LobbyGov with AI

User Guide

app.lobbygov.com

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About this guide

This guide covers LobbyGov with AI, the primary LobbyGov platform, at app.lobbygov.com. It is organized by topic area. The Contents pages list every article under its topic, and the Index at the back lists articles and their main headings alphabetically.

If you are moving over from LobbyGov Legacy (portal.lobbygov.com), start with "Coming from LobbyGov Legacy" in Getting Started.

For help, visit support.lobbygov.com or email support@lobbygov.com.

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Getting Started

First steps, the dashboard, and where Legacy features live now.

The Dashboard: your day at a glance

Your day at a glance: what changed on your bills, what's coming up, and what needs a decision. Each box is a tile. Click a tile's title for a one-line description of it.

Where to find it

Click **Dashboard** at the top of the left menu. What you see depends on your role and your plan.

Choosing your tiles

- **Customize**, at the top right, picks which tiles you see and in what order. Your choice is yours alone; it doesn't change anyone else's dashboard.
- Tiles follow the current session of your account's main state.

The tiles

- **Since you were last here** is what changed on your bills since your last visit.
- **Needs review** lists bills a keyword or statute found since you last looked. **Track** puts the bill on a list; **Dismiss** clears it from here. The tile's links open the full list of matches.
- **Watch list** shows the bills you're watching this session. Bills you watched in earlier sessions are listed underneath by session. Only you can see your watch list.
- **Tracked bills** is every bill on the lists you can see, with your account's position and priority. Search it, or filter by client.
- **Tracking lists** shows your clients and their lists, with how many bills are on each and how many of those are dead.
- **Today & tomorrow** shows committee meetings, with your tracked bills marked on each agenda.
- **Cutoff risk** shows your bills facing a cutoff in the next week. A bill that misses its cutoff is usually dead for the session.
- **Awaiting a floor vote** shows your bills in Rules, waiting for floor time.
- **Newly introduced** is the daily list of what was filed, before anyone has tracked it.
- **Session status** shows where the legislature is in its calendar and how long until the next cutoff.
- **How your bills finished**, after a session closes: enacted, vetoed, or did not pass.
- **Recently viewed** is the last few bills, legislators, committees and code sections you opened.

Coming from LobbyGov Legacy

This was the **Dashboard**. Your watch list, tracking lists and dashboard choices came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Coming from LobbyGov Legacy: where things are

If you used LobbyGov Legacy, almost everything you relied on is in the all-new LobbyGov with AI, often with a new name or in a new place. This article lists the main changes.

What came over with your account

- Your clients, tracking lists, positions, priorities, categories, comments and notes.
- Your watch list, keywords, statutes and what they had found.
- Your saved reports, schedules, distribution lists and letterheads.
- Your users and their permissions, and your password.
- Your vote cards, custom scorecards and DonorPAC lists.

What you need to switch on again

- **Email notifications**: your old email settings did not carry over, so nothing is sent until you choose what you want under **Settings**, **Notifications**.
- **Scheduled reports** came over paused. Switch each one on under **Reports**, **Schedules**.
- **Two-factor authentication**: turn it on again on your **Profile**.

Where things moved

In LobbyGov Legacy	In LobbyGov with AI
Search Bills and the Watch List page	**Bill Explorer**. Your watch list is **On my watch list** under Filters, or **Watch List** in the menu.
Calendars and the Weekly Planner	**Calendar**. The Weekly Planner is the **List** view.
Statutes & Keywords	**Keywords** and **Statutes**, under Keywords & Statutes
Notification Center	**Notifications** under Settings, plus the bell at the top of every page
Preferences	**Settings**: Categories, Custom Fields, Positions & Priorities, Tracking Lists and Sidebar Folders
Reports: Generate and Weekly Report Settings	**Reports**, **New Report** and the report editor
Reports: Header Images and Distribution Lists	**Report Settings**
Tools & Wizards	**Tools**: Cutoff Wizard, It's Alive! Tool, Scorecards and Export Data
Account Settings: Subusers & Sharing	**Users**, under Users & Access
Account Settings: Your Profile	**Profile**, under Settings

In LobbyGov Legacy	In LobbyGov with AI
Account Settings: Billing Details	Click your name at the bottom of the menu, then **Billing Overview**
donorpac.lobbygov.com	**DonorPAC**, in the same menu as everything else

What is new

- The **RCW & WAC** readers, **Session Insights**, **Coalitions** and **Who Testifies**.
- The **AI Report Builder** (Beta), AI bill summaries and related-bill search.
- The **Notifications** page, which keeps a copy of what LobbyGov sent you.
- The **Sandbox**, a practice copy of your account for training.

Help on every page

Every page in LobbyGov with AI has its own help: click the **How ... works** link at the top of the page. Each article in this help center also ends with a "Coming from LobbyGov Legacy" section for that page.

AI and Your Data

How the AI features work, what they read, and how to turn them off.

How LobbyGov with AI uses AI and your data

LobbyGov uses generative AI from OpenAI in a few optional features, and an account can turn all of them off. The AI is never trained on your data, and nothing one account enters is used for another.

