

# **GAITS** Professional

**User Manual** 

# **Suggestions and Support**

LegiScan has a long history of being driven by the suggestions and needs of our users. Your feedback is appreciated and most welcome to help increase the value and utility of the system for the public service we offer. Please email your comments to <a href="mailto:support@legiscan.com">support@legiscan.com</a>. Technical support is also available from this email address. You can also find out more information and details by visiting our website at <a href="mailto:legiscan.com">legiscan.com</a>.

Please bear in mind that LegiScan is an impartial and non-partisan legislative data tracking service. We can assist with issues with the website and general legislative process and inquiries, but we do not offer legal opinion or impact analysis of individual legislation.

LegiScan LLC 1002 Lee Street East #11565 Charleston, WV 25339

Phone: 800-618-2750 Sales: <u>sales@legiscan.com</u> Support: <u>support@legiscan.com</u>

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### Introduction

The Government Affairs Information Tracking System (GAITS) is a web-based legislative information tracking and reporting service, providing innovative data-rich tools to government relations professionals and all branches of government. Using the LegiScan API legislative engine, users are afforded uniform data from multiple states with the ability to easily track and create dynamic reports on a wide array of legislative information. LegiScan saves time and assimilates legislative data in a manner that enhances analysis and communications with agency staff, clients, members, as well as consultants and government affairs professionals. LegiScan is certain to simplify the task of creating and distributing legislative reports to those who matter most and remain aware of germane legislation and issues that affect you and your organization.

### **Documentation Structure**

While the legislative process can be complex and convoluted, GAITS attempts to greatly simplify workflow and management. To that end we have created an abstract system that allows you to utilize the system in a manner more consistent with existing practices instead of forcing you into a static model. There are various configurations and options that are documented in this manual, some of which may not apply to your individual account setup. However the workflow is the same across all accounts and this guide will explain the system and how to accomplish specific tasks.

### **Dynamic Evolution**

Please keep in mind that GAITS is a constantly evolving system, and as such there may be minor alterations and differences to the information provided in this guide and the information provided in the live system. However the fundamental process will remain the same and when there is a significant change in process or features this document will be updated.

### LegiScan API

The LegiScan API is the soul of the LegiScan services, with over 10 years of development, this is what provides the normalized legislative data in real-time for the GAITS front end interface. The API is now available on a subscription model and is currently in already in use by other legislative monitoring companies to drive their own service offerings to clients. Providing either a push or pull model, an interface into the national full text search engine, full bill details & texts and more. For more information please contact us at <a href="mailto:sales@legiscan.com">sales@legiscan.com</a> or call 800-618-2750.

### **Getting Started**

The first time you access your account the first task is usually to setup your categorization lists. GAITS offers both single and dual layer classification. Depending on your particular account options the terms Topics, Clients and Issues are used. These are merely generic labels for categories that you are in control of how they are interpreted; used when tracking bills to associate for reporting purposes. For single layer the concept of Topics can be used to create general issue areas, specific clients, internal departments, geographic regions or any arbitrary set of labels you choose. In dual layer the terms become Clients and Issues, once again these are abstract lists that you control. The difference here is that Issues are thought of more as lower level broad categories that can then be associated with labels in the upper Client level, all of which can be used to group and associate bills on your monitoring list for management and later reporting.

### **Topic/Client Management**

In order to add a Topic/Client begin by navigating to the appropriate link in the navigation menu which will either be labeled My Topics or My Clients.

Enter the name in the textbox, and click the Add button.

#### eLobbyist Client Management

eLobbyist Client management allows you to manage clients so that monitored bills can be associated and grouped for reporting and management.

Quick Add	
Client Name: *	Add Client

You may then add optional free-form information for Contact Name, Email and Phone number that will appear on reports for this client. If using dual layer tracking there will be an optional area to associate the Client with existing secondary level Issues. The only required field is the Name.

eLobbyist Client Edit
Client Name: *
CLIENT 1
Name of the Client
Abbreviation: CL1 Abbreviation of the Client for reporting shorthand
Contact Name:
John Doe
Contact name for this Client
Email:
John.Doe@example.com
Email address to mail reports to for this Client
Phone: 555-555-1212 Contact phone number for this Client
Associated Issues
Business Taxes
Economic Development
Invironment
Health Care
Personnel
Technology

Save Client Cancel

## **Topic/Client Listing**

After adding Topics/Clients and associating bills the listing will look similar to:

Client Name	Monitoring	RSS
CLIENT 1	Monitoring 235 bills	Client RSS Feed
CLIENT 2	Monitoring 227 bills	S Client RSS Feed
CLIENT 3	Monitoring 238 bills	Client RSS Feed
CLIENT 4	Monitoring 0 bills	Client RSS Feed

Clicking the link in the first column will allow you to edit the details of that Topic/Client.

