preliminary determination of whether legislation will require a Fiscal Note.

- The Fiscal Note system assigns Fiscal Notes by subject codes assigned to Fiscal Services Division staff.
- The fiscal analyst can accept or reject the Fiscal Note assigned to them.
- If accepted, the fiscal analyst will request or obtain information using a data request (refer to Part III – Requesting Fiscal Note Information).
- If rejected, the legislation will be assigned to another fiscal analyst.

Unless the bill requestor specifies that the legislation is to be confidential, the Legal Services Division staff will send a copy of the completed legislation to the Fiscal Services analyst.

When a committee reports a bill to the floor, the committee shall state in the report whether a Fiscal Note is or is not required.

A Legislator may request a Fiscal Note for any bill or joint resolution which reasonably could be subject to Joint Rule 17. Fiscal Notes are not attached to simple or concurrent resolutions. To request a Fiscal Note:

- A Legislator can request a Fiscal Note by contacting the Fiscal Services Division Director, a Fiscal Services Analyst or by stopping in at the LSA Main office in the Capitol (Room G01).
- A Legislator or caucus staff can notify an LSA analyst during a meeting related to the legislation or through an informal request such as a phone call or an email.

The Fiscal Analyst should make a notation in the Fiscal Note run related to the requestor:

The screenshot displays the Fiscal Note system interface. The top navigation bar includes options like Home, Preferences, Bill, Fiscal Note, Data Request, Rev Track, Compare, Find A Bill, and Reports. The main area is divided into several sections:

- Fiscal Notes:** A sidebar on the left showing 'Bill Assignment History' with entries for 'Assigned' and 'Accepted' by Broich, Adam on 01/08/2011.
- Bill List:** A central table with filters and a list of bills. The filters include GA Session (86.1 (2015)), LSB No. (1782), and Status (Assigned). The table has columns for LSB No., GA, Session, On Calendar, Bill Title, Subject, Assigned To, Status, Status Date, and RevTrack. One row is highlighted in blue.
- Fiscal Note Detail:** A section on the left showing draft information for a bill, including Drafter, Bill Requester (Transportation (Senate)), FN Requester, Version (Draft), and PE. Doc. (No).
- Bottom Section:** A 'Fiscal Notes' section with tabs for Fiscal Notes, Bill Tracking and History, and Documents. A table below shows a list of bills with a 'Comments' column highlighted in red, containing the text 'Test'.

The fiscal impact of legislation is often discussed during subcommittee meetings or committee meetings. Per Joint Rule 17, the minimum fiscal impact for issuing a Fiscal Note is \$100,000 per year of \$500,000 over five years, however, legislation with a fiscal impact below this amount may be requested.

The fiscal analyst can provide the information in one of the following ways:

- Directly to the requestor using verbal communication, email, or telephone.
- Directly to the requestor using a written Fiscal Memo document.
- Providing information received from an outside source (such as Department estimates).

Joint Rule 17 does not apply to appropriation and ways and means bills where the total effect is stated in dollar amounts.

Fiscal note estimates exclude costs caused by inflation so that the fiscal implications resulting from proposed legislation can be more accurately identified. Agency estimates only include direct impacts—secondary impacts related to the economy are not included.

Frequently Asked Questions

Who can request a Fiscal Note?

All bills placed on the Senate or House calendar are reviewed by the Fiscal Services Division to determine if a Fiscal Note is needed. Additionally, a legislator may request the preparation of a Fiscal Note for any bill or joint resolution that could reasonably meet the thresholds for a Fiscal Note.

If a bill does not appropriate funds, why is there an impact?

Fiscal Notes provide both expenditure and revenue estimates associated with a bill and reflect the full cost of a bill regardless of whether funds are being appropriated. Bills that limit expenditures to the funding appropriated also do not eliminate costs that are reflected in a Fiscal Note because the Fiscal Note provides an estimate for full implementation of the bill. Bills that do have a fiscal impact may be funded through an appropriations bill.

Is there an impact if a bill authorizes but does not require a program to be implemented?

For the purposes of a Fiscal Note, the LSA makes the assumption that the authorized program will be implemented. The LSA reviews all possible costs to State government and its political subdivisions in writing a Fiscal Note.

If an agency resubmits information regarding bills, is the LSA obligated to use the latest information?

The LSA uses most accurate and reliable information whenever that information is received. If new information is submitted that varies greatly from the original estimates, the information the LSA believes is the most accurate will be used. In some cases the LSA will issue a revised Fiscal Note based on data submitted after the initial issuance. The LSA is not obligated to use any data provided by the Department and seeks multiple and independent sources of financial information.

Do Fiscal Notes reflect the impact only to State government or to Iowa as a whole?

Fiscal Notes only reflect revenue, expenditure, and other impacts a bill has on State government and political subdivisions when information is available.

Do Fiscal Notes reflect costs to State funds only, or do they reflect costs related to the Iowa economy?

A Fiscal Notes only addresses the direct effect of revenues and expenditures to State government. Secondary impacts related to the legislation, such as job impacts or unemployment rates, are not included in Fiscal Note estimates.

How do Fiscal Notes and appropriations bills work together?

A Fiscal Note provides the estimate of the potential costs of a bill and is used as a tool for the Appropriations Committee when determining the budgets for each Department if the bill is enacted or is presumed to be enacted. The General Assembly is not bound by Fiscal Notes when appropriating funds and can appropriate at whatever level is deemed appropriate.

What is the process for distributing Fiscal Notes?

Fiscal Notes are reviewed and approved by the Fiscal Services Division Director and then filed with the Chief Clerk of the House or the Secretary of the Senate. If time does not permit publication in the clip sheets, paper copies of the Fiscal Note are distributed to legislators. Typically, Fiscal Notes are published in the Clip Sheets (paper copy) and on the website.

What is the baseline for preparing Fiscal Note estimates?

Fiscal Note estimates are based on laws in effect at the time the Fiscal Note is written and the Revenue Estimating Committee (REC) estimate made in December. The Fiscal Note estimates assume that no changes will be made to law other than those resulting from the bill's implementation. They further assume that the REC estimate will remain unchanged.

For example, if a sales tax exemption for certain businesses were set to expire during the upcoming biennium, the REC for the upcoming biennium would include the additional sales tax revenue that would result from the expiration of the tax exemption. If a bill were to extend the sales tax exemption, sales tax revenue would be less than the amount included in the REC. Therefore, even though the bill would allow taxpayers to continue to receive the same tax exemption, the baseline for the fiscal note estimate is the revenue that would have been collected if the bill's provision were not implemented. Thus, the fiscal note estimates in the example would include a revenue loss.

If a bill does not appropriate funds, why is there an impact?

Fiscal Notes provide cost and revenue information. The House or Senate Appropriations Committee determines how much of the costs detailed in the Fiscal Note will be funded. Legislation that does not appropriate money for implementation does not prevent the fiscal note from reflecting the full cost associated with the bill. The estimated cost of a program is distinct from the amount appropriated through the legislative process and the Fiscal Note does not limit the appropriations process.

Is there an impact if a bill authorizes, but does not require, a program to be implemented?

A bill may include language that states that a program “may be implemented” instead of “shall be implemented.” The Fiscal Services Division treats both versions of the bill in the same manner for the following reasons:

- The Fiscal Note provides the Legislature with information regarding the potential costs of the proposed legislation.
- The Fiscal Note provides a specific dollar amount that the Legislature can use when deciding on how much, if any, to fund the program in the appropriations process.

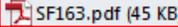
Part II – Instructions for Departments

Part II is a guide for Departments on preparing and submitting cost estimates to the LSA.

