



## Lobbyist Online Registration, Declaration and Reporting

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## Log In to the Lobbyist System:

- **URL-** [www.legis.iowa.gov/portal/lobby](http://www.legis.iowa.gov/portal/lobby)
- OR click the **Applications** link at the bottom of the legislative website home page ([www.legis.iowa.gov](http://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:\***

  
**Password:\***

#### New Users

If you have problems or questions signing in, please contact the Help Desk at [515.281.6506](tel:515.281.6506).

- **Lobbyists who are already using portal applications** (including: Bill & Rules Watch, BMS, RMS, Factbook, Fiscal Notes, Materials Distributed, 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 the 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

I agree to the [Terms of Use](#).

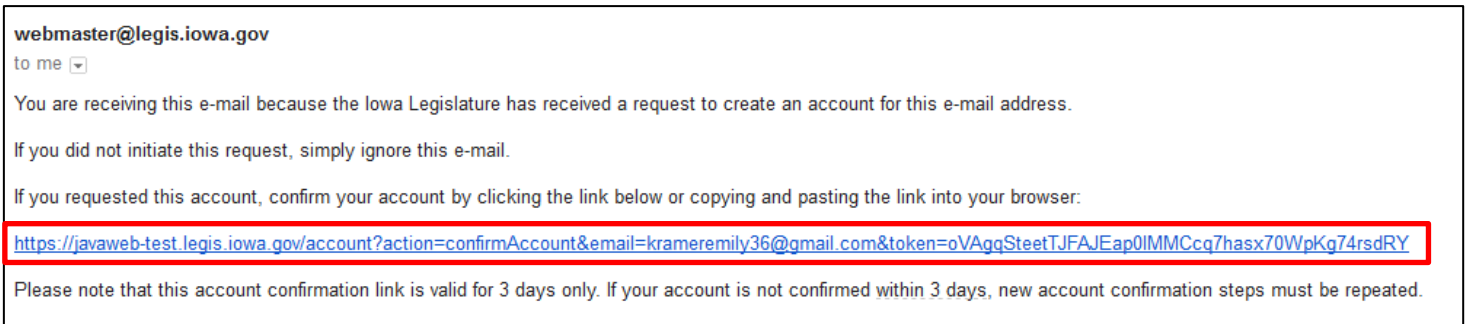
If you are a legislative user or already have an account, click here to [sign in](#).

If you have problems or questions signing in, please contact the Help Desk at [515.281.6506](tel:515.281.6506).

- 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 criteria are met, confirm the password by typing it again into the Confirm Password box.)

- Check the “I’m not a robot” box and answer any question that appears by clicking the appropriate pictures displayed.
- Check the “I agree to the Terms of Use.” checkbox. You can view the terms by clicking the **Terms of Use** link.
- 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 fairly quickly after finishing the Create Account process.

\*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:



- Click the link in the message (outlined in red above) or copy and paste the link into a browser to confirm your account.
- Please note that this account confirmation link is valid for only three days. If your account is not confirmed within three days, you must complete the create account process again. 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 in to the system.

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

When you first enter the Lobbyist System, the Edit Account/Registration page will appear.


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

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.

## Edit Account/Registration:

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

### Registration



NO IMAGE AVAILABLE

1 **User Type:\***

2 **First Name:\***

3 **Last Name:\***

4 **Middle Name:**

**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:\***

9 **City:\***

10 **State:\***

11 **Zip:\***

12 **Phone:\***

13 **Alternate Phone:**

14 **Cell Phone:**

Share Cell Phone Info with Public

15 **Photo (Optional):**  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):**

**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.

## 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** for definitions of these terms.
- If the user type is grayed out and you need to make a change, please contact the Lobbyist Clerk.

## 2. First Name (Required)

- This field should already be filled for you. It can be edited on this page at any time.

## 3. Last Name (Required)

- This field should already be filled for you. It can be edited on this page at any time.

## 4. Middle Name (Optional)

- This field is optional. You may enter a middle name if you wish.

## 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 will use to contact you via email. Make sure the email address entered is accurate and update it as needed on this page.
- If you wish to share your email with the public, check the “Share Email Info with Public” box. The email address will then be visible to anyone that visits our website.

*\*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 available to all.*

## 7. Alternate Email Address

- 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 of these fields are required.