Short answers

Question	Answer
Does LobbyGov use generative AI?	Yes, in the six optional features listed below. All use OpenAI models.
Does the AI act on its own?	No. In the AI Report Builder the AI chooses which read-only lookups to run, such as a bill's votes. It cannot change data, send email, or create reports or schedules, and a person starts every run and reads the result.
Does the AI learn from what we enter?	No. No model is trained or fine-tuned on customer data.
Does it read information we enter?	Only in the AI Report Builder, and only when a person on your account uses it. It never reads Bill Analysis answers.
Are AI bill summaries built from our data?	No. Shared summaries are written from public legislative records only, such as bill text, the Legislature's bill reports and roll calls.
Can we turn AI off?	Yes. One account setting turns off every AI feature and all AI-written content for everyone on the account. See *Turn AI features on or off*.

The AI features

- **AI bill snapshot:** a short and a detailed plain-language summary on each bill's page, written from public records and shown to every account.
- **AI bill summaries:** additional summaries of a bill, used on bill pages and as an optional report column, written from public records.
- **Ask AI about a bill:** answers a question you type about one bill, using public records about that bill and your conversation so far.
- **Ask AI about the RCW, WAC or a rule:** answers a question you type about a section of law or a rulemaking, using public statute and rule text and the bills that change it.

- **AI Report Builder (Beta):** answers questions about your account's tracked bills, or drafts a memo or update you can save. This is the only feature that reads anything your account entered.
- **Similar bills:** suggests related bills on a bill's page, based on public bill titles and descriptions. It compares bills for similarity and does not generate text.

What is sent to the AI

Your account's data reaches the AI only when someone on your account runs the AI Report Builder, and only to answer that person. In that case the following is sent:

- The question or request the person types, and the conversation so far.
- Your account's tracking details for the bills in question: positions, priorities, client and list names, and list comments.
- Your account's notes on bills and legislators, and vote card positions and notes.

The AI sees only what the person running it can already see in LobbyGov. It cannot reach another person's private items or another account.

What is never sent to the AI

- Bill Analysis work: assignments, reviews, answers, approvals and comments.
- Custom fields, uploaded files, distribution lists, email addresses and passwords.
- Anything from another account.

Where the results go

- Shared bill summaries and similar-bill suggestions are made from public records only, so they carry nothing from any account.
- AI Report Builder answers and drafts are stored in your account and visible to the person who asked. A draft becomes a file only when that person saves it.
- Ask AI conversations about a bill are stored in your account and can be seen by others on the same account. RCW, WAC and rule conversations are not stored.

The AI provider

- All AI features use OpenAI's business API, called from LobbyGov's servers. You never connect to OpenAI directly, and no OpenAI account is created for you.
- OpenAI does not use data sent through its API to train or improve its models unless the customer opts in. LobbyGov has not opted in.
- OpenAI keeps abuse-monitoring logs for up to 30 days unless longer retention is required by law. LobbyGov asks OpenAI not to store conversation history beyond that.
- OpenAI offers Zero Data Retention to eligible business customers. LobbyGov can apply for it if your agency requires it.
- Every request is sent over an encrypted (HTTPS) connection.

Safeguards

- **Facts come from records, not the AI.** In the AI Report Builder, LobbyGov looks up the facts and the AI only chooses and words them. Vote counts are re-read from the official roll call before they are shown.

- **Every fact is sourced.** Answers and drafts number each claim and link it to the bill, vote or hearing it came from. Anything the AI could not find is marked for you to fill in or remove, and a draft cannot be saved until that is done.
- **Read-only.** The AI cannot change data, send email, create reports or schedules, or act without a person starting it.
- **Usage limits.** Each account has a monthly cap on AI Report Builder runs.
- **Labelled.** AI features are marked as AI in the product.

Questions

For anything this article does not answer, or to have AI turned off before your staff sign in, email info@lobbygov.com.

Turn AI features on or off

One account setting, **AI features**, turns AI on or off for everyone on your account. The change takes effect immediately.

Change the setting

1. Sign in as an account administrator.
2. Go to **Settings**, then **AI Features**.
3. Turn the **AI features** setting on or off.

LobbyGov can also set this for you before anyone on your account signs in. Email info@lobbygov.com.

What happens when AI is off

- Every AI feature disappears: Ask AI on bills, laws and rules, and the AI Report Builder.
- AI-written content is not shown: no bill snapshots, AI summaries, AI report columns or similar-bill suggestions.
- No request carrying your account's data or questions goes to the AI provider.
- Everything else works as before. Bill tracking, reports, schedules, vote cards and Bill Analysis do not depend on AI.

Good to know

- Each change is recorded with who made it and when.
- You can keep AI off until your agency's review is complete, then turn it on yourself.

For details on what the AI features read and where results are stored, see *How LobbyGov with AI uses AI and your data*.

Bills and Search

Finding bills, reading them, calendars, laws and rules.

Bill Explorer: search, filter and act on every bill

Every bill in a session, to search, filter and act on. The session is in the title; click it to switch to another session.