Department General Information

The Department Fiscal Note Coordinator receives an email stating there is a Fiscal Note Data Request. The email has a copy of a blank Fiscal Note or Correctional Impact form and a copy of the Bill. This email can be forwarded with these documents to the appropriate person in the Department. There is also a link to the Fiscal Note Data Request website that manages the Fiscal Note Data Requests.

From: emily.kramer@legis.iowa.gov ← Email address of drafter requesting Fiscal Note.
To: webmaster
Cc:
Subject: Fiscal Note Data Request for LSB 1043XS [SF163]

Message  

The Legislative Service Agency has been asked to prepare a fiscal note for the bill LSB 1043XS [SF163]. You can log into the Fiscal Note system at <https://javaweb-test.legis.iowa.gov/portal/fn/datarequest/details?action=edit&requestID=27554> to view the request details. We ask that the attached worksheet(s) for this request be completed and submitted back to us by **06/24/2015**.
Date requested for submission.

If you have questions or comments, please call me, Emily Kramer at (515)281-3155 for more information.
Contact information of drafter requesting Fiscal Note.

cc. Stephen Larson Stephanie Strauss ← These are the people the email was sent to and the people that have rights to use the Fiscal Note portion of the system. If you need to change the people who have access, contact the LSA Front Office.

Click on the link to login to the Fiscal Note system.

Please do not reply to this email as this email account is not monitored.

Click on the PDF attachment for the full text of the bill. 

Click on the Excel document (.xls file) to open the file to complete. 
This will be the sheet that you will complete, save, and upload to the portal.

Complete and save the worksheet.

Fiscal Note website login — you must login to submit fiscal note information.

Click the link in the email (on previous page) to login to the Fiscal Note system.

You can sign in anytime by clicking the **Applications** link at the bottom of the legislative website homepage (<http://www.legis.iowa.gov>).

Use your email address as your user name.

When you were entered into the system as the liaison for the Fiscal Notes portion, you should have received an email asking you to set up your system password.

The email you receive will look like the one below:

Clicking the link will take you to this page:

The screenshot shows the Iowa Legislature website's password reset page. At the top, there is a navigation bar with the following links: SENATE/HOUSE, LEGISLATORS, LEGISLATION, COMMITTEES, IOWA LAW & RULES, LEGISLATIVE AGENCIES, PUBLICATIONS, RESOURCES & CIVIC EDUCATION, LOBBYIST INFORMATION, and ARCHIVES. Below the navigation bar, the page title is "The Iowa Legislature > Reset Password Request". The main content area has a "Reset Password" button and a "Request Password Reset" section. The "User Name:" field contains "john.doe@department.iowa.gov" and a "Reset" button is next to it. A red note below the form states: "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."

Enter your email address and click the **Reset** button.

The screen indicates an email will be sent to the address on file (entered) for the specified user name. Follow the directions in the email to complete the password reset process. This is the same email you originally received with new links (see previous page).

Click the first link in the email to continue creating/resetting your password. After clicking the link, you will be taken to the screen below:

The screenshot shows the Iowa Legislature website's change password page. The title is "Change Password". Below the title, there are two paragraphs of instructions: "Your new password can contain any character that can be input from the keyboard, including the 'upper' case of those keys." and "Your new password must be a minimum of 8 in length and contain 3 of the following 4 items, a lower case letter, a upper case letter, a number and a symbol/punctuation mark." Below the instructions, there are two input fields: "New password:" and "Confirm New Password:". A "Reset" button is located below the "Confirm New Password:" field. To the right of the input fields, there is a list of password criteria: "Minimum of 8 in length.", "Contains a lower case letter.", "Contains a upper case letter.", "Contains a number", and "Contains a symbol". A blue callout box on the right side of the page contains the text: "This is the password criteria. As each criterion is met, it will turn green. Make sure you meet the criteria and the passwords match."

Enter your desired password, confirm the password and then click the **Reset** button.

The screen will indicate that you have successfully changed your password. Return to the Fiscal Note system and login using your new password here: <https://www.legis.iowa.gov/portal>.

The screenshot shows the Iowa Legislature website's external applications page. On the left side, there is a sidebar with the title "External Applications" and three links: "Webmail", "Citrix", and "Mobile BB". The main content area has the following text: "Legislative Users: Please sign in using your network credentials. (firstname.lastname or flastna)" and "All Other Users: Please sign in using the email address you signed up with." Below this text, there are two input fields: "Username:" containing "john.doe@iowa.gov" and "Password:" with a masked password. A "Sign In" button is located below the password field. At the bottom of the page, there is a paragraph of text: "If you have problems or questions signing in, please contact the Help Desk at (515)281-6506."

Submitting a Fiscal Note Data Request

Once you are signed in, click the **Fiscal Notes** link along the left-hand side of your screen to begin.

- New – a request that has not been accepted by the Fiscal Note Coordinator.
- In Process – a request that has been accepted, but not yet completed.
- Closed – a completed request.
- All – a listing of all requests sent to the Fiscal Note Coordinator.

The Fiscal Note Data requests can be sorted by clicking on each of the column headers. (See outlined area in picture below.)

The Iowa Legislature > Legislative Portal > Fiscal Notes > Fiscal Notes Data Request **Department:** Alcoholic Beverages Division

Fiscal Notes Data Request

General Assembly: 86 (01/12/2015 - 01/08/2017)

Filter By: All

Bill	Bill Title	LSB #	LSB Code	Date Requested	Due Date	Status	Actions
SF 163	Healthcare Corporate Police	1043	XS	06/17/2015	06/24/2015	New	Details
HF 192	Property Tax Assessment Notices and Protests	1113	HV	03/05/2015	03/12/2015	Closed	Details
SF 396	Fuel Pumps, American with Disabilities Act Compliant	1864	SV	03/05/2015	03/12/2015	New	Details
HF 408	Alcohol Tax Increase	2280	YH	03/02/2015	03/07/2015	In Process	Details
HF 402	Wine Sampling at Special Events	2099	YH	02/27/2015	03/06/2015	In Process	Details
HF 358	Beer Sales, Growlers	2338	YH	02/20/2015	02/27/2015	In Process	Details

By default, the system will show all requests. To view only “New” requests, the Coordinator must change the filter to “Waiting” by clicking on the arrow to reveal the drop-down menu. (See below.)

Fiscal Notes Data Request

General Assembly: 86 (01/12/2015 - 01/08/2017)

Filter By: All

Bill	LSB #	LSB Code
------	-------	----------

The following example has two new requests. To get additional information, the Coordinator must click on the “Details” link.

The Iowa Legislature > Legislative Portal > Fiscal Notes > Fiscal Notes Data Request Department: Alcoholic Beverages Division

Fiscal Notes Data Request

General Assembly: 86 (01/12/2015 - 01/08/2017)

Filter By: Waiting

Bill	Bill Title	LSB #	LSB Code	Date Requested	Due Date	Status	Actions
SF 163	Healthcare Corporate Police	1043	XS	06/17/2015	06/24/2015	New	Details
SF 396	Fuel Pumps, American with Disabilities Act Compliant	1864	SV	03/05/2015	03/12/2015	New	Details

If a data request is new (see Status column), you can click on the **Details** link (see above) to see the information that was entered. You will see a page like the one below.