## 12. Phone (Required)

- Enter the phone number you wish to share with the public. 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 available to all.*

## 15. Photo (Optional)

- You may upload a photo of yourself that will be displayed on the internal portion of the site only. 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 be added to your account.
- If you wish to have a photo taken for this purpose, go to the Legislative Information Office (LIO) on the ground floor of the Capitol Building.

*\*Though a photo is not required, legislators appreciate seeing them for each lobbyist to facilitate introductions.*

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.*

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

- Check the appropriate box(es) that indicate you will be lobbying the Legislative Branch, Executive Branch, and/or represent the Governor's Office. Check all that apply. As this 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 display under the Client Information heading. (See Below) New lobbyists will not see any clients here.

**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 3M Company ←  
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  
 **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  
**Notes:**  
(Summary of changes)  
(Maximum of 500 characters allowed)  
**Save** **Cancel**

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

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


Click the appropriate radio button under Contact #1 and/or Contact #2 to update the Client Contact information.

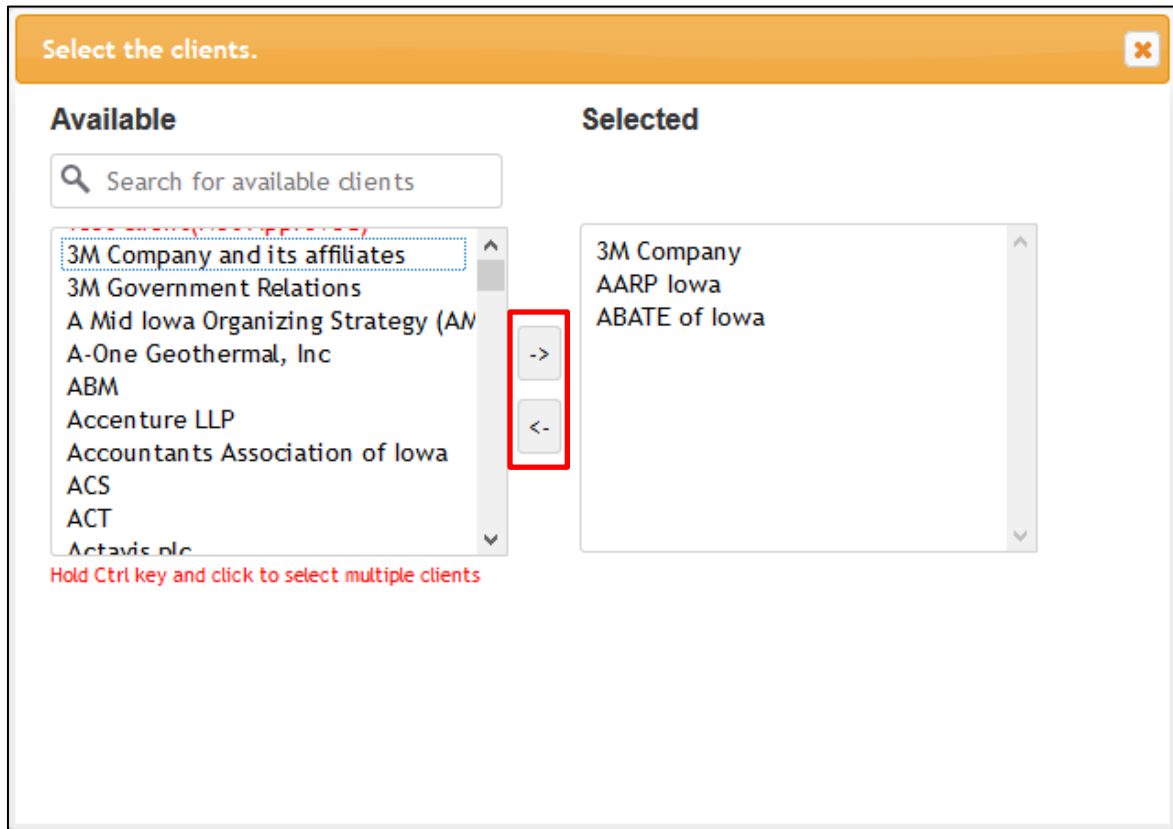
If you wish to change the current contact's information, click on the first radio button and make your changes.

