

# IOWA ETHICS AND CAMPAIGN DISCLOSURE

How to Use the Web Reporting System

# Create a new period

- ❑ Click “Summary” under Schedules on the left.
- ❑ Click “New Period.”
- ❑ Select the year, click “find periods”, select the period, confirm dates, and save.

The image displays two screenshots of the IECDDB Web Reporting System interface.

**Left Screenshot: DR-2 Summary**

- Header:** IECDDB Web Reporting System
- Left Sidebar:** Admin Menu, DR-2 Summary, Organization, Schedules, Dissolution, Contacts, My Account.
- Main Content:** DR-2 Summary page with tabs for New Period, Filing History, and Summary. The Summary tab is active, showing a table with columns for Starting Balance, Schedule A: Cash Contributions, Schedule F1: Loans Received, Schedule F2: Loans Repaid, and Ending Balance. A blue arrow points to the 'Summary' link in the left sidebar.

**Right Screenshot: Filing Period**

- Header:** IECDDB Web Reporting System
- Left Sidebar:** Admin Menu, Organization, Schedules, Dissolution, Contacts, My Account.
- Main Content:** Filing Period page. It includes a 'Year at Beginning of Period' dropdown set to 2009, a 'Filing Period' dropdown set to July 1 through December 31, and a 'Find Periods' button. Below these are fields for 'Period Beginning Date' (7/1/2009), 'Period Ending Date' (12/31/2009), 'Filing Deadline Date' (1/19/2010), and 'Adjusted Filing Deadline'. A 'Save' button is at the bottom.

# Adding Transactions

- Under “Schedules”, click contribution, expenditures, debt, etc.
- Click new contribution, expenditure, etc., select the type from the drop-down and complete the information. If it is a registered committee, you will be able to use type “committee” and enter the committee number or part of the committee name and select it from the list in the system.
- Unitemized receipts and lump sum donations are listed as type “unitemized” and require affirmation that internal records are kept and contributions that need to be disclosed are reported separately.

The image displays three screenshots of the IECDB Web Reporting System interface, illustrating the steps to add transactions.

**Left Screenshot: DR-2 Summary**  
 The left sidebar shows the "Schedules" menu with "Contributions" highlighted. The main content area displays the "DR-2 Summary" page, which includes a table of financial data:

Summary	Amount
Starting Balance	\$89,768.36
Schedule A: Cash Contributions	\$187,851.92
Schedule F1: Loans Received	\$0.00
Schedule H2: Campaign Property Sales	\$0.00
<b>SubTotal</b>	<b>\$277,620.28</b>
Schedule B: Expenditures	\$28,756.00
Schedule F2: Loan Repayments	\$0.00
<b>Ending Balance</b>	<b>\$248,863.48</b>

**Middle Screenshot: Schedule A - Contributions**  
 The middle screenshot shows the "Schedule A - Contributions" page. A blue arrow points to the "New Contribution" link in the top navigation bar. The page displays a summary of contributions for the current filing period.

**Right Screenshot: New Contribution Form**  
 The right screenshot shows the "New Contribution" form. A blue arrow points to the "Contributor Type" dropdown menu, which is set to "Individual". A blue star is placed over the "Explanation" text area. The form includes fields for Contributor, Date, Amount, Check Number, and various checkboxes for contribution types (From Fund Raiser, Candidates Own Funds, Interest, Unitemized, Reverse). A "Save Contribution" button is at the bottom.

# Transactions with Purpose

- ❑ Some schedules require you to describe the transaction (expenditure, in-kind, debt) and a drop-down is provided for that purpose.
- ❑ Select the description that best describes your transaction or select “other” and provide additional description when required.
- ❑ To learn what the type is used for and whether more explanation is needed, click on the Blue question mark next to the type.