Home > Legislative Portal > Fiscal Notes > Fiscal Notes Data Request > Fiscal Notes Data Request Details Department: Human Rights, Department of

Fiscal Notes Data Request Details

Status: New

Bill: SF 51

Bill Title: Sex Offender Placement in Elder Care Facilities

LSB #: 1370

LSB Code: YH

Date Requested: 01/18/2013

Due Date: 01/25/2013

Analyst: Dwayne Ferguson

Fiscal Note Template: (515) 281-6561

Submitted Files: FN_Doc308

Fiscal Note Published:

Files: Choose File No file chosen

Check the box below if you have determined that this legislation will have no fiscal impact

No Fiscal Impact

Important: Once you have submitted this information, you will no longer be able to make changes to this file

Confirm Changes

Fiscal analyst may email documents related to the Fiscal Note request. If so, the file names would appear as a link next to “Submitted Files”.

You can click the **bill link** to be taken to the full text of the bill in BillBook. Click the **analyst email address link** to open up a new email message with the analyst’s name in the “To” field.

If there is no fiscal impact for the specified legislation, simply click the check box in front of “No Fiscal Impact” and then hit the **Submit** button.

If there is fiscal impact, click the **Fiscal Note Template** link to pull up the spreadsheet in Excel. Fill in the spreadsheet and save the completed copy to your computer.

Click the **Choose File** button, navigate to the revised Fiscal Note Template that you saved, select it by clicking on the file and then hit the **Open** button. This will upload the revised template.

If you are satisfied that all the information is correct, click the check box in front of “Confirm Changes” and then click the **Submit** button.

***NOTE:** Once the Coordinator submits the fiscal information, they will be unable to make any changes in the system. At that point, changes must be communicated to the analyst.

They have now successfully submitted the Fiscal Note Data Request.

Responses include:

No Fiscal Impact – When there is no fiscal impact, the Department Coordinator can click on the “No Fiscal Impact” box, “Confirm Changes” box and then click on the “Save” box. This request is now complete and the system will code the request “Completed”.

Fiscal Impact – If there is a fiscal impact, the Department Coordinator must click on the “Choose File” box to find the file and click on “Open” to attach the completed Fiscal Note data request. The Fiscal Note Coordinator will click on the “Confirm Changes” box and then click on the “Save” box to submit the information.

After clicking on the “Save” box, an email is sent to the Fiscal Analyst that information has been submitted by the Department. The Status of the request is changed from “New” to “In Process” in the system.

After the information has been submitted, the LSA fiscal analyst will write a Fiscal Note and have it published. The LSA fiscal analyst will change the status of the Fiscal Note Data Request to “Closed”. The Department Coordinator can log into the Fiscal Note Data Request system and view a copy of the published Fiscal Note.

Fiscal Note Data Request Information

Once a data request is submitted by the Department Fiscal Note Coordinator, the data request cannot be changed. If the Department needs to update the data, the Fiscal Analyst should be notified by an email that new information is available. The Fiscal Analyst can email a new Fiscal Note Data Request, and the process can start over.

Part III – Instructions for LSA Fiscal Analysts

Part III provides instructions for LSA fiscal analysts using the Fiscal Note program.

Requesting Fiscal Note Information

An email is received that there is a new Fiscal Note. For this example, LSB 2306 is being used.

The screenshot displays the LINC Dashboard (TEST) interface for user Adam Broich. The main window shows the 'Bill List' section with a table of bills. A right-click context menu is open over the row for LSB 2306, highlighting the 'Create a Data Request' option. The table data is as follows:

LSB No.	GA	Session	On Calendar	Bill Title	Subject	Assigned...	Status	Status D...	RevTrack
2306	86	1		Antique Car ...	Transporta...	Broich, Adam	Accepted	02/26/201...	
2326	86	1		Bicycle Lights	Transporta...	Broich, Adam	New Fiscal ...	02/17/201...	
1881	86	1		Disabled Vete...	Transporta...	Broich, Adam	Accepted	02/11/201...	
1334	86	1		DOT Winter ...	Transporta...	Broich, Adam	New Fiscal ...	01/08/201...	
1986	86	1		Dump Truck Li...	Transporta...	Broich, Adam	Accepted	02/11/201...	
1672	86	1		Emergency V...	Transporta...	Broich, Adam	Accepted	01/16/201...	
1841	86	1		Motor Vehicle...	Transporta...	Broich, Adam	Accepted	02/11/201...	
1641	86	1		Motor Vehicle...	Transporta...	Broich, Adam	Accepted	01/21/201...	
2374	86	1		Motor Vehicle...	Transporta...	Broich, Adam	Accepted	02/25/201...	
1757	86	1		Motor Vehicle...	Transporta...	Broich, Adam	Accepted	01/28/201...	

The 'Available Actions' menu is open over the row for LSB 2306, showing the following options:

- Set Status
- New Fiscal Note
- Edit Fiscal Note Information
- DELETE Fiscal Note
- Create New Fiscal Note Document
- View Bill
- Create New Fiscal Revision
- Create a Data Request** (highlighted with a red box)
- Revenue Tracking
- DELETE Revenue Tracking

A callout box with an arrow points to the row for LSB 2306 with the text "Right click here".

Right click on the lower portion of the screen to get the popup menu and click on "Create a Data Request".

The following screen will appear; make any changes needed.

Data Request For: **LSB 1043XS [SF163]** Click to view bill View Bill Text

Choose the Department from the drop-down menu. The liaisons for that department will fill in for you.

Organizations with Fiscal Note Portal Access: Alcoholic Beverages Division

Data request will be sent to these contacts below:

Valid Email Email not valid. Can not send a request to this contact

Contact Name	Email
Larson, Stephen	larson@iowaabd.com
Strauss, Stephanie	strauss@iowaabd.com

Include myself as a BCC.

Check the box to receive a copy of the email.

Additional comments to add to the email

Type any additional comments here. If you wish to add these comments to the email message you are sending, click the "View Comments in Email" button below.

View Comments In Email

Email to be sent out:

The Legislative Service Agency has been asked to prepare a fiscal note for the bill LSB 1043XS [SF163]. You can log into the Fiscal Note system at <https://javaweb-test.legis.iowa.gov/portal/fn/datarequest/details?action=edit&requestID=999999> to view the request details. We ask that the attached worksheet(s) for this request be completed and submitted back to us by 06/24/2015.

If you have questions or comments, please call me, **Emily Kramer at (515)281-3155 for more information.**

The deadline for submission of the Fiscal Note and your contact information will fill in automatically for you.

Upload any additional comments by clicking this button.

Attachments

The Bill

Standard fiscal note form (FN_Doc.xls)

Correctional impact form (CI_Doc.xls)

Add Additional Attachments

Delete Additional Attachment

Cancel Request(s)

Send Email(s)

Check the box for either the Standard fiscal note form (selected by default) or the Correctional impact form.

When you have finished, click the "Send Email(s)" button to send the request to the department chosen.