The Monitoring column indicates the number of bills currently associated with each Topic/Client and will provide a drilldown view into the common bill browser interface.

The RSS Feed is a unique private link for a RSS stream of the bills for each respective Topic/Client that can be used to monitor that group offline with RSS software such as Google Reader to be notified when the status of bill changes. You may also choose to share this link with others so they can also stay updated without the need to have an account or accessing the full GAITS interface.

### **Issue Management**

Managing secondary level Issues is very similar to Topic/Client management and can be accessed with the appropriate link in the navigation menu which will be labeled My Issues. When editing an Issue there is an optional area to create an association with an existing Client level group.

### eLobbyist Issue Edit

Issue Name:	
Business Taxes	
Name of the issue	
Issue Abbreviation:	
Abbreviated name of the issue for reporting	
Associated Clients	
CLIENT 1	
CLIENT 2	
CLIENT 3	
CLIENT 4	
Edit Issue Cancel	
Calce 1350e	

### **Issue Listing**

After adding Issues and associating bills the listing will look similar to:

Issue Name	Clients	Monitoring	RSS
Business Taxes	CLIENT 2 CLIENT 3	Monitoring 129 bills	SISSUE RSS Feed
Economic Development	CLIENT 2 CLIENT 3	Monitoring 131 bills	SISSUE RSS Feed
Environment	CLIENT 1 CLIENT 3 CLIENT 4	Monitoring 129 bills	SISSUE RSS Feed
Health Care	CLIENT 1 CLIENT 3	Monitoring 141 bills	S Issue RSS Feed
Personnel	CLIENT 2 CLIENT 3	Monitoring 130 bills	SISSUE RSS Feed
Technology	CLIENT 1 CLIENT 3	Monitoring 136 bills	Issue RSS Feed

Clicking the name in the first column will allow you to edit the details of that Issue.

The Clients column shows which clients are currently associated with each Issue area.

The Monitoring column indicates the number of bills currently associated with each Issue and will provide a drilldown view into the common bill browser interface.

The RSS Feed is a unique private link for an RSS stream for the bills for each respective Issue that can be used to monitor that group offline with RSS software such as Google Reader to be notified when the status of bill changes. You may also

choose to share this link with others so they can also stay updated without the need to have an account or accessing the full GAITS interface.

### **Monitoring Bills**

Regardless of whether or not you choose to create classification Topics/Clients and Issues the true purpose of GAITS is to monitor legislation which requires you to add bills to your My Bills monitoring list. There are a two basic ways to accomplish this, using the Monitor Bill form or by accessing a specific bill detail page and using the Tracking Information form.

If you know the individual bill number of have an existing list of bill numbers that you want to monitor you can use the Monitor Bill link in the navigation menu.

Monitor Bill		
State: Select State 💌		
Bill Number: Monitor Bill		
Optionally you may specify one or more clier	nts that the imported bill or bills will automatic	ally associated with by selecting from the list below:
CLIENT 1	CLIENT 2	CLIENT 3
Bulk Bill Import		
Bill Numbers: Enter a list of bill numbers, seperated by space, ta etc.) Monitor Bills	ib, comma, newline. Bills should be in the form relat	ive to their state (eg HB3920, SB182, SF129, A00392, SR39,

Select the state from the dropdown listing and then you can enter a single bill number or a bulk list. In either case all operations on this form work only for the single selected state at a time. If you have multiple states to import you must import each state group separately.

Additional you can immediately associate the imported bills with a Topic/Client by selecting from the existing list.

### **Tracking Information**

On the Summary tab of each bill detail page from states that you are eligible to monitor is the Tracking Information form which is the primary method to interact with the bills on your monitoring list; classifying, recording priority, stances, highlights and adding private internal notes for reporting.

▽ Tracking Information						
- ▽ - Associated Clients (no assignments) -						
CLIENT 1	CLIENT 2	CLIENT 3				
→ > Associated Issues (no assignments)—						
Highlight: 🔘 Yes 🖲 No						
Stance: 🔘 Support 🔘 Oppose 🖲 No St	ance					
Priority: 🔘 10 🔘 9 🔘 8 🔘 7 🔘 6 🔇	) 5 🔘 4 🔘 3 🔘 2 🔘 1	O				
Create new note for only specific clients:						
Notes (Private):						
			//			
Goto Bill Number after update:						
Monitor Bill						

The Associated sections allow you to assign bills to one or more Topics/Clients or Issues and also indicated the number of each currently assigned. Priority is an optional relative measurement of the significance of the bill. If Highlight is set to Yes then the bill will be color highlighted on reports.

The text area for Notes allows you to record freeform notes and internal annotations for the bill. The Prior Notes section exists if there have been previous notes added to the bill and shows the historical record. Optionally notes may be created for only specific clients instead of a general bill note. This allows custom Topic/Client information to be included on reports.