**IECDB Web Reporting System**

**Schedule B - Expenditures**

**Admin Menu**  
Manual Registration  
Manual Filing  
Certify DB3  
Manage OTC  
Manage PTD  
Lobbyist Client  
Lobbyist Firm  
Review Account  
DR-1/Other Users  
Reset Password  
Period Main  
Help Pages  
Transaction Import  
Search  
Authorization  
Letters

**Organization**  
Committee  
Treasurer  
Chairperson  
Candidate  
Bank Accounts

**Schedules**  
Summary  
Contributions  
Expenditures  
Debt  
In Kind  
Loans Received  
Loans Repaid  
Consultant  
Inventory  
Property Sales

**Dissolution**

**Contacts**  
Add  
View/Edit

**My Account**  
Settings  
Logout

**Schedule B - Expenditures**  
New Expenses Filing History Search Import  
Begin Dt: 7/01/2009 Ending Dt: 12/31/2009 Filing Due Dt: 1/19/2010 Adjusted Due Dt:  
Last Changed: 12/16/2009 3:16:05 PM Changed By: mvanwyk  
No Expenditures are listed for this filing period or meet your criteria.

**Organization**  
Committee  
Treasurer  
Chairperson  
Candidate  
Bank Accounts

**Schedule B - Expenditures**  
New Expenses Search Import  
Format for an Individual must be 'LastName, FirstName MI'

Payee Type: Individual \* Address: \*  
Payee: \* Address: \*  
Date: \* City: \*  
Expense Type: Printing & Reproduction \* State: -- Select State -- \*  
Amount: \*  
Check Number: \*  
Explanation: \*  
Earmarked ☐

Indicate and describe what was printed or reproduced, such as flyers or yard signs. PAC committees should indicate the candidate benefited or issue presented, if applicable.

View [Committee Listings](#) on IECDB web site.

\* = Required

# Consultants

- ❑ To disclose third party arrangements with a consultant, under “Schedules,” click “Consultant”.
- ❑ To add the consultant click on “New” consultant and complete the required fields. If it was “pay as you go” rather than a contractual agreement, enter the reporting period dates as the contract dates and the total expended during the period as the contract amount.
- ❑ To enter the sub vendor information, i.e., payments made by the consultant on behalf of the committee for advertising, click on “expenses” in the Edit column and “New consultant expense.” Enter the information about the sub vendor/advertiser.

The screenshot displays the IECD Web Reporting System interface. The main window is titled "Schedule G - Consultant Expense" and includes a navigation bar with links: "New Consultant Expenses", "Back To Expense List", and "Search". The user is identified as "Public4m" and is "Testing for Statehouse".

The left sidebar contains a menu with the following items:

- Organization
  - Committee
  - Treasurer
  - Chairperson
  - Candidate
  - Bank Accounts
- Schedules
  - Summary
  - Contributions
  - Expenditures
  - Debt
  - In Kind
  - Loans Received
  - Loans Repaid
  - Consultant
  - Inventory
  - Property Sales
- Dissolution
- Contacts
  - Add
  - View/Edit
- My Account
  - Settings
  - Logout

The main content area is divided into two sections. The top section, "Schedule G - Consultants", includes a "New Consultant" button and a search bar. Below this, a form is displayed for adding a new consultant. The form includes fields for:

- Consultant Type (dropdown menu)
- Consultant (text field)
- From Date (calendar icon)
- To Date (calendar icon)
- Compensation (text field)
- Explanation (text area)
- Address (text field)
- City (text field)
- State (dropdown menu)
- Zip (text field)
- Phone Number (text field)

The bottom section, "Schedule G - Consultant Expense", includes a table with the following columns: "From Date", "To Date", "Consultant", "Anticipated Compensation", "Status", and "Edit". The table contains one entry:

From Date	To Date	Consultant	Anticipated Compensation	Status	Edit
1/01/2010	12/31/2010	ABC Advertising Main Street, Anytown, IA, 50000	\$10,000.00	Original	<a href="#">Edit</a>   <a href="#">Delete</a>   <a href="#">Expenses</a>

The bottom of the page features a footer with the text: "Iowa Ethics Campaign Disclosure Board, Copyright ©2010, All rights reserved."