After sending the email, you will see the status has changed to “Requested Electronically”. (See below)

Bill List     My Bills My Outstanding Newly Submitted Data Requests Bills With RevTrack 

Filters (click to hide) Filter Sets: All

GA Session: Equals 86.1 (2015) All Fields: Contains LSB No.: Equals 1782 Assigned To: Contains broic Status: Contains

	LSB No.	GA	Session	On Calendar	Bill Title	Subject	Assigned...	Status	Status D...	RevTrack
	2306	86	1		Antique Car ...	Transporta...	Broich, Adam	Accepted	02/26/201...	
	2326	86	1		Bicycle Lights	Transporta...	Broich, Adam	New Fiscal ...	02/17/201...	
	1881	86	1		Disabled Vete...	Transporta...	Broich, Adam	Accepted	02/11/201...	
	1334	86	1		DOT Winter ...	Transporta...	Broich, Adam	New Fiscal ...	01/08/201...	
	1986	86	1		Dump Truck Li...	Transporta...	Broich, Adam	Accepted	02/11/201...	
	1672	86	1		Emergency V...	Transporta...	Broich, Adam	Accepted	01/16/201...	
	1841	86	1		Motor Vehide...	Transporta...	Broich, Adam	Accepted	02/11/201...	
	1641	86	1		Motor Vehide...	Transporta...	Broich, Adam	Accepted	01/21/201...	
	2374	86	1		Motor Vehide...	Transporta...	Broich, Adam	Accepted	02/25/201...	
	1757	86	1		Motor Vehide...	Transporta...	Broich, Adam	Accepted	01/28/201...	

print export: XLS XLSX Items (95)

Fiscal Notes 

Fiscal Notes Bill Tracking and History Documents

	LSB	Amend	Bill N...	Status	On ...	Drafter	Req...	Fisc...	Correc...	State...	Legisla...	Com...	Bill Ver	Doc...	Rev ...
	SS			In Pro...									Draft		
	SS		SF326	In Pro...									Introd...		

Data Requests 

Organization	Status	Date Requested	Due Date	Submitted When	Submitted By
Department of Transpor...	Requested Electronically	02/26/2015	03/05/2015		
Criminal and Juvenile Ju...	Closed	02/26/2015	03/05/2015	02/27/2015	Sarah Johnson

The LSA fiscal analyst can obtain information for a Fiscal Note from any of the following, but the majority will be emailed to the State Departments.

State Departments and Agencies	Other states
National Conference of State Legislatures	National Associations
League of Cities	Iowa Association of Counties
Lobbyists or interest groups	Other divisions of government
State library	Federal agencies
Internet	LSA data files
Newspapers	Individual businesses
Prior Fiscal Notes	Other legislative staff
State accounting system	

Closing the Fiscal Note Data Request

The fiscal analyst will receive an email when the Fiscal Note Data Request is completed.

The fiscal analyst will click on the corresponding legislation in the Fiscal Note system. The status of fiscal note will be "Newly Submitted". You can see all newly submitted requests by clicking on the "Newly Submitted Data Requests" button. (See below)

If there is no fiscal impact, simply change the status of the data request to "Closed". Right click on the department name under the Data Requests heading and select "Close This Request". (See below)

The screenshot shows the LINC Dashboard interface. At the top, there are navigation tabs: Home, Preferences, Bill, Fiscal Note, Data Request, Rev Track, Compare, Find A Bill, and Reports. Below these are several tool icons. The main content area is divided into several sections:

- Fiscal Notes:** Includes a 'Bill Assignment History' table with columns for status (Assigned, Accepted), drafter (Broich, Adam), and date (01/08/2015).
- Bill List:** Features a 'Newly Submitted Data Requests' button highlighted with a red box. Below it are filter settings for GA Session, LSB No., and Status.
- Table:** A table with columns: LSB No., GA, Session, On Calendar, Bill Title, Subject, Assigned..., Status, Status D..., and RevTrack. The row for 'DOT Winter ...' is highlighted in blue.
- Fiscal Note Detail:** Shows draft information for a Department of Transportation bill.
- Fiscal Notes (Table):** A table with columns: LSB, Amend, Bill N..., Status, On..., Draf..., Req..., Fisc..., Correc..., State..., Legis..., Com..., Bill..., Document, R... The row for 'DP' is highlighted in blue.
- Data Requests:** A table with columns: Organization, Status, Date Requested, Due Date, Submitted When, and Submitted By. The row for 'Department of Transpor...' is highlighted in blue. A context menu is open over this row, with 'Close This Request' highlighted in red. An arrow points to the menu with the text 'Right click here'.

If there is fiscal note needed, right click on the Bill Number in the Fiscal Notes section to get the pop-up menu below. Choose "Create New Fiscal Note Document".

The screenshot displays the LINC Dashboard (TEST) interface. The top navigation bar includes Home, Preferences, and various tool icons. The main content area is divided into several sections:

- Fiscal Notes:** Contains a Bill Assignment History table and a Fiscal Note Detail section. The detail section shows fields for Drafter, Bill Requester (Department of Transportation), FN Requester, Version (Draft), and PE. Doc (No).
- Bill List:** A table with columns for LSB No., GA, Session, On Calendar, Bill Title, Subject, Assigned..., Status, Status D..., and RevTrack. It includes filter options and a print export button.
- Fiscal Notes (Table):** A table with columns for LSB, Amend, Bill N..., Status, On..., Draf..., Req..., Fisc..., Correc..., State..., Legis..., Com..., Bill..., Document, and R... The row for 'DP.1' is selected, and a context menu is open over it.
- Data Requests:** A table with columns for Organization and Status.
- Document Tracking:** A section at the bottom of the interface.

The context menu for the 'DP.1' row includes the following actions:

- Set Status
- New Fiscal Note
- Edit Fiscal Note Information
- Drafter Information
- DELETE Fiscal Note
- Create New Fiscal Note Document** (highlighted in red)
- Edit Fiscal Note Document
- View Bill
- Create New Fiscal Revision
- Create a Data Request
- Revenue Tracking
- DELETE Revenue Tracking

A callout box with the text "Right click here" and an arrow points to the 'DP.1' row in the Fiscal Notes table.

When you are finished, save the document in Word. It will be added to the Fiscal Note dashboard. You may now close the Word document.

You will look for the document in the **Publishing** tab of the dashboard and select it.

If you need to edit the Fiscal Note document after closing it, find the document in the Fiscal Notes dashboard; right click on the fiscal note (as we did when we created the fiscal note document). This time the choice will be changed to “Edit Fiscal Note Document”.

The screenshot displays the LINC Dashboard (TEST) interface. The top navigation bar includes icons for Bill, Fiscal Note, Data Request, Rev Track, Compare, Find A Bill, and Reports. The main content area is divided into several sections:

- Fiscal Notes:** Includes a 'Bill Assignment History' table with columns for status (Assigned, Accepted), name (Broich, Adam), and date (01/08/2015).
- Fiscal Note Detail:** Shows draft information such as Drafter, Bill Requirer (Transportation (Senate)), FN Requester, Version (Introduced), and PE. Doc (Yes).
- Fiscal Notes (Table):** A table with columns for LSB No., GA, Session, On Calendar, Bill Title, Subject, Assigned..., Status, Status D..., and RevTrack. It lists various transportation-related bills.
- Data Requests (Table):** A table with columns for LSB, Amend, Bill N..., Status, On..., Draf..., Req..., Fisc..., Correc..., State..., Legis..., Com..., Bill..., Document, and R... It shows the status of various bills.
- Document Tracking:** A table showing the progress of documents through stages like Drafting, Editing, and Proofing, with columns for status, name, and date.

A context menu is open over the 'Data Requests' table, with the option 'Edit Fiscal Note Document' highlighted in red. A callout box points to the right-click action on the table row.

This will pop up the **Publishing Workspace**. Once you are satisfied, click the Proofing button to assign the document to proofing.



Amendments and Fiscal Notes

Notes can be written for an amendment to a Fiscal Note that has been published. First open the Fiscal Note system and find the bill being revised. Right click on the row (as on the previous page) and choose “Edit Fiscal Note Document”. This will launch the Publishing Workspace.

To attach an amendment, click the “Click to attach a new file” button. Choose “Add File” and then choose whether to attach a Generic File (Word, Excel, PDF docs) or an Audio File. Your computer directory will open. Select the file that you wish to attach and then click the “Select” button to attach the file.

