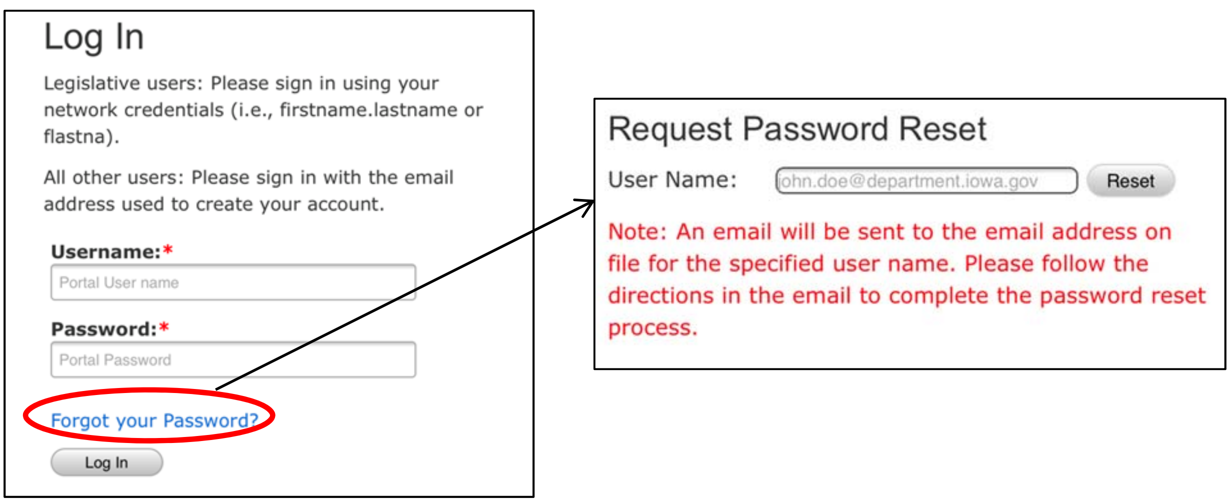
Client Reports

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

Contact the Senate Lobbyist Clerk, Kathy Stachon, at 515.281.5932 or kathy.stachon@legis.iowa.gov, or the House Lobbyist Clerk, Michelle Haupts, at 515.281.5498 or michelle.haupts@legis.iowa.gov for guidance with filings.

To Log In to the Lobbyist System:

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



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

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

Client Reports can now be submitted at any time throughout the year, there will no longer be an opening date for client reporting in the system. Client Reports will still need to cover the same time frame, this year, that is **7/1/19- 6/30/20. Reports will still be due each year on **July 31** for the previous fiscal year. If you remove a client from your account in the middle of a Fiscal year, you will be given an opportunity to file the client report at the time of client removal.

*** If you are lobbying as a matter of personal interest, when you add the “personal interest” client, the system will automatically file a client report for you on July 1 as $0.00. The report is amendable if needed.

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

Client Reports

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


Client Reports (John Doe)

Year: 2017

Year: 2017
Year: 2016
Year: 2015
Year: 2014
Year: 2013

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

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

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

Client: Search for reports by client

Client	Reporting Period	Date	Filed By	Update
AARP Iowa	07/01/2016 - 06/30/2017	07/31/2017 09:29 AM (Last Modified Date: 07/31/2017 09:29 AM)	System User (Last Modified By: System User)	
Iowa Behavioral Health Association (IBHA)	07/01/2016 - 06/30/2017	07/19/2017 03:21 PM (Last Modified Date: 07/19/2017 03:21 PM)	System User (Last Modified By: System User)	