# Filing your Report

- ❑ DO NOT SUBMIT until you are ready to file the report. Use Log out (under My Account) to leave and come back as often as you want for updating prior to due date.
- ❑ You can file your report in 2 ways: click on either File Report button and it will ask you to confirm that you really want to file it.
- ❑ It will then take you to a new page that will confirm

The image shows two screenshots of the IECD Web Reporting System interface. The left screenshot displays the 'DR-2 Summary' page for the 'SEIU Political Education and Action Iowa Fund'. It includes a sidebar with an 'Admin Menu' and a main content area with a 'Summary' table and a 'General Assets and Liabilities' table. A blue arrow points from the 'File Report' button in the left screenshot to the 'DR-2 Submit' page on the right. The right screenshot shows the 'DR-2 Submit' page, which includes a 'Filing History' section and a 'Click Here to create your next filing period.' link. A blue arrow points from the 'File Report' button in the left screenshot to the 'DR-2 Submit' page on the right.

**IECD Web Reporting System**

**Admin Menu**

- Manual Registration
- Manual Filing
- Certify DR3
- Manage DTC
- Manage PFD
- Manage IIE
- Manage OIE
- Manage IF DR3
- Lobbyist Client
- Lobbyist Firm
- Review Account
- DR-1/Other Users
- Reset Password
- Period Main
- Help Pages
- Transaction Import
- Search
- Authorization
- Letters

**DR-2 Summary**

User: mvaneyk (Audit)  
SEIU Political Education and Action Iowa Fund

**Filing History** | **File Report** | **Adjust** | **Cascade** | **Penalty** | **Print Report** | **Help** | **Print**

Beginning Dt: 1/01/2009 Ending Dt: 6/30/2009 Filing Due Dt: 7/19/2009 Adjusted Due Dt: 7/20/2009  
File Status: Amended Last Changed: 8/12/2009 10:26:21 AM Changed By: mvaneyk **Adjust**

Summary		General Assets and Liabilities	
Starting Balance	\$256,511.64	Schedule F1: Loans at Start of Period	\$0.00
Schedule A: Cash Contributions	\$0.00	Schedule I2: Unpaid Bills	\$0.00
Schedule F1: Loans Received	\$0.00	Schedule E: In Kind Contributions	\$0.00
Schedule H2: Campaign Property Sales	\$0.00	Schedule F2: Forgiven Loans	\$0.00
SubTotal	\$256,511.64	Schedule F2: Outstanding Loans	\$0.00
Schedule B: Expenditures	\$4,000.00	Schedule G: Consultant Break	No
Schedule F2: Loan Repayments	\$0.00	Schedule H1: Campaign Property	\$0.00
<b>Ending Balance</b>	<b>\$252,511.64</b>		

\* = Amended

**DR-2 Submit**

You have now filed your report. Filed reports are posted to the public view of the web site every hour at a quarter past the hour.

The public view can be accessed using this link: <https://webapp.iecd.iowa.gov/publicview/Intro.aspx>

**Click Here to create your next filing period.**

It is important to do this now as failure to set up the new filing period can result in incorrectly adding information to already filed reports.

**Organization**

- Committee
- Treasurer
- Chairperson
- Bank Accounts
- Parent

**Schedules**

- Summary
- Contributions
- Expenditures
- Debt
- In Kind
- Loans Received
- Loans Repaid
- Consultant
- Inventory
- Property Sales

**Dissolution**

# Amending a Report

- ❑ If not the most recent filing, click on “Filing History.”
- ❑ Select the period you need to correct.
- ❑ Make the change(s).
- ❑ You do not need to submit a filed report again - saving the changes causes it to automatically show as amended.

The screenshot shows the IECDB Web Reporting System interface. The top navigation bar includes the IECDB logo and the text "Web Reporting System". The main content area is titled "DR-2 Summary" and includes a user profile "User: Public4m" and "Testing for Statehouse". The page features a sidebar with navigation links for Organization, Schedules, Dissolution, and Contacts. The main content area displays a summary of the DR-2 report, including a table of assets and liabilities. The table shows a starting balance of \$0.00 and a sub-total of \$0.00. The ending balance is also \$0.00. A note indicates that the report is amended.