The screenshot displays the Publishing Workspace interface. At the top, there are navigation tabs for Home and Preferences, and a toolbar with icons for New, Edit, Assign To, Proof, and Publish. The main area is divided into several sections:

- Helpers:** A sidebar on the left containing Document Tracking and Document Properties.
- Document List:** A central table with filter options and a list of documents. The filters include Doc ID (631679), Doc Type (Fiscal Update News Articles), Author 1 (broich), Title (EOS), Assigned To, and Created Date (After 04/19/2015). The document list shows a row for "Transportation Wi..." with details like Doc Type: Fiscal Note, Assigned To: Published, Author1: Broich, Adam, Subject1: Government ..., and Sort Key: 20150204.
- Attached Files:** A table at the bottom showing files attached to the document. A red box highlights the "Add File..." button and the "Generic File" and "Audio File" options.

Type	Title	La	Add File...	Generic File	Comments	Part of Document	Publish to Web	Published?
	631679.docx	MH	Add PE Document	Audio File		<input type="checkbox"/>	<input type="checkbox"/>	false
	Mary edits - d...	MSHIPMA				<input type="checkbox"/>	<input type="checkbox"/>	false

Fiscal Note Memos

Fiscal Note memos can be written prior to issuing a Fiscal Note for several reasons that include:

- The legislation has not passed through a committee and has a House Study Bill number or a Senate Study Bill number.
- Per Joint Rule 17 the minimum fiscal impact for issuing a Fiscal Note is \$100,000 per year or \$500,000 over five years but a legislator may request fiscal information for legislation that would have an impact below the minimum amount.
- There could be several versions of a bill draft and a legislator may want to compare the fiscal impact of each version.

To request a Fiscal Note Memo:

- A Legislator can request a Fiscal Note by contacting the Fiscal Services Division Director, a Fiscal Services Analyst or by stopping in at the LSA Main office in the Capitol (Room G01).
- A Legislator or caucus staff can notify an LSA analyst during a meeting related to the legislation or through an informal request such as a phone call or an email.

To complete a Fiscal Note memo, the fiscal analyst will request the information in the same manner as for a Fiscal Note and do the following:

Right click on the blue line and select “Create New Fiscal Note Document”.

The screenshot displays the 'Fiscal Notes' application window. At the top, there are tabs for 'Fiscal Notes', 'Bill Tracking and History', and 'Documents'. Below these is a table with columns: LSB, Amend, Bill N..., Status, On ..., Draf..., Req..., Fisc..., Correc..., State..., Legis..., Com..., Bill ..., Document, R... The table contains several rows of data, including 'DP', 'SV', and 'SV.1'. A blue horizontal line highlights the row for 'DP.1'. A right-click context menu is open over this line, with the option 'Create New Fiscal Note Document' highlighted in red. A callout box with the text 'Right click here' and an arrow points to the blue line. Below the table is a section titled 'Data Requests' with columns for Organization, Status, Submitted When, and Submitted By.

LSB	Amend	Bill N...	Status	On ...	Draf...	Req...	Fisc...	Correc...	State...	Legisl...	Com...	Bill ...	Document	R...
DP			Handl...					✓			Test	Draft		
DP			New								test			
DP.1			Handl...								Test	Draft		
SV			Handl...									Draft		
SV.2			In i									Intr...		
SV		SF75	Co									Intr...		
SV.1		SF75	Co									Intr...		

The screen below will appear. Choose “Template”, which is selected by default and click on the arrow to pull up the drop-down menu and select “Memo Template”.

LSB Number: 1986 **General Assembly:** 86
LSB Code: SS **Session:** 1
Bill Prefix/Number: **Analyst:** Broich, Adam
Category: Category
Subject: Vehicles
Bill Title: Dump Truck License Plate Placement

Create Document Using

Template Existing Fiscal Note Document

Memo Template
Fiscal Note Template
Memo Template

Select... LSB Number: Bill Number:

Create Document Cancel

Click on the “Create Document” button. The memo template will launch in Word. (See below) Make your edits and save and close the document. The document will be saved in the application for you.

LSA
LEGISLATIVE SERVICES AGENCY
Serving the Iowa Legislature
Glen Dickinson, Director

[Adam BroichName]
[Fiscal Service]
[LSA - Fiscal Services Division]
Des Moines, IA 50319
Phone: [(515) 281-8223]
E-mail: [adam.broich@legis.iowa.gov]

Memorandum

To:
From:
Date:
Re:

Description

Fiscal Impact

Correctional Impact:

Sources

Fiscal Note Publishing and Report Information

After writing a Fiscal Note and sending it to proofing, the fiscal analyst will send an email to the LSA Fiscal Note Coordinator, the Fiscal Services Division Editor, and the Fiscal Services Director that the Fiscal Note is complete. The following steps will be completed for editing and publishing:

- The Fiscal Note Coordinator will complete first edits of the Fiscal Note, make changes, and forward to the Fiscal Division Editor.
- The Fiscal Division Editor will edit the Fiscal Note, make changes and forward to the Fiscal Services Division Director. Major questions or concerns will be communicated to the fiscal analyst prior to publishing.
- After the editing process is complete, the Fiscal Services Division Director will sign the Fiscal Note and the document will be published to the LSA website at: <http://www.legis.iowa.gov/LSAReports/fiscalNotes.aspx>
- Copies of the Fiscal Note are delivered to the appropriate chamber for debate of the legislation.
- Once the Fiscal Note is published, no changes can be made. If a Fiscal Note needs to be revised, the document will be published a second time and noted that it has been revised.

Fiscal Note Reports can be obtained by clicking on any of the button in the Reports section on the ribbon at the top of the application. (See below)



The four report options include:

Counts—Summarizes the number of bills assigned to a fiscal analyst and their status. The following is an example of the Report.

Staff	GA	New	In Process	No Fiscal Note Requ...	No or Little Fiscal Im...	Appropriation...	Duplicate	Not Moving ...	Handled By Other ...	Withdrawn	Co...	Total
Acton, Jennifer	86	10	14	0	46	3	22	41	22	0	5	163
Benson, Jess	86	0	46	0	61	10	4	0	0	0	2	123
Broich, Adam	86	7	72	7	68	1	3	0	41	0	8	207
Crellin, Timothy	86	0	15	0	47	17	0	48	0	0	5	132
Kozel, Debra	86	4	65	2	94	11	1	0	0	0	1	178
Lenstra, Beth	86	0	2	0	60	1	47	54	0	0	18	182
Madison, Robin	86	1	21	2	93	2	17	9	0	1	4	150
Mechler, Christin	86	1	2	0	165	2	0	34	6	2	6	218
Ohms, Kenneth	86	0	37	0	108	1	57	7	4	1	8	223
Parker, John	86	5	13	7	60	1	22	25	45	0	23	201
Reynolds, David	86	0	16	0	14	7	0	9	0	0	4	50
Robinson, Jeffery	86	11	91	0	7	0	20	17	1	0	14	161
Robinson, Ron	86	0	13	15	65	12	11	1	0	0	4	121
Wisner, Alice	86	13	63	5	135	2	15	15	0	0	5	253

Bills in the System—Contains all Fiscal Note information. The following is an example of the Report.