Monitor Bill – Adds the current bill to your monitoring list with the information provided in the Tracking Information form.

When viewing a bill already on your monitoring list the submit options will change to the following:

Update Information - Saves changes made to Tracking Information form.

Update & Next Unassigned – Saves changes and advances to the bill detail page of the next bill on your monitoring list that has not been assigned to any Topic/Client or Issue areas.

Stop Monitoring Bill - Removes the bill from the monitoring list.

Optionally you may specify a bill number in Goto Bill Number to immediately jump to that bill detail page after the save, though this is restricted to bills from the same state as the current bill being edited.

### **My Bills List**

Upon login to the system or selecting the My Bills link in the navigation menu you will be presented with your monitored bills list.

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Alert	Pri	Stance	State	Bill Number	Summary/Title	Date▼	Action
▲	9	8	СТ	HB05054	To make minor and technical changes to Department of Consumer Protection statutes to reduce unnecessary paperwork, increase the efficiency of agency processes, comply with federal law, conform to customary practices and remove or update antiquated pr Read more	2012-02-14	To Joint General Law Committee
	6	✓	MI	HB5382	Appropriations; zero budget; general government; provide for fiscal year 2012- 2013. Creates appropriation act.		To House Appropriations Committee
	1 OR HB4121 Relating to wineries sited in exclusive farm use zones; declaring an emergency.		2012-02-14	To House Agriculture and Natural Resources Committee			
	2	✓	IN	SCR0004	A Senate Resolution memorializing Galen Goode.	2012-02-13	Returned to the Senate

This presents you with a high level overview of the bills on your monitoring list, by default sorted by date so the most recent actions are presented first. However the results can be sorted by many of the columns available.

The Alert column is indicative of bills that have been set to highlight. The Pri column shows the recorded priority. The Stance column is an iconic representation of the stance. The State column lists the state the bill resides in. The Bill Number column is the actual bill number. The Summary/Title provides the description of the bill scope. The Date column is the date of last action. Finally the Action column is the actual last recorded action on the bill.

### **Insights Bill Browser**

The Insight browser is the common bill browser interface, similar to the My Bills list, that aides in identifying relative legislation that may require additional attention and investigation because of relation to other bills being monitored and associated bill information. This interface adds an Insight column to the results to show the disposition of each individual bill. The system provides numerous drilldown paths to allow more detailed research as indicated by most any red color link. Examples include pending committee cross reference, subjects, sponsors, code citations and search results.

The key legend to the various icons encountered in the system is as follows:

- Indicates a bill on your monitoring list that has a supported stance.
- 8 Indicates a bill on your monitoring list that has an opposition stance.
- Indicates a bill on your monitoring list that has no stance.
- Indicates a bill that is not being monitored but may be relevant based on the current drilldown view.
- 🔔 Indicates that the bill has been highlighted.

Nvailable in most cross-reference and drilldown views that links to a private RSS feed for the current view.

### **Bill Detail Pages**

To make the process more streamlined GAITS uses the same format and presentation for all legislative data across America instead of having to deal with 50 separate interfaces.

Legislative Detail: WV House Bill 4012 - 2012 Regular Session West Virginia HB4012 Recommend +1 < 0 in Share Tweet {0 WV Legislature Page for HB4012 - [Resync Bill] 2012/02/21 03:35 - PermaLink Summary Sponsors Texts Votes Research Priori Comments (0)

Each bill detail page contains a common header and set of tabs for exploring deeper detailed information. You can utilize the social media functions to share the bill with associates and others in your social circle. Also included for each bill is a link back to the original state legislative page for the bill as a fallback feature and extraneous data. Under certain conditions users will be able to force a Resync Bill to ensure the information is as current as possible. A PermaLink is also available to be able to link to the bill directly as current session bills use a shorthand URL notion to access.

Summary – The principle summary page listing current bill text, status, title and description, sponsors, full history. Same as/similar to bills, subject index and code citation references are also listed for states where these features are supported.

Sponsors – Listing each sponsor of the bill and a drilldown link to view all other bills sponsored by each individual.

Texts – Listing of all the drafts and versions of the bill text which can be read or downloaded, some bills are only available in formats that will require additional software such as PDF and Word Doc files.

Votes – Listing and summary of any roll call vote information for the bill on file and a detail view of individual vote records for each member.

Research – A utility page automating various Google Web & News searches for different aspects of the bill; and where applicable.

Priori – Lists all incarnations of this particular bill number across current and prior sessions on record to easily find historical details for a piece of legislation.

Comments – A section for public commentary on the bill where you can make your opinion and voice heard.