Summary		General Assets and Liabilities	
Starting Balance	\$0.00	Schedule F1: Loans at Start of Period	\$0.00
Schedule A: Cash Contributions	\$0.00	Schedule D: Unpaid Bills	\$0.00
Schedule F1: Loans Received	\$0.00	Schedule E: In Kind Contributions	\$0.00
Schedule H2: Campaign Property Sales	\$0.00	Schedule F2: Forgiven Loans	\$0.00
SubTotal	\$0.00	Schedule F2: Outstanding Loans	\$0.00
Schedule B: Expenditures	\$0.00	Schedule G: Consultant Breakdown?	No
Schedule F2: Loan Repayments	\$0.00	Schedule H1: Campaign Property Value	\$0.00
Ending Balance	\$0.00		

\* = Amended

The screenshot shows the IECDB Web Reporting System interface. The top navigation bar includes the IECDB logo and the text "Web Reporting System". The main content area is titled "DR-2 History" and includes a user profile "User: Public4m" and "Testing for Statehouse". The page features a sidebar with navigation links for Organization, Schedules, Dissolution, and Contacts. The main content area displays a table of DR-2 history, showing the period, begin date, end date, due date, adjusted date, filed date, and amended date. The table shows two entries: one for the period "January 1 through May 14" and another for "January 1 through December 31".

Penalty	Year	Period	Begin Date	End Date	Due Date	Adjusted Date	Filed Date	Amended Date
No	2010	January 1 through May 14	1/1/2010	5/14/2010	5/19/2010			
No	2009	January 1 through December 31	1/1/2009	12/31/2009	1/19/2010		1/5/2010 2:22:47 PM	

# Statement of Organization

- Under Organization, click information to be updated such as “Treasurer.”
- Make the changes and click on “Save and Continue.” Make any other changes and click “Save and Continue.”
- Finally, click on “File Amended DR-1” to save all changes.

The screenshot shows the 'DR1 - Treasurer' form in the IECDB Web Reporting System. The left sidebar contains a navigation menu with links: Organization, Schedules, Dissolution, Contacts, and My Account. The main content area is titled 'DR1 - Treasurer' and includes a 'Filing History' dropdown showing 'Amended On: 1/5/2010 1:38:19 PM'. Below this, there are input fields for 'First Name' (Jane), 'MI' (Q), 'Last Name' (Public), 'Email', 'Phone Number' (000-222-0000), 'Address' (5012), 'City' (des moines), 'State' (IA), and 'Zip' (50000). A 'Save and Continue' button is at the bottom. The footer indicates 'Iowa Ethics Campaign Disclosure Board, Copyright ©2010, All rights reserved'.

The screenshot shows the 'DR-1 Amend' form in the IECDB Web Reporting System. The left sidebar contains a navigation menu with links: Organization, Schedules, Dissolution, Contacts, and My Account. The main content area is titled 'DR-1 Amend' and includes a message: 'If all changes have been made, please click "File Amended DR-1". If you are not done updating your information please continue to do so. If changes are not amended changes will be lost upon logging out.' Below this message are two buttons: 'File Amended DR-1' and 'Delete Changes'. The footer indicates 'Iowa Ethics Campaign Disclosure Board, Copyright ©2010, All rights reserved'.

# Dissolving or Closing

- ❑ Click on Dissolution.
- ❑ Read statements to verify you are ready to dissolve.
- ❑ If ready to dissolve, enter dissolve date and click on Submit.
- ❑ You will be informed that the Dissolution has been filed.

The screenshot shows the IECDB Web Reporting System interface. The top navigation bar includes the IECDB logo and the text "Web Reporting System". The left sidebar contains a menu with links: Organization, Committee, Treasurer, Chairperson, Candidate, Bank Accounts, Schedules, Summary, Contributions, Expenditures, Debt, In Kind, Loans Received, Loans Repaid, Consultant, Inventory, Property Sales, Dissolution, Contacts, Add, View/Edit, My Account, Settings, and Logout. The main content area is titled "DR3 - Dissolution" and includes a "Print DR-3" button. The text states: "If all of the statements listed above have been met, then you may continue submitting this DR3. Statewide/General Assembly candidates, state PACs, and state parties must submit a copy of the final bank statement as soon as possible." Below this, there is a "Dissolve Date" field with a calendar icon and a "Submit" button. The footer of the page reads "Iowa Ethics Campaign Disclosure Board, Copyright ©2010. All rights reserved."