Bills in the System

Filters (click to hide) Filter Sets: Default Add Filter: Select Filter

Assigned To: Contains [] X LSB #: Contains [] X
 Bill #: Contains [] X Status: Contains [] X

LSB #	Bill #	Status	Written	Date Received	Bill Title	Assigned To	DR Out	DR In	Comments	Status Date
1000	draft	No or Little F...	Not Written	Jan 15, 2015	Buying Club ...	Mechler, Christin	0	0		Feb 10, 2015
1000	SSB1037	No or Little F...	Not Written	Jan 15, 2015	Buying Club ...	Mechler, Christin	0	0		Feb 10, 2015
1000	HSB89	No or Little F...	Not Written	Jan 15, 2015	Buying Club ...	Mechler, Christin	3	1		Feb 10, 2015
1000	HF229	No or Little F...	Not Written	Jan 15, 2015	Buying Club ...	Mechler, Christin	0	0		Feb 11, 2015
1002	HF265	Not Moving /...	Not Written	Feb 16, 2015	Involuntary C...	Wisner, Alice	1	0		Mar 4, 2015
1004	SF84	In Process	Not Written	Jan 27, 2015	Jobs for Quali...	Robinson, Ron	1	0		Feb 3, 2015
1007	SF316	Not Moving /...	Not Written	Feb 26, 2015	Weapons Per...	Wisner, Alice	0	0		Mar 4, 2015
1008	HF185	Not Moving /...	Not Written	Feb 9, 2015	Human Traffi...	Lenstra, Beth	1	0		Mar 6, 2015
1010	SF139	Not Moving /...	Not Written	Feb 4, 2015	Smoke Free C...	Reynolds, David	2	1		Mar 5, 2015
1011	SF24	Not Moving /...	Not Written	Jan 13, 2015	Casino Omnibus	Reynolds, David	1	1		Mar 5, 2015
1012	SSB1162	No or Little F...	Not Written	Feb 10, 2015	Guardianship...	Wisner, Alice	0	0		Feb 10, 2015
1012	SF306	No or Little F...	Not Written	Feb 10, 2015	Guardianship...	Wisner, Alice	0	0		Feb 25, 2015
1012	draft	No or Little F...	Not Written	Feb 10, 2015	Guardianship...	Wisner, Alice	0	0		Feb 25, 2015
1014	draft	No or Little F...	Not Written	Jan 8, 2015	Eric Swanson ...	Acton, Jennifer	0	0		Jan 16, 2015
1014	HR3	No or Little F...	Not Written	Jan 8, 2015	Eric Swanson ...	Acton, Jennifer	0	0		Jan 16, 2015
1015	draft	Duplicate	Not Written	Jan 14, 2015	County Seats	Parker, John	0	0		Feb 6, 2015
1015	SF165	No or Little F...	Not Written	Jan 14, 2015	County Seats	Parker, John	0	0	Cannot determin...	Feb 6, 2015
1015	SF26	No or Little F...	Not Written	Jan 14, 2015	County Seats	Parker, John	0	0		Mar 9, 2015
1026	SSB1201	Appropriatio...	Not Written	Feb 18, 2015	Administratio...	Acton, Jennifer	0	0		Mar 9, 2015

print export: XLS XLSX Items (2362)

Regular Calendar—Contains all bills on the Regular Calendar for a given day. The following is an example of the Report.

Bills On The Regular Calendar

Filters (click to hide) Filter Sets: Default Add Filter: Select Filter

Assigned To: Contains [] X LSB #: Contains [] X
 Bill #: Contains [] X Status: Contains [] X

LSB #	Bill #	Status	Written	Date Received	Bill Title	Assigned To	DR Out	DR In	Comments	Status Date
1100	HF6	Completed	Written	Jan 15, 2015	Sexual Exploi...	Lenstra, Beth	8	3	send completed ...	Mar 16, 2015
1147	SF449	No or Little F...	Not Written	Feb 4, 2015	Eminent Dom...	Kozel, Debra	0	0		Mar 13, 2015
1434	HF567	Completed	Written	Feb 17, 2015	Synthetic Drugs	Wisner, Alice	1	0	Minimal Fiscal Im...	Mar 17, 2015
2284	SF394	No or Little F...	Not Written	Feb 16, 2015	Jail Prisoner ...	Lenstra, Beth	0	0	sets priority ord...	Mar 17, 2015
2571	HF534	No or Little F...	Not Written	Feb 26, 2015	Mental Health...	Ohms, Kenneth	0	0	Request \$6K for ...	Mar 26, 2015
2601	SF427	No or Little F...	Not Written	Mar 5, 2015	Firearm Supp...	Wisner, Alice	0	0		Mar 9, 2015

print export: XLS XLSX Items (6)

Daily Debate Calendar—Contains all bills on the Daily Debate Calendar for a given day. The following is an example of the Report.

Bills On The Daily Debate Calendar

Filters (click to hide) Filter Sets: **Default** Add Filter: **Select Filter**

Assigned To: Contains [] LSB #: Contains [] Bill #: Contains [] Status: Contains []

LSB #	Bill #	Status	Written	Date Received	Bill Title	Assigned To	DR Out	DR In	Comments	Status Date
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print export: [XLS](#) [XLSX](#) Items (0)

Appendix A – Definitions

ACT – A bill that has been passed by both the Senate and House, enrolled, certified, approved by the Governor or passed over the Governor’s veto, and published.

ACTS – A book published after each regular session of the General Assembly containing all of the bills and joint resolutions approved during that session. Also known as the session laws.

ADOPTION – Approval or acceptance; usually applied to motions, amendments, and resolutions.

ALLOCATION – State money or personnel appropriated or designated for a function, program, or activity.

AMENDMENT – A change proposed or made to a bill or motion. Amendments may be offered by committees or individual legislators.

APPROPRIATION – State money allocated by the legislature for a specific purpose.

APPROVED BY THE GOVERNOR – Acceptance by the Governor of a bill passed by the General Assembly as indicated by the Governor’s signature on the enrolled bill.

BILL – A legislative proposal sponsored by a legislator or a committee and introduced in the Senate or House. A bill must be approved by both the Senate and House and then by the Governor to become law. Unless introduced as study bills (committee sponsored bills), all bills are designated Senate files or House files, depending on where they originate.

CALENDAR – The daily agenda of legislative business in a chamber.

CALENDAR DAYS – The days listed on a normal seven-day-per-week calendar, as distinguished from legislative days, meaning days when the General Assembly is in session.

CAPITAL APPROPRIATION – An appropriation for long-term additions to, or betterment of, State property, such as land, buildings, or equipment.

CAUCUS STAFF – The employees working for the legislative members of a political party. In each chamber there is a majority party caucus staff and a minority party caucus staff. The caucus staffs help legislators research issues and serve constituents.

CLIP SHEETS – The daily printed compilations of all amendments and Fiscal Notes filed in a chamber the previous day. The amendments are designed to be cut out and placed with the appropriate bills within a paper BillBook. House clip sheets are printed on yellow paper; Senate clip sheets are printed on blue paper.

CODE OF IOWA – The official collection of Iowa’s permanent laws. The Code is published after the completion of the legislative session each even-numbered year.

COMMITTEE – A group of legislators chosen to consider and make recommendations on bills and amendments in a particular subject area.

COMPANION BILL – A House bill identical to one introduced in the Senate (or vice versa).

DEAPPROPRIATION – A decrease in the amount of an appropriation previously enacted for a fiscal year.

DIRECT IMPACT – A Fiscal Note estimate includes an increase or decrease in expenditures or revenue directly related to State government. Examples would include hiring additional staff or increased costs for equipment. A Fiscal Note does not include secondary impacts such as creation of jobs or unemployment rates.

EFFECTIVE DATE – The date a law becomes binding.

FISCAL NOTE – A note prepared and attached to a bill or amendment that states the estimated financial impact of the legislation.