# **Bill Detail Samples**

### **Summary**

Summary Sponsors Texts Votes Research Priori Comments (0)

#### Status

View latest bill text (Comm Sub) [HTML] Pending Senate Government Organization Committee February 14 2012 - To Government Organization

#### Summary

Removing the Commissioner of the Bureau for Public Health from certain boards

- Tracking Information -

#### Title

Removing the Commissioner of the Bureau for Public Health from certain boards

#### Sponsors

Del Martin	Del Morgan	Del Swartzmiller	Del Manypenny
Subjects			
Boards and Commi	ssions		
Health (And Related	l Subheadings)		
Roll Calls			
2012-02-13 - Effect	ive from passage (Roll No. 42) (Y: 97 N: 0	NV: 3) [PASS]	
2012-02-13 - Passe	d House (Roll No. 41) (Y: 97 N: 0 NV: 3) [	PASS	
History			
2012-02-14 - To Go	overnment Organization		
2012-02-14 - Introd	duced in Senate		
2012-02-14 - House	e Message received		
2012-02-13 - Comr	nunicated to Senate		
2012-02-13 - Effect	ive from passage (Roll No. 42)		
2012-02-13 - Passe	d House (Roll No. 41)		
2012-02-13 - Read	3rd time		
2012-02-13 - On 3r	d reading, Special Calendar		
2012-02-10 - Read	2nd time		
2012-02-10 - On 2r	nd reading, Special Calendar		
2012-02-09 - Read	1st time		
2012-02-09 - From	House Calendar, 1st reading, placed on S	pecial Calendar	
2012-02-08 - By su	bstitute, do pass		
2012-01-12 - To Ho	ouse Government Organization		
2012-01-12 - Introd	duced in House		
2012-01-12 - To Go	overnment Organization		
2012-01-12 - Filed f	for introduction		

### Votes

Summary	Sponsors	Texts	Votes	Research	Priori	Comment	s (O)				
Vote					Date		Yea	Nay	NV	Abs	
Effective from		oll No. 42	\ \		2012-02	-13	97	0	3	0	

Effective from passage (Roll No. 42)	2012-02-13	97	0	3	0
Passed House (Roll No. 41)	2012-02-13	97	0	3	0

### **Roll Call Details**

Summary	Sponsors	Texts	Votes	Research	Priori	Comments (0)				
Vote: Pass Yea: 97 Nay: 0 NV: 3 Absent: 0	sed House	e (Roll	No. 41)							
Result: Passe	d									
Name						Yea	Nay	Not Voting	Absent	
Name Del. Anderso	n					Yea 🗸	Nay	Not Voting	Absent	
Name Del. Anderso Del. Andes	n					Yea	Nay	Not Voting	Absent	
Name Del. Anderso Del. Andes Del. Armstea	on					Yea ✓ ✓	Nay	Not Voting	Absent	
Name Del. Anderso Del. Andes Del. Armstea Del. Ashley	on ad					Yea ✓ ✓ ✓	Nay	Not Voting	Absent	

### Research

Summary Sponsors Texts Votes Research

Priori Comments (0)

#### Subjects

Boards and Commissions Health (And Related Subheadings)

#### Online References

Search Phrase	Web	News	Financial
[West Virginia HB4012]	Google Web &	Google News 🖗	
[Delegate Dale Martin WV]	Google Web 🖗	Google News 🖗	FollowTheMoney 🗗
[Delegate Jim Morgan WV]	Google Web &	Google News 🖗	N/A
[Delegate Randy Swartzmiller WV]	Google Web 🖗	Google News 🖗	FollowTheMoney 🗗
[Delegate Mike Manypenny WV]	Google Web &	Google News &	FollowTheMoney 🗗

#### Code Citations

Chapter	Article	Section	Citation Type	Statute Text
16	1	7	Amended Code	Statute Text 🖉
30	16	4	Amended Code	Statute Text 🗗
30	23	5	Amended Code	Statute Text 🖉
30	26	3	Amended Code	Statute Text 🗗
30	26	4	Amended Code	Statute Text 🖉

### **Email Alerts**

Alerts are designed to allow you to stay informed about changes to bills on your My Bills monitoring list or results from Saved Searches. These settings are available using the My Alerts link accessible in the navigation menu. You can select the frequency of the updates and what format you wish to receive in the email. Setting Alert Frequency to Never will disable alerts entirely, Daily Updates will report on changed bills each weekday morning, Weekly Summary will schedule an email either on Monday or Friday morning that will summarize your entire My Bills list with current status information. The Alert Notification Destination controls who receives the report, currently the only option available is the Default Group Contact. The Alert Format can either be a basic HTML document or an attached PDF report.

#### eLobbyist Alerts

Alerts allows you to control if and when you receive email alerts for updates from bills on your monitoring list or saved searches.