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

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

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

- 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 pencil icon  next to **Click to select clients**. You will then see a list of available clients from which you can select in the list at left. (See Below)




- **To search for a client in the list of available clients**, type a word into the  field. This will filter out and display only the clients that contain this word.
- **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.
- **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 or removed from your account if changes were made after you registered for the upcoming session. This date stamp will also appear on the 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 plus icon  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:\***

**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.

**Contact #1\***

**Email:\***

**First Name:\***

**Last Name:\***

**Phone:\***

**Secondary Email:**

**Secondary Phone:**

**Contact #2 \***

**Email:\***

**First Name:\***

**Last Name:\***

**Phone:\***

**Secondary Email:**

**Secondary Phone:**

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

To cancel the addition of a new client, click the red "X".

Enter the client name and an address for the client. (Required). Enter a phone number for the client (Optional).

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".

**NOTE**

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

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.

Enter the email, name, and phone number of a secondary 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).

\*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.”) If approved, the client will be added to your account automatically.

### 18. Support Staff Information (Optional)

- If you will have support staff person(s) assisting with entering information or declaring for you, enter their email address, first name, and last name, respectively. This person is NOT a lobbyist. (See Below)

**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.

**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.

The following support staff can file on your behalf.

| Email            | First Name | Last Name | Remove                              |
|------------------|------------|-----------|-------------------------------------|
| john.doe@msn.com | John       | Doe       | <input checked="" type="checkbox"/> |
| mary.doe@msn.com | Mary       | Doe       | <input type="checkbox"/>            |

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 (outlined 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.

Clicking the **Reset** button at the bottom of the page will remove any account information that was just changed in the current online session.

After clicking the **Save** button:

- Returning Lobbyist- 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. For example, the screenshot below shows that John Doe and Jane Doe are associates.



### Add/Remove Associates:

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


| Associates I Added   |           |                    |              |              |  Click to add Associates |
|--|-----------|--------------------|--------------|--------------|---|
| First Name   | Last Name | Email              | Created By   | Created Date | Remove  |
|  Jane | Doe       | jane.doe@gmail.com | Emily Kramer | 06/26/2019   |                          |


| Associates Who Added Me  |           |                    |              |              |   |
|--|-----------|--------------------|--------------|--------------|---|
| First Name   | Last Name | Email              | Created By   | Created Date | Remove  |
|  Jane | Doe       | jane.doe@gmail.com | Emily Kramer | 06/26/2019   |  |

**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 automatically. The associate would need to add you as an associate in their account for that to happen.

2a. To **add an associate**, click the plus sign icon,  next to **Click to add Associates**, choose the name of the person you wish to add as an associate, and then click the **Associate** button. That person is now an 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 red "X"  (outlined 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 of the people you have granted permission to declare on your behalf. The second table shows all of the people who have added you as an 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.

You can remove not only associates you added, but also people who have added you as an associate by clicking the  next to their name. (Outlined 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** at left, check the box in front of your name **ONLY** and click **Continue**.  
**NOTE:** Your name and all of 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

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


| <input type="radio"/> For <input type="radio"/> Against <input type="radio"/> Undecided | Lobbyists (Lobbyist will display when client is selected.) |                                  |
|---|--|----------------------------------|
| Select a Client   |  | <input type="button" value="X"/> |
| Select a Client   |  | <input type="button" value="X"/> |
| Select a Client   |  | <input type="button" value="X"/> |
| Select a Client   |  | <input type="button" value="X"/> |
| Select a Client   |  | <input type="button" value="X"/> |

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

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 button, a new declaration table will be added to the page.

2. Enter the bill number 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; 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 also.
4. Select the client(s) for whom you are declaring from the drop-down(s) in the first column at left. 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. These comments are optional. Comments WILL display 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 the declarations. You will be taken to a confirmation screen where you can verify your declarations are correct before submitting them.