FISCAL YEAR (FY) – The 12-month financial period used for record keeping, budgeting, appropriating, and revenue collecting. Iowa budget fiscal year begins July 1 and ends June 30.

FULL-TIME EQUIVALENT (FTE) – A budgeting and monitoring unit for determining employment numbers that takes into account full-time employee positions, part-time employee positions, vacancy, and turnover factors in a given State department or agency. One FTE position represents 2,080 working hours, the regular number of hours one full-time employee works in a fiscal year.

FUNNEL DATES – The deadlines for legislative action set each session by the Senate and House.

GENERAL ASSEMBLY – The official name of the Iowa Legislature.

GENERAL FUND – The depository for State money not earmarked for specific purposes. The money credited to the General Fund supports the general functions of Iowa government.

ITEM VETO – An action taken by the Governor to prevent enactment of an item in an appropriation bill.

JOINT RESOLUTION – A resolution acted on by both chambers and requiring the approval of a majority of each chamber's members, and, in some cases, the Governor. Joint resolutions may appropriate money, enact temporary laws, propose amendments to the Iowa Constitution, ratify amendments to the U.S. Constitution, or make requests to Congress.

LEGISLATIVE SERVICES AGENCY – A nonpartisan legislative agency that provides bill drafting, legal and fiscal research services, computer services, and assists the General Assembly in the budgeting and appropriations process.

LEGISLATOR – An elected member of the General Assembly, either a Senator or a Representative.

LEGISLATURE – The Senate and House of Representatives collectively. This is the informal name for the General Assembly.

LINE-ITEM – A term used to describe funds requested and/or appropriated on a detailed or itemized basis, such as personal services, travel, equipment, or other items.

LOBBYIST – An individual that encourages the passage, defeat, or modification of proposed legislation.

REPRINTED BILL – A version of a bill that has been amended and passed by a chamber with the amendments incorporated into the bill. Reprinted bills are printed on pink paper.

RESOLUTION – A formal expression of opinion or decision.

REVERSION – Following the close of a fiscal year, all unencumbered or unobligated balances revert to the State treasury and to the credit of the fund from which the appropriation was made.

SECONDARY IMPACT – Fiscal estimates that include reference to economic analysis such as job impacts or unemployment rates will not be included in Fiscal Note estimates.

STATUTE – A permanent or general act approved by the Legislature.

STUDY BILL – A bill developed for committee consideration. Once a study bill is approved by committee, the bill is assigned a Senate file or House file number.

SUBCOMMITTEE – A group of members of a standing committee appointed by the chairperson to study and report on a specified subject or bill.

SUPPLEMENTAL APPROPRIATION – Additional funds appropriated for the current fiscal year that are in addition to the original appropriation.

Source: Legislative Information Office – Room G16, Iowa State Capitol
Iowa General Assembly website: www.legis.iowa.gov

Appendix B – Examples of Forms

Fiscal Note Data Request emailed to Departments and State Agencies—Page 1:

Legislative Services Agency -- Fiscal Services Division FISCAL NOTE WORKSHEET						
FILE: _____ LSB: _____						
PLEASE COMPLETE THE WORKSHEET AND RETURN TO THE LEGISLATIVE SERVICES AGENCY PROJECTIONS SHOULD BE COMPLETED FOR THE NEXT TWO FISCAL YEARS AND BEYOND IF POSSIBLE.						
PART I. ESTIMATED EFFECT ON REVENUE AND/OR EXPENDITURES:						
_____ Check here if no fiscal impact						
	FIRST YEAR (FY)			SECOND YEAR (FY)		
	Estimated Amounts		Est. Inc.	Estimated Amounts		Est. Inc.
	Current Law	Proposed Law	(Decrease)	Current Law	Proposed Law	(Decrease)
A. Revenue by Each Source:						
GENERAL FUND	_____	_____	_____	_____	_____	_____
FEDERAL FUNDS	_____	_____	_____	_____	_____	_____
OTHER (specify) _____	_____	_____	_____	_____	_____	_____
TOTAL REVENUE	_____	_____	_____	_____	_____	_____
B. Expenditures:						
SALARIES	_____	_____	_____	_____	_____	_____
SUPPORT	_____	_____	_____	_____	_____	_____
CAPITAL OUTLAY	_____	_____	_____	_____	_____	_____
OTHER (specify) _____	_____	_____	_____	_____	_____	_____
TOTAL EXPENDITURES	_____	_____	_____	_____	_____	_____
NET EFFECT (A less B)	_____	_____	_____	_____	_____	_____
FTE Positions	_____	_____	_____	_____	_____	_____

Fiscal Note Data Request emailed to Departments and State Agencies—Page 2:

Legislative Services Agency -- Fiscal Services Division FISCAL NOTE WORKSHEET	
PART II.	LIST ALL ASSUMPTIONS USED IN OBTAINING ESTIMATES: (List clearly and in detail).
	Type Here
PART III.	CALCULATION OF ESTIMATES:
	Type Here
PART IV.	EFFECT ON COUNTY OR OTHER LOCAL REVENUE EXPENDITURES:
	Type Here
PART IV.	LONG RANGE EFFECTS OF PROPOSED LEGISLATION:
	Type Here
PART V.	CONFLICTS WITH EXISTING LAW:
	Type Here
If additional explanation is needed, please attach extra pages.	
Agency Representative preparing estimate:	
Name: _____	
Phone Number: _____	
Date: _____	

**Legislative Services Agency, Fiscal Services Division
Correctional Impact Statement/Minority Impact Statement/Fiscal Note Worksheet**

To Criminal and Juvenile Justice Planning Division, Dept. of Human Rights

A correctional impact statement is needed for: File _____ LSB _____

Short Title: _____

The bill or amendment is attached for your review.

Projections should be completed for the next 5 fiscal years (and beyond if possible). The amount of increase in the first fiscal year is the difference between current law and the cost of the new law during the first year. The amount of increase for the subsequent years is the difference for each year under current law and what the cost would be under the new law.

Attach additional pages as needed.

Assumptions:

1. Charge, conviction and sentencing patterns and trends will not change over the projections period (unless otherwise noted in this analysis).
2. Prisoner length of stay, revocation rates and other corrections policies and practices will not change over the projections period (unless otherwise noted in this analysis).
3. The law will become effective July 1, 2010. A lag effect of six months is assumed, from the law's effective date to the date of first entry of affected offenders into the correctional system (to allow for court case processing time).

Increase (Decrease) in the number of convictions:

Type of Crime:	Proposed Law:				
	First Year (FY20XX)	Second Year (FY20XX)	Third Year (FY20XX)	Fourth Year (FY20XX)	Fifth Year (FY20XX)
1 _____	_____	_____	_____	_____	_____
2 _____	_____	_____	_____	_____	_____
3 _____	_____	_____	_____	_____	_____
4 _____	_____	_____	_____	_____	_____
5 _____	_____	_____	_____	_____	_____
Total	=====	=====	=====	=====	=====

Increase (Decrease) for Corrections System:

Prison	Avg. Length of Stay	Proposed Law:				
		First Year (FY20XX)	Second Year (FY20XX)	Third Year (FY20XX)	Fourth Year (FY20XX)	Fifth Year (FY20XX)
Net Admissions	_____	_____	_____	_____	_____	_____
Population Increase (Decrease)	_____	_____	_____	_____	_____	_____

Proposed Law:

Correctional Impact/Minority Impact Data Request emailed to Departments and State Agencies—Page 2:

Community-Based Corrections	Avg. Length of Stay	First Year (FY20XX)	Second Year (FY20XX)	Third Year (FY20XX)	Fourth Year (FY20XX)	Fifth Year (FY20XX)
Facilities:						
Admissions	_____	_____	_____	_____	_____	_____
Probation/Parole						
Admissions	_____	_____	_____	_____	_____	_____
Proposed Law:						
Jails	Avg. Jail Days	First Year (FY20XX)	Second Year (FY20XX)	Third Year (FY20XX)	Fourth Year (FY20XX)	Fifth Year (FY20XX)
Increase (Decrease) in the number of admissions:						
Type of Crime:						
1	_____	_____	_____	_____	_____	_____
2	_____	_____	_____	_____	_____	_____
3	_____	_____	_____	_____	_____	_____
4	_____	_____	_____	_____	_____	_____
5	_____	_____	_____	_____	_____	_____
Total	_____	_____	_____	_____	_____	_____
Will the proposed law have a disproportionate impact on any minority population? _____						
If yes, identify the population: _____						
Proposed Law:						
Minority Impact	Avg. Length of Stay	First Year (FY20XX)	Second Year (FY20XX)	Third Year (FY20XX)	Fourth Year (FY20XX)	Fifth Year (FY20XX)
Increase (Decrease)						
1	_____	_____	_____	_____	_____	_____
2	_____	_____	_____	_____	_____	_____
3	_____	_____	_____	_____	_____	_____
Additional assumptions or comments concerning the effect on capacity and staffing:						

Increase (Decrease) in State and County Revenues:

	Proposed Law:				
	First Year (FY20XX)	Second Year (FY20XX)	Third Year (FY20XX)	Fourth Year (FY20XX)	Fifth Year (FY20XX)
Revenue:					
General Fund					
Victim Compensation Fund					
Counties					
Federal Funds					
Total					

Effect on Programs:

Other comments, including technical or mechanical defects or conflicts with existing law, long-range etc.:

Agency representative preparing estimate:

Name: _____ Phyllis Blood
 Title: _____
 Date: _____ Phone: _____ 281-5942

If additional explanation is needed, please attach extra pages.

Example of Correctional Impact Statement Standard Language:

Usually, there are bills that impose a penalty but the cost is not anticipated to be significant because the offense rarely occurs, or cannot be determined because it is a new offense – there is a lack of information with which to project the correctional or fiscal impact. Here are some standard sentences to use for fiscal notes.

Background

The average State cost for one simple misdemeanor conviction ranges from \$26 (court costs) to \$326 (court costs and indigent defense).

The average State cost for one serious misdemeanor conviction ranges from \$200 (court costs) to \$7,900 (court costs including a jury, indigent defense, prison, and parole). The maximum costs will be incurred across multiple fiscal years while the offender is supervised in the correctional system, either in prison or the community.

The average State cost for one aggravated misdemeanor ranges from \$1,400 (court costs and probation) to \$7,300 (court costs with a jury, prison, parole, and indigent defense). Costs will be incurred across multiple fiscal years while the offender is supervised in the correctional system, either in prison or the community.

The average State cost for one Class D felony conviction ranges from \$5,100 (court costs, indigent defense, and probation) to \$13,200 (court costs with a jury, indigent defense, prison, and parole). Costs will be incurred across multiple fiscal years while the offender is supervised in the correctional system, either in prison or the community.

The average State cost for one Class C felony conviction ranges from \$6,000 (court costs, probation and indigent defense) to \$19,100 (court costs with a jury, prison, parole, and indigent defense). Costs will be incurred across multiple fiscal years while the offender is supervised in the correctional system, either in prison or the community.

The average State cost for one Class B felony conviction ranges from \$7,500 (court costs, indigent defense, and probation) to \$34,000 (court costs with a jury, indigent defense, prison, and parole). Costs will be incurred across multiple fiscal years while the offender is supervised in the correctional system, either in prison or the community.

Correctional Impact

For Bills that increase the penalty for an existing crime but the correctional impact is expected to be minimal, the standard sentence is: The correctional impact is expected to be minimal due to the low number of convictions under current law.

For Bills that create a new offense or crime and the impact cannot be estimated, the standard sentence is: The correctional impact of this new offense cannot be determined due to a lack of data with which to project the potential impact on the corrections system.

Fiscal Impact

For Bills that increase the penalty for an existing crime with minimal impact, the standard sentence is: The fiscal impact is expected to be minimal, because of the low number of convictions under current law.

For Bills that create a new offense or crime and the impact cannot be estimated, the standard sentence is: The fiscal impact of this new offense cannot be determined.

Example of Minority Impact Statement Standard Language:

Minority Impact Statements

The information below can be used as standard statements for Minority Impacts. Not all the statements would be used for all Minority Impacts. For example, if the minority impact is only on probation, the following background statements would be used: (first, fifth, and sixth bullets).

The statement under "Assumptions" regarding disabilities is standard for all minority impact statements due to the lack of available statewide information.

Background:

- The U.S. Census estimate for Iowa was 3.0 million people as of July 1, 2009 (the most current estimates available). Men comprise 49.3% of the population. Approximately 92.7% of Iowa's population is white. The composition of the remaining 7.3% is: 2.5% black, 0.3% American Indian or Alaska Native; 1.7% Asian; and 2.9% is of two or more races or unknown.
- The U.S. Department of Justice estimates there were 2.3 million offenders incarcerated in federal or State prisons and local jails on June 30, 2009 (the most recent data available). Men comprise 91.2% of the population. Approximately 39.4% of the 2.3 million offenders were black; 34.2% were white; 20.6% were Hispanic; and 5.8% were of other races or unknown.
- Iowa's prison population was 8,603 offenders on June 30, 2010. Men comprised 91.8% of the population. According to the Criminal and Juvenile Justice Planning Division (CJJPD) of the Department of Human Rights, the racial composition of the prison system was: 71.7% white; 25.5% black; 1.0% Asian or Pacific Islander; and 1.8% American Indian or Alaska Native. Included in these racial groups were 6.8% that identified themselves as Hispanic (nearly all of these identified themselves racially as being white).
- According to the CJJPD, on June 30, 2010, approximately 8.2% of the offenders in prison were women and 26.1% of offenders under supervision in Community-Based Corrections (CBC) were women. Approximately 21.5% of the total offender population under correctional supervision were women.
- According to the U.S. Department of Justice, 76.0% of offenders on probation nationwide are men. Nationally, approximately 56.0% of offenders on probation are white; 29.0% are black; 13.0% are Hispanic or Latino; 1.0% are American Indian or Alaska Natives; and 1.0% are Asian or Pacific Islander.
- According to the Department of Corrections (DOC), 72.2% of offenders on probation on June 30, 2010, were men. Approximately 78.5% of offenders on probation are white; 13.4% are black; 5.1% are Hispanic or Latino; 1.1% are American Indian or Alaska Natives; 1.0% are Asian or Pacific Islander; and 1.0% were of unknown race.
- According to the U.S. Department of Justice, 88.0% of offenders on parole nationwide are men. Nationally, approximately 41.0% of offenders on parole are white; 38.0% are black; 19% are Hispanic or Latino; 1.0% are American Indian or Alaska Natives; and 1.0% are Asian or Pacific Islander.
- According to the DOC, 83.7% of offenders on parole on June 30, 2010, were men. Approximately 75.5% of offenders on parole are white; 18.1% are black; 3.9% are Hispanic or Latino; 1.5% are American Indian or Alaska Natives; and 1.0% are Asian or Pacific Islander.

Assumptions:

Approximately 14.8% of Iowa's population has at least one disability. The number of disabled offenders convicted under this Bill may be 14.8%.