▽ Monitored Bill Alert Settings

#### **Alert Frequency:**

- Alerts disabled
- Daily Updates (Mon-Fri)
- Weekly Summary (Monday)
- Weekly Summary (Friday)

Note: Alerts run at approximately 6AM Eastern Time.

#### Alert Notification Destination:

Default group contact

Email address that will recieve notifications for monitored bills.

#### Alert Format:

- HTML
- PDF

Format of email alerts, PDF files will be sent as attachments.

Saved Search Alert Settings

#### **Alert Frequency:**

- Alerts disabled
- Daily Updates (Mon-Fri)
- Weekly Summary (Monday)
- Weekly Summary (Friday)

Note: Alerts run at 6AM Eastern Time.

#### Alert Notification Destination:

#### Default group contact

Email address that will recieve notifications for saved search alerts bills.

#### Alert Format:

- HTML
- PDF

Format of email alerts, PDF files will be sent as attachments.

### **Full Text Search**

One of the most powerful features of GAITS is the full text search engine into the national legislative database. Searches can be performed on an individual state or across all states for the current biennium session or on historical records. While keyword searches on the highly variable bill data and text is not without issue, a significant amount of effort has been put into the backend technology and available ways to construct searches to return highly relevant results. In some cases it is a matter testing alternate parameters to obtain a high signal to noise ratio. The details of options are beyond the scope of this document but more information can be found at <a href="https://legiscan.com/fulltext-search">https://legiscan.com/fulltext-search</a>.

eLobbyist Search
State: All States Select a state or national search.
Bill Number:
Find an exact bill number. [help]
Full Text Search:
Search bill text and data. [help]
Sessions:
Ourrent (2012)
Prior (2011)
Recent (2012-2011)
© All
Search Reset

Select the State you wish to search, or select All State for a national search. Then enter either a Bill Number or a query string in the Full Text Search area (it is not advisable to enter information in both fields since it is less likely to return a quality result). Optionally select which Sessions group you want to search, then click Search.

Please note when searching Current year, most state legislatures run in biennium, which means the legislative session spans two years and results may contain results from the previous calendar year. In most cases these bills are still valid and may continue to progress through the legislative process.

### **Search Results**

The output of search results is very similar to the standard bill browser interface with the addition of the Relevance column which is a measure of how relative the bill is to each individual search parameters. Results also include the

#### Insight indicator to quickly identify monitored bills and stances and those bills that are not being monitored.

#### Save Search

Insight	State	Bill Number	Relevance	Summary/Title	Date	Action
0	TN	HB1477	100 %	As introduced, enacts the "Tax Increment Financing Act of 2011." - Amends TCA Title 7, Chapter 53; Title 9; Title 13, Chapter 20 and Chapter 987 of the Public Acts of 1998. HB1477 Bill Detail	2011-05-04	Taken Off Notice For Cal. in s/c Finance Subcommittee of Finance, Ways & Means Committee
٩	IN	HB1088	99 %	Allows a county to use an additional county adjusted gross income tax rate or county option income tax rate to reduce all property tax levies imposed by the county by granting property tax replacement credits against those property tax levies to all HB1088 Bill Detail	2012-01-09	To House Ways and Means Committee

### **Saving Searches**

Available on each search result page is the option to Save Search which allows you to store the search parameters and optionally create a private RSS feed for the results. The system selects a default Search Name, though you are free to change this to any preferred freeform description. Additionally there is an area to control Alert settings for each individual Saved Search, if you select to include the search in email alerts; you will also need to ensure that your search alert settings under the My Alerts menu option are also enabled. You may choose Generate alert when a new bill appears in the search results, an existing bill in the search results change, or both.

To help control the alerts you may also specify a relevancy cutoff for how My Alerts manage search result tracking. Only bills with the specified relevance score or higher, up to a maximum of 200 bills per search, will be tracked out of each search result set.

# eLobbyist Save Search

Search Name/Description:	
Health Care Search (National)	
Create a dynamic private RSS feed f	or search:
Yes	
◎ No	
Include search in alert notification	is:
O Yes	
No	
NOTE: The first alert will be the entire matching	ng result set, new/change rules will take effect subsequently
Generate alert when:	
New bills appear	
Changed bills are detected	
Both new and changed bills	
Control when a bill from search results will be	included in alert
Include only results with a relevan	ice score higher than:
90 %	
Alert tracks maximum of 200 bills or relevan	ce cutoff per search, whichever comes first

### **Saved Searches**

The previously saved searches are available through the My Searches link in the navigation menu. From here you can edit the search by clicking on the name in the Search column. The search can be executed immediately via the View link in the View Results column. The Alerts column indicates if this search is being monitored for email alerts. And if a RSS Feed was created for the search it is also presented. To remove the search from your list and invalidate any existing RSS simply select the Delete link.

#### eLobbyist Saved Searches

Saved searches allow you to store commonly used search parameters to conveniently execute them against the national legislative database. You may optionally create a private RSS feed for the search results.