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

See example screen below:









Declarations are done for:  
**John Doe**

**Declaration 1** Click to add 1 client  

**Bill Number:** HF 10  
e.g. HF 12, HF12

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

For  Against  Undecided

|                 | Lobbyists (Lobbyist will display when client is selected.) |   |   |
|-----------------|--|---|---|
| AARP Iowa       | Doe J  | Against    |  |
|                 |  | Comments here...<br><small>234 characters remaining</small>                                   |   |
| 3M Company      | Doe J  | For        |  |
| ABATE of Iowa   | Doe J  | Undecided  |  |
| Select a Client |  |   |  |
| Select a Client |  |   |  |

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

Add More Bills **Next** Cancel

8. The declaration confirmation screen appears. (See below) This screen displays the declaration(s) you made in the previous steps.
  - To confirm 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.) Then make the necessary changes and click **Next** again to return to this 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    | <b>Doe J</b> | For                         |
| AARP Iowa     | <b>Doe J</b> | Against    Comments here... |
| ABATE of Iowa | <b>Doe J</b> | 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 declarations have been made successfully and you will see the declarations made below it.

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    | <b>Doe J</b> | For       |
| AARP Iowa     | <b>Doe J</b> | Undecided |
| ABATE of Iowa | <b>Doe J</b> | 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 your declarations, click the **View Declarations** link at left.


## Declare Others on Bills:

\*You may only declare on behalf of another lobbyist if they have added you as an **Associate**. (See [Page 11](#))

1. Click the **Make Declarations** link in the left pane.
2. 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.

3. On the next page, enter the bill number 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.
4. Enter your position on the bill using the radio buttons provided. (For, Against, or Undecided) This can be changed on an individual basis also.
5. 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 will display 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.
6. In the Lobbyists column, the person for whom you are declaring is shown. You can change the declaration by choosing a different position from the drop-down next to the lobbyist name.
7. Click the **Comments** icon  to make any comments on the bill, position or client. These comments are optional. Comments WILL display 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.

8. When finished, click the **Next** button to move on to the next step. Clicking **Next** will NOT submit the declarations. You will be taken to a confirmation screen where you can verify your declarations are correct before submitting them.

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

9. The confirmation screen appears. This screen displays the declaration(s) you made in the previous steps.
  - To confirm 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.) Then make the necessary changes and click **Next** again to return to this confirmation page.
  - To delete the declaration(s), click **Cancel**.

\*See the screenshot of the declaration confirmation screen in the previous section.

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 declarations were made successfully and you will see the declarations made below it.

Click the **Declare Again** button to declare on another bill with the same user(s) you selected in Step 2. To view declarations, click the **View Declarations** link at left.


### Declare Yourself AND Others on Bills:


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

### 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

3. On the next page, enter the bill number 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.
4. Enter your position on the bill using the radio buttons provided. (For, Against, or Undecided) This can be changed on an individual basis also.
5. Select the client on whose behalf you are declaring from the drop-downs provided. In this case, the client drop-down contains the combined list of all clients represented by you and the associate(s) you selected in Step 2. The system will NOT allow a user to declare for a client they do not represent.
6. In the Lobbyists column, the person for whom you are declaring is shown. You can change individual declarations by choosing another position from the drop-down next to each name.
7. Click the **Comments** icon  to make any comments on the bill, position or client. These comments are optional. Comments WILL display 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.

8. When finished, click the **Next** button to move on. Clicking **Next** will NOT submit the declarations. You will be taken to a confirmation screen where you can verify your declarations are correct before submitting them.

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



9. The confirmation screen then appears. This screen displays the declaration(s) you made in the previous steps.
  - To confirm 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.) Then make the necessary changes and click **Next** again to return to this confirmation page.
  - To delete the declaration(s), click **Cancel**.

\*See an example of the declaration confirmation screens in the **Declare Yourself on Bills** section.

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 declarations have been made successfully and you will see the declarations made below it.

Click the **Declare Again** button to declare on another bill with the same user(s) you selected in Step 2. To view declarations, click the **View Declarations** link at left.

### View & Edit Declarations on Bills:

To show previous declarations or change new declarations, click on the **View Declarations** link in the left pane. You will see something similar to the screen below.

### Declarations (John Doe)

**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:**

| 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) previous 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 outlined in orange on the screen above)

- For example, entering a start and end date into the date fields provided and then clicking **Search** will display only declarations made within that date range.
- Entering “HF123” in the Bill field and clicking the **Search** button would display only declarations made on HF 123.
- You can choose a declaration from the declaration drop-down and filter out just the declarations with that position. For example, selecting “For” from the Declaration drop-down and hitting **Search** would show only “For” declarations.
- If you wish to filter out only the declarations you made on behalf of a certain client, type a client name into the client field and hit the **Search** button to display only declarations made for that particular client.

