



### Pre-Function and Function Registration

Reporting is required for functions that Iowa Code section [68B.22\(4\)\(s\)](#) exempts from the \$3.00 limitation on gifts of food, beverage, and entertainment when (1) the function takes place during a regular session of the General Assembly, and (2) all 150 members of the General Assembly are invited to attend.

A **Pre-Function Registration** is required to be filed five days prior to the date of a function authorized by Iowa Code section [68B.22\(4\)\(s\)](#). A **function report** must be filed within 28 calendar days following the date of a function authorized by Iowa Code section [68B.22\(4\)\(s\)](#).

If you have problems or questions, please contact Caroline Warmuth at 515.281.5308 or [Caroline.Warmuth@legis.iowa.gov](mailto:Caroline.Warmuth@legis.iowa.gov) or Charlie Smithson directly at [Charlie.Smithson@legis.iowa.gov](mailto:Charlie.Smithson@legis.iowa.gov) for the Senate. For the House, contact Meghan Nelson directly at [Meghan.Nelson@legis.iowa.gov](mailto:Meghan.Nelson@legis.iowa.gov) for guidance with filings.

### To Log in to the Lobbyist System:

Go to the legislative website ([www.legis.iowa.gov](http://www.legis.iowa.gov)) and click the **Applications** link at the bottom of the page to navigate to the log in screen.

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

**Log In**

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

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

**Username:\***  
Portal User name

**Password:\***  
Portal Password

[Forgot your Password?](#)

Log In

**Request Password Reset**

User Name:  **Reset**

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

**\*NOTE:** If you forget your password, click the “Forgot your Password?” link provided on the sign in page. (Outlined in red in 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.

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

## Pre-Function & Function Reports:

Once in the Lobbyist System, click the **Function Reports** link at left. The page that appears shows the list of pre-function and function reports that have been filed for the current session.

If you have not filed any pre-function or function reports for the current session, you will have an empty table. See below:

Function Date	Function Sponsor(s)	Location	Pre-Function Registration Date	Filing Date	Filed By	Edit
*** No function reports in the system ***						

If you have filed pre-function or function reports for the current session, you will see a screen like the one below.

### Function Reports (John Doe)

**General Assembly: 87 Session: 1 (01/09/2017 - 01/07/2018)** ▼

- [General Assembly: 87 Session: 1 \(01/09/2017 - 01/07/2018\)](#)
- [General Assembly: 86 Session: 2 \(01/11/2016 - 01/08/2017\)](#)
- [General Assembly: 86 Session: 1 \(01/12/2015 - 01/10/2016\)](#)
- [General Assembly: 85 Session: 2 \(01/13/2014 - 01/11/2015\)](#)
- [General Assembly: 85 Session: 1 \(01/14/2013 - 01/12/2014\)](#)

**Public Function Reports** - Displays public facing function reports filed during session.

This page shows the list of pre-function and function reports filed for the current session.

You may edit the pre-function report until the function report is filed. Once the function report is filed, the pre-function report will be overwritten. You may edit the function report at any time using the icon in the Action column of the table below. A record of each amended copy of the function report will be saved with the date and time stamp that the change was made. A red date indicates a report filed late. The word "Due" preceding a date indicates a report has not been filed.

Function Date	Function Sponsor(s)	Location	Pre-Function Registration Date	Filing Date	Filed By	Edit
08/08/2017	3M Company	Capitol Rotunda	09/05/2017	09/05/2017 12:15 PM (Amended Report)	Emily Kramer	
08/08/2017	3M Company	Capitol Rotunda	09/05/2017	09/05/2017 12:14 PM	Emily Kramer	

The screen will always display pre-function and function reports filed for the current session by default.

If you have lobbied in the past and wish to view or edit previously filed function reports, click the arrow (circled in red on the screen above) and choose a previous session from the drop-down. The screen will then refresh, and the reports filed for that session will be displayed.

**\*NOTE:** Only lobbyists that have filed function reports in the past will be able to view function reports from previous years in the Lobbyist System.

## File a Pre-Function Report:

To file a new pre-function report (which must be done at least five days prior to the function date), click the yellow **Pre-Function Registration** button in the upper left corner.

Pre-Function Registration

You will see a screen like the one below:

### Pre-Function Registration (John Doe)

A Function Pre-Registration is required to be filed five days prior to the date of a function authorized by Iowa Code section 68B.22(4)(s). A Function Report must be filed within twenty-eight calendar days following the date of a function authorized by Iowa Code section 68B.22(4)(s).

**Name:** John Doe

**Business Address:** 123 Oak Ave  
Des Moines, IA 50319  
515.281.3155

**2 Date of the event:\***

**3 Time of the event:\***  8  00  AM **4 End Time:** 8  00  AM  
 Other

**5 Location of the event:\***

**6 Sponsors:**

#### Available

- AARP Iowa
- ABATE of Iowa
- Accountants Association of
- AFLAC
- Agribusiness Association of
- Arconic (Formerly Alcoa)
- Alliance of Automobile Mar
- Alliance Pipeline, Inc.
- Alliant Energy Corporation
- Allied Insurance

Hold Ctrl key and click to select multiple sponsors

(OR)

#### New Sponsor

->

Click -> button to add new sponsor

You can select multiple clients from the list of 'Available' clients and make them as sponsors. If you want to add a new sponsor, enter sponsor name in the 'New Sponsor' field and click on -> buttons.

**7 Notes:**

(Maximum of 500 characters allowed)

**8**

Required fields are labeled with \*. These fields MUST be filled in before your pre-function report can be submitted.