Search	View Results	Alerts	RSS Feed	Delete
Health Care Search (National)	View	No	http://e-Lobbyist.com/gaits/feed/8fbab4a59c79f2f15c445068d31322e5.rss	Delete
Tax Search (WV)	View	Yes	http://e-Lobbyist.com/gaits/feed/151386b0be44d92dc1f0df94ee2ae4c4.rss	Delete
Tort Search (WV)	View	Yes	http://e-Lobbyist.com/gaits/feed/982e80b162de0663dce5c97e6e5bf8bb.rss	Delete

It should be noted that search result feeds behave differently than other feeds in the system. If the search results are too broad then some bills deeper in the result set may not have the opportunity to filter close enough to the top in order to appear in the feed. This can be remedied by making more precise search queries or limiting searches to separate states.

### **My Reports**

Outside of monitoring bills, reporting is at the heart of GAITS in order to disseminate and share information whether it is internal to your organization or externally with clients or other concerned parties. To access the reporting system use the My Reports link in the navigation menu. Each individual bill number in the report is also a link to the primary bill detail page at LegiScan so anyone viewing the report can instantly view the most current information, and if logged in as a valid user, immediately modify or amend tracking information.

eLobbyist Reporting						
─ ○ Client Reporting						
→ ▷ Issue Reporting						
Pending Committee Reporting						
- > Sponsor Reporting						
→ ▷ State Reporting						
Custom / Special Reporting						

Topic/Client Reporting – Basic reporting based on current individual Topics/Clients.

Issue Reporting – For dual layer Issue reporting offering similar functionality to first level Client classification but based on currently defined Issue areas.

Pending Committee Reporting – Useful for tracking bills that are currently pending or stalled in a particular committee.

Sponsor Reporting – Reporting on individual sponsors with an additional reference comparing your Stance on each bill compared to what bills the member has sponsored.

State Reporting – Broad overview reporting for entire states or groups of states.

Custom/Special Reporting – By default these are reports that do not fit into other categories such as internal reports and unassigned bills. Also included here will be any special one-off reports requested for your individual account.

### **Custom Reports**

While the reporting options satisfy most user requirements LegiScan recognizes that there may be existing prerequisites or special needs. To that end we do offer a la cart custom report creation, to discuss the options available and pricing please contact <a href="mailto:support@legiscan.com">support@legiscan.com</a> or call 800-618-2750.

### **Report Options and Tuning**

There are various options to help tune the details of the PDF report output for the core reports.

Lobbyist Reporting	
✓ Client Reporting	
Client:	
CLIENT 1 (235 bills)	
CLIENT 2 (227 bills)	
CLIENT 3 (238 bills)	
▽ Report Options and Tuning	
Note inclusion:	
Exclude notes	
Most recent note	
All available notes	
Report Template:	
Normal	
Issue Overview	
Sorting:	
Standard	
Priority	
Highlight	
Page Size:	
Etter (8.5x11)	
© Legal (8.5x14)	
Generate Report	

Note Inclusion – Specifies how notes should be handled in the report output, either Excluded entirely, only including the Most Recent note, or All Available

**Report Template** – Indicates the report template to use, defaulting to the normal tabular format or alternate structure that change the layout and included information.

Sorting – Controls the sorting of output; Standard orders bills by state, then originating chamber and finally bill number; Priority first sorts by priority in descending order then follows standard sorting; Highlight ensures that highlighted bills appear first in reports then proceeds to sort by descending priority and then standard sorting.

Page Size – Selectable output page size between standard letter and legal size paper.

In most of the reporting selections the system also includes the number of matching bills in the parenthetical beside each target option.

### **Report Examples**

Below are samples of possible reports available from the system. All output is generated dynamically at report time to include the most recent information from the system.

### **Client Report**

The standard Topic/Client report with notes included.