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

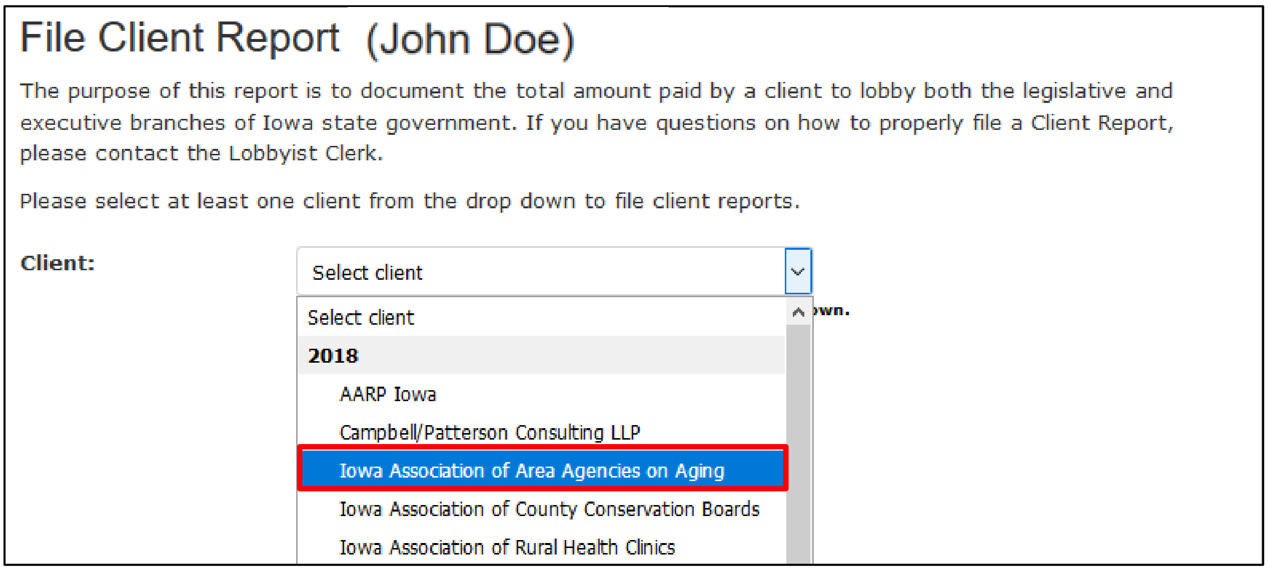
*<u>NOTE</u>: This will only work for lobbyists that have filed client reports in the past. If this is your first year as a lobbyist, you will not see earlier years in the drop-down.

File a Client Report:

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

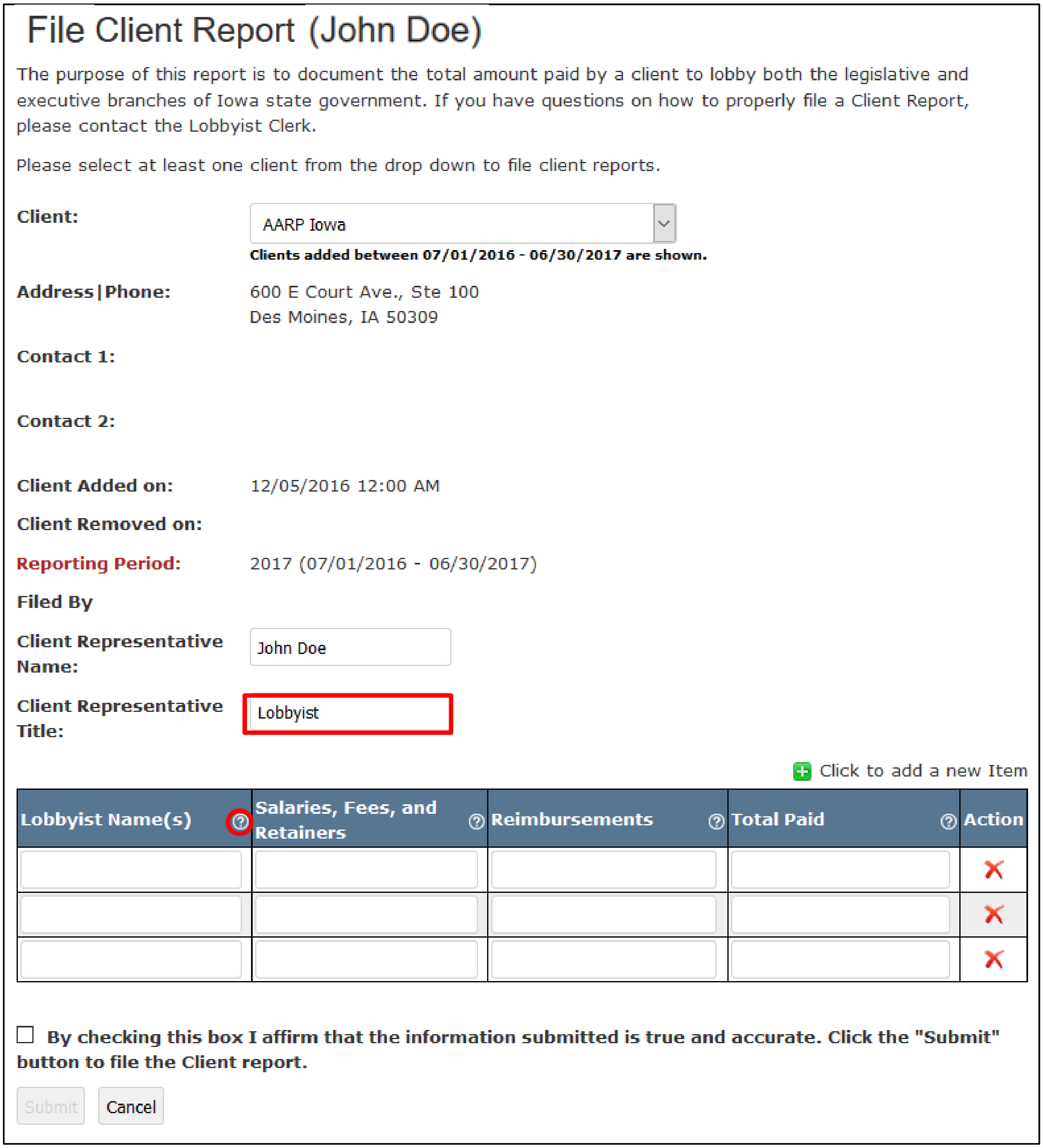
If you only represent one client, the client will be selected for you automatically and you will not see a client drop-down.