To clear any search results and display all declarations, click the **Cancel** button. Your screen will then refresh to show all declarations.

### Functionality in Declaration Table:

- Click on any underlined column heading in the table to sort declarations by that criterion. For example, if you wish to sort your list of declarations by bill number, click the underlined Bill column heading and the declarations will sort according to bill number.
- Click on a **Bill Number** link in the Bill column to be taken to all bill information and the full text of the bill in the BillBook application. (A new tab will open showing the bill in BillBook.)
- Click the icon in the **Comments** column  to enter or view any comments entered. Comments are optional. Comments WILL display on the public website.
- Click the **Withdraw/Delete** 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). Then click **Save**. (See below)
  - 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.
  - 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. When a declaration is deleted, it is no longer visible to the public on the website. We maintain a record internally of the original declaration and its deletion. Contact the Lobbyist Clerk with questions.

Withdraw/Delete Declaration for HF 5
✕

Date: 09/01/2017 02:34 PM

Status: 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.

Comments: (Optional)

(Maximum of 250 characters allowed)

Save

## 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 messages 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:

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

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 also set the default number of clients for each declaration on the 'Make Declarations' page here.

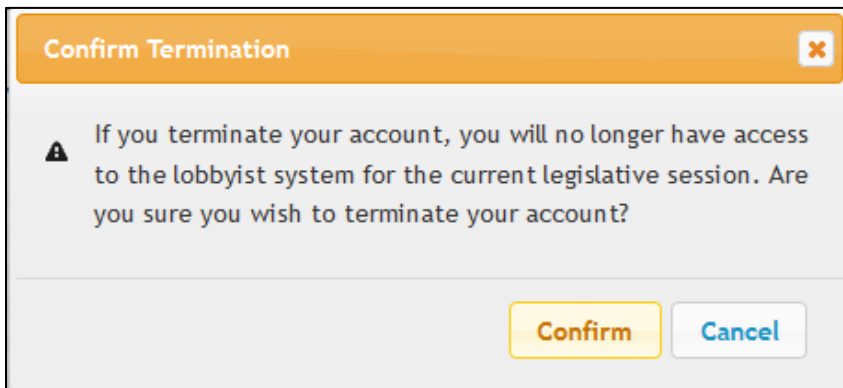
Enter the desired number for each by using the arrows provided or typing in the number. You may change these numbers at any time by revisiting the Preferences page.

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. If not, click the **Cancel** button. (See above)

**NOTE:** After terminating your account, you can still log into the system to file a Client Report. However, you will no longer be able to edit your account information, add associates, make declarations or file pre-function and function reports. You will be able to view information previously entered for your account, but everything will be “read-only”.

\*If you have mistakenly terminated your account or you 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 the sessions 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.

## 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.

## Bills & Rules Watch Interaction:

When declaring on bills in the Lobbyist System, you will automatically be subscribed to receive email notifications when there is action on your declared bills.

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

Refer to [Bills & Rules Watch User Guide](#) for an explanation of notifications.

Support staff can also receive the email notifications sent from a lobbyist's Bills & Rules Watch collections, if the proper box is checked on the Preferences page (See Below)

Send Bills and Rules watch to all support staff.

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

**\*NOTE:** Support staff CANNOT view and 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.

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 you will see a Meetings on Bills table showing scheduled upcoming meetings for the current day. The committee schedule displays scheduled meetings on bills for all collections by default. See example below:

The screenshot shows a table titled "Meetings on Bills" with the following content:

| Committee meeting   |
|---|
| 10/28/2020 09:00 AM<br>House Education: RM 15<br><a href="#">SF 438</a>   |
| Subcommittee meeting  |
| 10/28/2020 09:00 AM<br>Senate Commerce: RM G17<br><a href="#">SF 2236</a> |
| Committee meeting   |
| 10/28/2020 09:30 AM<br>Senate Commerce: RM 116<br><a href="#">SF 2409</a> |

Callout 1: Clicking the PDF icon will display a PDF with all committee and subcommittee information.

Callout 2: Clicking the bill link(s) will open a new tab showing all information about the bill in the BillBook application.

### **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 at left and then click the **Play** button.