### CLIENT 1 eLobbyist Client Report

February 22, 2012

Bill #	Pri	State	Summary	Status	Notes
HB2607	10	AZ	Truth in taxation; computation; rate	2012-01-30 Referred to House RULES Committee	
<u>SB344</u>	10	CA	An act to amend Section 16110 of the Business and Professions Code, relating to local government.	2012-01-31 Returned to Secretary of Senate pursuant to Joint Rule 56.	
<u>SB00047</u>	10	ст	To utilize half of all state budget surpluses for income tax relief by increasing the amount of income that is exempt from income taxation.	2012-02-10 Referred to Joint Committee on Finance, Revenue and Bonding	2012/02/22 - Needs review by legal
<u>SB2675</u>	10	н	Requires county animal control officers to establish a process for permitting and inspecting the premises of dog breeders. Establishes fees for permits and penalties for violators.	2012-01-25 (S) Referred to PGM/JDL, WAM.	
<u>S1250</u>	10	ID	Adds to existing law relating to energy facility siting to require a siting certificate in certain circumstances, to create a siting panel, to provide authority and responsibilities of the panel, to provide for an application for a siting certificate, to provide duties of an applicant upon submittal of an application and to provide duties of the Public Utilities Commission upon receipt of an application.	2012-01-23 to St Aff	2012/02/22 - Internal opinion
HB0820	10	IL	Amends the Burn Injury Reporting Act. Makes a technical change in a Section concerning the short title.	2011-04-15 Rule 19(a) / Re-referred to Rules Committee	
<u>SB0006</u>	10	IN	Removes a provision that makes it a Class B misdemeanor for a person to manufacture, possess, display, offer, sell, lend, give away, or purchase certain knives with blades that opens automatically.	2012-01-31 First reading: referred to Committee on Public Policy	

### **Client Issue Overview Report**

An alternate view in dual layer tracking that summarizes each issue for a Client in each state.

#### Indiana Issue Overview Report CLIENT 1 February 22, 2012

Environment	Health Care	Technology
(Support)	(No Stance)	(Support)
SB0223 2012-02-09 First reading: referred to Committee on Public Health State department of health matters.	HR0006 2012-01-13 First reading: adopted voice vote Honoring Dr. Ed Eiler, Lafayette school superintendent, on his retirement.	SCR0004 2012-02-13 Returned to the Senate A Senate Resolution memorializing Galen Goode.
(No Stance)		(Oppose)
HB1273 2012-02-01 First reading: referred to Committee on Judiciary Administrative law judge study.	(Support) SB0223 2012-02-09 First reading: referred to Committee on Public Health State department of health matters.	SB0006 2012-01-31 First reading: referred to Committee on Public Policy Knives with automatic blades.
	enter and the second second	(No Stance)
	(Support) SB0371 2012-02-13 First reading: referred to Committee on Veterans Affairs and Public Safety Emergency medical services matters.	HB1273 2012-02-01 First reading: referred to Committee on Judiciary Administrative law judge study.
	(No Stance) HB1273 2012-02-01 First reading: referred to Committee on Judiciary Administrative law judge study.	

### **Pending Committee Report**

Report for bills on monitoring list that are currently pending action in a particular state chamber committee.

#### Illinois House of Representatives Rules

eLobbyist Committee Report

February	22,	2012

Bill #	Committee Summary		Status
<u>HR0229</u>	<u>HR0229</u>	Urges the Department of Central Management Services (i) to compile a list of members of State boards and commissions who receive healthcare benefits through the State Employees Group Insurance Plan and (ii) to report its findings to the Governor and General Assembly within 30 days after the adoption of the resolution.	2011-04-11 Added Co-Sponsor Rep. Chapin Rose
<u>HB0820</u>	<u>HB0820</u>	Amends the Burn Injury Reporting Act. Makes a technical change in a Section concerning the short title.	2011-04-15 Rule 19(a) / Re-referred to Rules Committee
<u>HB1270</u>	<u>HB1270</u>	Creates the Toxic Chemical Safety Act. Requires the Director of the Illinois Environmental Protection Agency to publish a list of chemicals of high concern. Authorizes the Director to designate chemicals of high concern and other chemicals as priority chemicals. Requires the Director to report certain information about the designation process to the General Assembly. Requires each manufacturer and distributor of children's products that contain designated chemicals to provide certain information to the Director. Authorizes the Director, under certain circumstances, to prohibit, by rule, the sale and distribution of children's products containing a priority chemical. Requires manufacturers and distributors whose products are subject to one of these rules to file a compliance plan. Authorizes manufacturers and distributors to apply for, and the Director to grant, waivers from these rules. Exempts certain classes of chemicals, persons, and containers. Authorizes the Director to participate in an interstate clearinghouse to promote chemical safety. Authorizes the Director to request certificates of compliance from manufacturers and distributors. Requires the Director to develop certain educational materials. Creates the Advisory Council on Toxic Substances to provide expert and scientific advice to the Director. Authorizes the Director to adopt rules necessary to implement these provisions.	2011-04-15 Added Chief Co-Sponsor Rep. Patrick J. Verschoore

### **Sponsor Report**

Report for an individual bill sponsor with a comparative indication of sponsorship versus the Stance on those bills.