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



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

You must fill in the **Client Representative Title** field. If you are a lobbyist that represents this client, type “Lobbyist” into the Client Representative Title field. See below:



File Client Report (John Doe)

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

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

Client: AARP Iowa

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

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

Contact 1:

Contact 2:

Client Added on: 12/05/2016 12:00 AM

Client Removed on:

Reporting Period: 2017 (07/01/2016 - 06/30/2017)

Filed By

Client Representative Name: John Doe

Client Representative Title: Lobbyist

Click to add a new Item

Lobbyist Name(s)	Salaries, Fees, and Retainers	Reimbursements	Total Paid	Action
				✗
				✗
				✗

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

Submit Cancel

*<u>NOTE</u>: If any of the client information is incorrect (address or contact(s)), click the **Edit Account** link at left. In the **Client Information** section, click on the linked name of the client whose information you wish to change, make the changes in the window that appears and then click **Save**. Click the **Client Reports** link at left again and follow the previous steps to begin filing the client report.

Using the rows in the table provided, list each lobbyist that represents the selected client. Some clients may have several lobbyists. Some may only have one.

If you have questions regarding what to enter into each field in the table, hover over the ? next to each column heading for an explanation. (Circled in red on the previous page)

If you still have questions about filling out the client report, contact the Lobbyist Clerk. (Contact information for the Lobbyist Clerk can be found on Page 1 of this document.)

Enter the amount(s) for salaries, fees, and retainers and reimbursements for each lobbyist. The amount in the Total Paid column should be the sum of expenses for each lobbyist.

If you wish to add another row to the table, click the plus sign icon in front of "Click to add a new Item" at the top of the table. (Outlined in orange below)

If you wish to remove a row in the table, click the red "X" in the Action column. (Outlined in green below)

Click to add a new Item

Lobbyist Name(s)	Salaries, Fees, and Retainers	Reimbursements	Total Paid	Action
John Doe	20,000	1,000	21,000	X
				X
				X

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

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

Submit Cancel

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

Client	Reporting Period	Date	Filed By	Update
Iowa Dept. of Natural Resources	07/01/2017 - 06/30/2018	09/05/2017 02:19 PM	Emily Kramer	
3M Company	07/01/2017 - 06/30/2018	09/05/2017 01:16 PM	Emily Kramer	