This screenshot shows the same IECDB Web Reporting System interface, but with a confirmation message. The top navigation bar includes the IECDB logo and the text "Web Reporting System". The left sidebar contains a menu with links: Organization, Committee, Treasurer, Chairperson, Candidate, Bank Accounts, Schedules, Summary, Contributions, Expenditures, Debt, In Kind, Loans Received, Loans Repaid, Consultant, Inventory, Property Sales, Dissolution, Contacts, Add, View/Edit, My Account, Settings, and Logout. The main content area is titled "DR3 - Dissolution" and includes a "Print DR-3" button. The text states: "If all of the statements listed above have been met, then you may continue submitting this DR3. Statewide/General Assembly candidates, state PACs, and state parties must submit a copy of the final bank statement as soon as possible." Below this, there is a "Dissolve Date" field with a calendar icon and a "Submit" button. The footer of the page reads "Iowa Ethics Campaign Disclosure Board, Copyright ©2010. All rights reserved."

# Tips

- ❑ Order your transactions by date, name, or amount by clicking on that field heading in the schedule.
- ❑ Click on blue question marks in the system for additional HELP.
- ❑ Complete HELP text is available on our web site under “Electronic Filing.”
- ❑ Use “Search” to sort transactions on a schedule in various ways:

The screenshot shows the IECDDB Web Reporting System interface for Schedule A - Contributions. The top header includes the IECDDB logo, the text "Web Reporting System", and the Iowa state seal. The user is identified as "User: Public4m Testing for Statehouse". The left sidebar contains navigation links: Organization (Committee, Treasurer, Chairperson, Candidate, Bank Accounts), Schedules (Summary, Contributions, Expenditures, Debt, In Kind, Loans Received, Loans Repaid, Consultant, Inventory, Property Sales), Dissolution, Contacts (Add, View/Edit), and My Account (Settings, Logout). The main content area for Schedule A - Contributions includes tabs for "New Contribution", "Search", and "Import", along with "Help" and "Print" links. The "Limit by Contribution Type" section has a dropdown menu set to "Individual" and radio buttons for "Used" (selected) and "Not Used". The "Limit by Date" section has a date input field and radio buttons for "Before", "After", and "Not Used" (selected). The "Limit by Amount" section has an amount input field and radio buttons for "Greater", "Less", and "Not Used" (selected). The "Limit by Status" section has radio buttons for "Original", "Amended", "Adjusted", and "Not Used" (selected). The "Limit by Other Options" section has checkboxes for "From Fund Raiser", "Candidates Own Funds", "Interest", "Unitemized", and "Reverse". A "Find Contributions" button is at the bottom.

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The screenshot shows the IECDDB Web Reporting System interface for Schedule B - Expenditures. The top header includes the IECDDB logo, the text "Web Reporting System", and the Iowa state seal. The user is identified as "User: Public4m Testing for Statehouse". The left sidebar contains navigation links: Organization (Committee, Treasurer, Chairperson, Candidate, Bank Accounts), Schedules (Summary, Contributions, Expenditures, Debt, In Kind, Loans Received, Loans Repaid, Consultant, Inventory, Property Sales), Dissolution, Contacts (Add, View/Edit), and My Account (Settings, Logout). The main content area for Schedule B - Expenditures includes tabs for "New Expenses", "Search", and "Import", along with "Help" and "Print" links. The "Limit by Payee Type" section has a dropdown menu set to "Individual" and radio buttons for "Used" (selected) and "Not Used". The "Limit by Date" section has a date input field and radio buttons for "Before", "After", and "Not Used" (selected). The "Limit by Amount" section has an amount input field and radio buttons for "Greater", "Less", and "Not Used" (selected). The "Limit by Status" section has radio buttons for "Original", "Amended", "Adjusted", and "Not Used" (selected). A "Find Expenditures" button is at the bottom.

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