### eLobbyist Sponsor Report: Bonnie Lowenthal - California

Support: 0 (0%) Oppose: 1 (100%) No Stance: 2

February 22, 2012

Bill #	Summary	Status
ACR89	Relative to the Lunar New Year celebration.	2012-01-24 In Senate. To Com. on RLS.
<u>AB218</u>	An act to amend Section 14302 of, to add Section 6377.1 to, to add Part 9 (commencing with Section 15000) to Division 2 of, and to repeal Section 13301 of, the Revenue and Taxation Code, relating to taxation, and calling a special election to be consolidated with the next statewide general election, to take effect immediately as an act calling an election.	2012-02-01 Died pursuant to Art. IV, Sec. 10(c) of the Constitution. From committee: Filed with the Chief Clerk pursuant to Joint Rule 56.
<u>AB510</u>	An act to amend Sections 115111, 115112, and 115113 of the Health and Safety Code, relating to public health.	2012-01-26 In Senate. Read first time. To Com. on RLS. for assignment.

### **State Report**

Report for a complete state by state overview of monitored bills.

#### eLobbyist State Report

New York

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Bill #	Sponsors	Summary	Status
<u>A02638</u>	Dennis H. Gabryszak, Donna A. Lupardo, William B. Magnarelli, Joan L. Millman, Joseph D. Morelle, Robin Schimminger, Philip A. Palmesano	Creates the qualified emerging technology commercialization tax credit; eligible taxpayer shall receive a credit for 15 percent of qualified commercialization expenses.	2012-01-04 referred to ways and means
A04823	Audrey I. Pheffer, Peter M. Rivera, Lou Tobacco, Naomi Rivera, Eric A. Stevenson	Provides that drug utilization review and the preferred drug program shall not apply to certain drugs.	2012-01-04 referred to health
<u>A06384</u>	Michael Miller, J. Gary Pretlow	Extends expiration date for contributions of an additional 1% of purse money.	2012-01-09 committed to racing and wagering
A06849	Peter J. Abbate, Jr.	Grants police officer status to members of the uniformed correction force of NYC department of correction.	2012-01-04 referred to codes
<u>S00439</u>	Krueger, Liz	Establishes a kitchen incubator/shared-use kitchen facility program within the urban development corporation; provides grant funding to local development corporations, municipalities, educational institutions and not-for-profit entities for the development or expansion of kitchen incubator/shared-use kitchen facilities which make available services such as food production, technical assistance, business management and marketing, distribution, storage and retailing assistance, particularly in economically distressed areas.	2012-01-04 REFERRED TO CORPORATIONS, AUTHORITIES AND COMMISSIONS

### **Internal Client Report**

An internal overview report for each bill and which Topics/Clients are associated.

#### Internal Client Report

February 22, 2012

Bill #	State	Clients	Sponsors	Summary	Status
<u>HB95</u>	AL	CL1, CL2, CL3	Johnson (R)	Law enforcement officers, death and disability benefits for municipal police officers, state troopers and certain other state law enforcement officers, extended to all law enforcement officers, definition of occupational disease to include cancer, AIDS, and hepatitis, Secs. 36-30-20, 36-30-21, 36-30-22, 36-30-23 am'd.	2012-02-07 Read for the first time and referred to the House of Representatives committee on Ways and Means General Fund
HB269	AL	CL1, CL3	Millican, Hill, McCutcheon, Love, Gaston, Ball, Williams (J), Fincher, McMillan, Ison, Barton, Clouse, Mask, Sanderford, Galliher, Newton (C), Laird, Boothe, McClurkin, Rich, Collins, Greer, Williams (D), Lee, Weaver, Henry, Long, Nordgren, Johnson (K), Patterson, Johnson (W), Jones, Tuggle	Public assistance, fraud in obtaining, crime established, penalties, theft of services, knowledge requirement deleted, Sec. 13A-8-10 am'd.	2012-02-09 Read for the first time and referred to the House of Representatives committee on Judiciary
<u>HB280</u>	AL	CL1, CL2, CL3	Clouse	State funds, investment of, expanding types of investments eligible for state depositories; Sec. 41-14-30 am'd	2012-02-09 Read for the first time and referred to the House of Representatives committee on Financial Services

### **Unassigned Bill Report**

A utility report to show bills that are on the monitoring list but have not been assigned to any Client/Topic or Issues and the individual user responsible for adding the bill to the monitoring list initially.

# eLobbyist Unassigned Bill Report February 22, 2012

Bill #	State	Responsible	Summary	Status
HJR63	AL	multidemo: 2012/02/22	Harris, Patrick Dewayne, death mourned	2012-02-09 Introduced and referred to the House of Representatives committee on Rules
<u>SJR3</u>	AL	multidemo: 2012/02/22	Myers, Senator Harry E. (Hap), Jr., commended	2012-02-09 Received in House of Representatives and referred to the House of Representatives committee on Rules
<u>SB220</u>	AL	multidemo: 2012/02/22	Class action lawsuits filed in Alabama, plan for undistributed funds to be distributed to Child Abuse and Neglect Prevention Department if class members cannot be located, or if distribution to class is not economically feasible, or if class members do not make a claim to the class funds	2012-02-07 Read for the first time and referred to the Senate committee on Judiciary