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

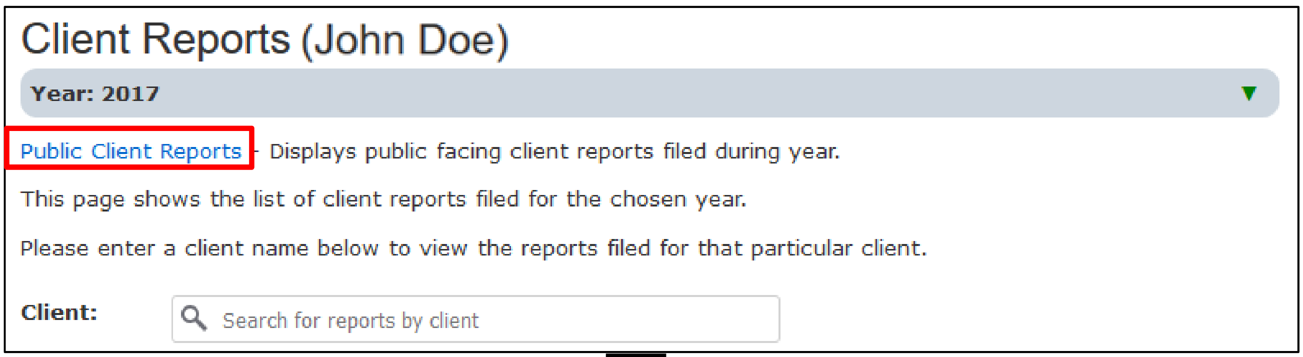
*NOTE: An internal record of the original client report with date and time stamp is kept in the system for reference.

View Client Reports:

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

OR

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



Client Reports (John Doe)

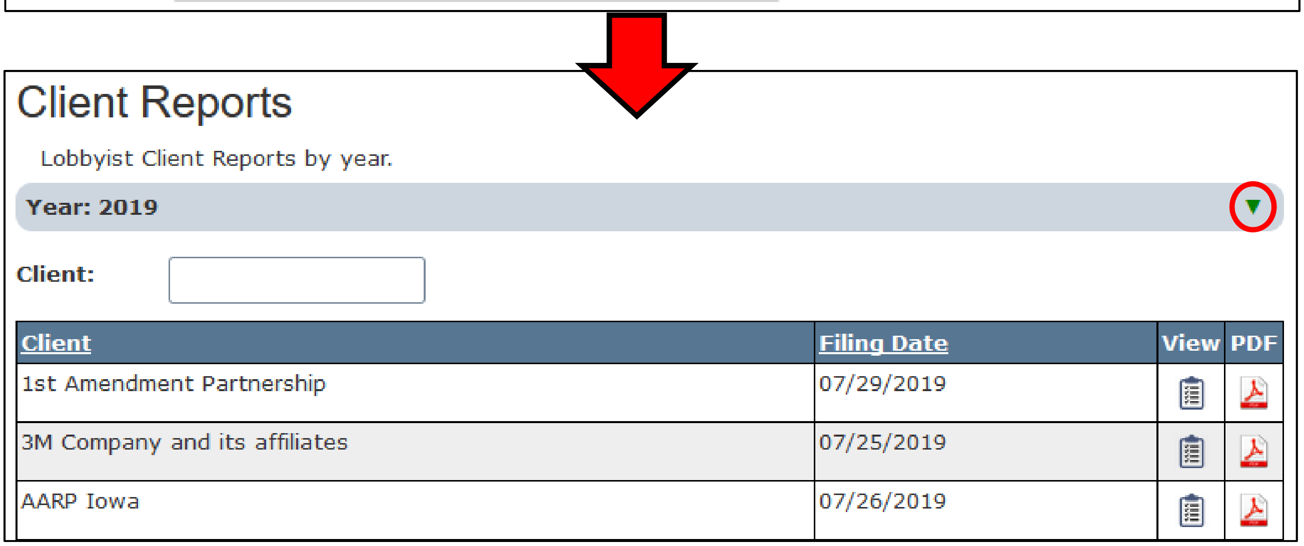
Year: 2017

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

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

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

Client: Search for reports by client



Client Reports

Lobbyist Client Reports by year.

Year: 2019

Client:

Client	Filing Date	View	PDF
1st Amendment Partnership	07/29/2019		
3M Company and its affiliates	07/25/2019		
AARP Iowa	07/26/2019		

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