1. The name of the lobbyist, business address, and phone number will be filled in automatically according to your account information.

**\*NOTE:** You cannot edit this information on this page. If you wish to edit your account information, click the **Edit Account** link at left, make the necessary changes on that page and click **Save**. Return to the Function Reports section by clicking the **Function Reports** link in the navigation pane and then clicking the yellow **Pre-Function Registration** button in the upper left-hand corner. The information on the page that appears will have updated to reflect the changes made on the “Edit Account” page.

2. Enter the date of the function by clicking in the “Date of the event” text box and either selecting the date from the calendar or typing the date into the field. (If typing the date, use “mm/dd/yyyy” format.)
3. Enter the start time of the event using the drop-downs provided to select the proper start time.
4. Enter the end time of the event using the drop-downs provided to select the proper end time. Make sure the end time selected comes AFTER the start time selected.

**\*NOTE:** If the function has an approximate time such as “upon adjournment,” select the second radio button under the “Time of the event” field. This denotes an “Other” or approximate time. Enter the approximate time by typing it into the text box next to “Other.” See below:

Time of the event:\*  8 00 AM End Time: 8 00 AM

Other

5. Enter the location of the event by clicking in the text field and typing where the event is to take place. This is a free-form text box.
6. Choose sponsor(s) from the list of available clients in the drop-down on the left and click the  button to add the client as a sponsor for the function.

You may use the “Search for available clients” box (above) to filter out certain clients. For example, typing the word “Iowa” into the search box will narrow the list of available clients to only clients whose names contain the word “Iowa.”

You may select more than one sponsor at a time by holding down the Ctrl key and left clicking each client until all are selected.

To add a sponsor that is not currently in the list of **Available Clients**, enter the sponsor’s name in the **New Sponsor** text box and click the  button. This will add the new sponsor as a sponsor of the function.

To remove selected client(s), click on the client(s) in the **Selected** list on the right and then click the  button.

See example page below:

Sponsors:	Available		Selected
	<input type="text" value="Search for available clients"/> 1st Amendment Partnership 3M Company 3M Company and its affiliates 3M Government Relations A Mid Iowa Organizing Strategy (AMOS) A-One Geothermal, Inc AARP Iowa ABATE of Iowa Abbell & OVSE ABM	<input type="button" value="-&gt;"/> <input type="button" value="&lt;-"/>	
	<p>Hold Ctrl key and click to select multiple sponsors</p> <p>(OR)</p> <p>New Sponsor</p> <input type="text" value="Type New Sponsor Here"/> <input type="button" value="-&gt;"/>		
	<p>Click -&gt; button to add new sponsor</p> <p>You can select multiple clients from the list of 'Available' clients and make them sponsors. If you want to add a new sponsor, enter sponsor name in the 'New Sponsor' field and click on -&gt; buttons.</p>		

7. Add any notes in the field provided. (This is optional.)
  - Often, if a function is cancelled due to inclement weather, the user will put "Function cancelled due to weather" in the notes section.

<b>Notes:</b>	<input type="text"/> <p>(Maximum of 500 characters allowed)</p>
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8. After entering all the required information, click the **Submit** button to file the pre-function report. You will be taken back to the main Function Reports screen and the new pre-function report will be added to the table.

**\*NOTE:** You may edit the pre-function report until the function report is filed. Once the function report is filed, the pre-function report will be overwritten by the function report.

## To File a Function Report:

You will do this AFTER the scheduled date of the function has passed.

1. Click the **Function Reports** link in the left navigation pane of the Lobbyist System. All previously filed pre-function and function reports for the current session will be shown on the page. A Function Report must be filed within 28 calendar days following the date of a function.
2. In the table on the Function Reports page, click the **Edit** icon  next to the appropriate pre-function report to file the function report.
3. You will be taken to the screen where you previously entered information for the pre-function report, with additional fields to fill in. All the information entered when filing the pre-function report will be entered for you on this page. You can make changes to the date of the event, time of the event, location, sponsor information, and notes, if necessary.
4. Enter the expenditure information requested in the appropriate field(s).
5. When finished, click the **Submit** button to file the function report. You will be taken back to the Function Reports main page.

**\*NOTE:** You may edit a function report at any time using the icon in the **Edit** column of the table. A record of each amended copy of the function report will be saved with the date and time stamp that the change(s) was/were made. A red date in the Filing Date column of the table indicates a report filed late. The word "Due" preceding a date in the Filing Date column indicates a report has not been filed.

The Lobbyist Clerk would like to see each time a function report is updated. You will notice that when you edit/update a function report, you will see the original version as well as an amended version which will be noted with "(Amended Report)" in the Filing Date column. You will see the updated version of the report each time you make a change to the function report. Only the most recently amended function report will be displayed on the public website.

See an example of an amended and the original function report below:

Function Date	Function Sponsor(s)	Location	Pre-Function Registration Date	Filing Date	Filed By	Edit
09/01/2017	3M Company New Sponsor	capitol rotunda	09/05/2017	09/05/2017 01:03 PM	Emily Kramer	
08/08/2017	3M Company	Capitol Rotunda	09/05/2017	09/05/2017 12:15 PM (Amended Report)	Emily Kramer	
08/08/2017	3M Company	Capitol Rotunda	09/05/2017	09/05/2017 12:14 PM	Emily Kramer	

\*To view public function reports (those that display on the legislative website) filed during the current session, click the **Public Function Reports** link on the Function Reports home page. (See below)

## Function Reports (John Doe)

General Assembly: 87 Session: 1 (01/09/2017 - 01/07/2018) ▼

**Public Function Reports** - Displays public facing function reports filed during session.