Where to find it

In the left menu, under **Bills**, click **Bill Explorer**. What you see depends on your role and your plan.

Finding bills

- **Search** takes words, a bill number like 1001, or a range like 1000-1100.
- **Searching by words** finds the bills that use them first, best match at the top. Bills about the same thing in other words follow under a **Related bills** row: a search for wolves finds the livestock predation bills too. When no bill uses your words, the row says so and every result is a related bill.
- **Sorting by a column** mixes the two groups, so each related bill carries a **Related topic** tag instead. **Best match** puts them back in their groups.
- **Related bills** come from AI. They need a search of at least three letters, and a bill number never brings them. If AI features are off for your account, search finds only the bills that use your words.
- **Filters** opens the panel on the left. Under **Yours** are your own shortcuts: bills you track, bills on your watch list, bills with notes or a position. Below that you can filter by status, type, sponsor, category, list, where a bill is, and more. Each filter shows how many bills it would leave.
- Filters combine, so ticking two narrows the list to bills that match both. **Clear filters** starts again.
- **Saved** keeps a set of filters to come back to.

Working with bills

- Click a bill's number to open it in a quick view without leaving the page. Open it in a new tab to get the full bill page.
- Tick bills to add them to a tracking list or your watch list in one go.
- **Columns** picks which columns show and in what order. Drag a column's edge to resize it.
- With **On my watch list** ticked, **Alerts** sets what your watch list emails you about.

Coming from LobbyGov Legacy

This was **Search Bills**, and the **Watch List** page. Your watch list is now **On my watch list** under Filters.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

The bill page: status, summary, versions and your notes

Everything about one bill: where it is, what it does, and what your account has said about it.

Where to find it

Click a bill number anywhere in LobbyGov. What you see depends on your role and your plan.

At the top

- The bill's status in plain words, its sponsors and companion, and a progress bar from introduction to law. Under the bar: where the bill is now, what comes next, and the next cutoff it faces.
- **Since you were here** sums up what happened since your last visit. **See timeline** shows each step.
- The icons on the right copy a link to this page and open the bill on the Legislature's site.

Your workspace

The panel on the right is your account's own work on the bill.

- **Watch** adds the bill to your watch list.
- **On your lists** shows each tracking list it's on, with its position, priority, description, comment and categories. **Add to list** puts it on another list.
- **Notes** are shared with your account. Add what happened or what you heard.

The workspace folds away on Versions, Amendments and Reports so the text has room. **My workspace** brings it back.

The tabs

- **Overview**: what changed in the latest version, the staff summary, the AI summary, recent actions and documents, the statutes it changes, sponsors, fiscal notes and related bills. **Related bills** lists the same bill introduced in earlier sessions and, if AI features are on, bills this session about the same thing. A bill's session shows when it isn't this one.
- **Timeline**: every action on the bill. **Key events** keeps only the milestones.
- **Hearings**: past and upcoming hearings, the committee's recommendation and who testified. Upcoming public hearings have a link to sign in to testify.
- **Votes**: each roll call, by party, with a search for one legislator.
- **Versions**: each version's text. Pick two to compare them and see what changed.
- **Amendments**: amendments by stage, with what each one changes.
- **Reports**: bill reports and other documents, to read on the page.

A tab is greyed out when the bill has nothing for it yet.

> The **AI summary** describes the bill as it reads now, from its staff analysis, adopted amendments, votes and current text. If the bill has moved since it was written, the card says so. **Ask AI**, at the end of the tabs, answers questions about this bill. Both appear only if AI features are on for your account.

Coming from LobbyGov Legacy

This was the bill's detail page. Positions, priorities, comments and notes that were there came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

The Calendar: committee meetings and your bills

The Legislature's committee meetings, with the bills you follow on each agenda.

Where to find it

Click **Calendar** in the left menu. What you see depends on your role and your plan.

Finding meetings

- **Month**, **Week**, **Day** and **List** change the view. Use the arrows and **Today** to move through the dates.
- **Show** picks whose meetings: **My bills** (meetings with a bill from your lists on the agenda), **Committees I follow**, **Attending**, or **Everything**. If you have a calendar feed, **My calendar feed** shows what's in it.
- The type boxes choose hearings, executive sessions, work sessions, other meetings and cutoffs. **Chamber** narrows it to the House or Senate.
- **Search** finds a committee or a bill.
- The **Bills** menu, at the top, shows the agendas through one client's bills instead of all your lists.

A meeting

Click a meeting to see its agenda on the right. Each item shows the bill, its prime sponsor, and your position on it if it's on your lists. Upcoming public hearings have a link to sign in to testify.

- **Attend** marks a meeting you're going to.
- **Follow** a committee to get alerts about its meetings.
- The calendar button downloads the meeting for your own calendar, and **Watch on TVW** opens the video.

List is a week's agendas, one after another. **Download as .ics** saves the meetings you've marked Attending.

Sync to my calendar

Sync to my calendar gives you a private link that Google, Outlook or Apple Calendar keeps up to date on its own. Choose what goes in it: meetings you're attending, committees you choose, hearings on your tracked bills, your watch list, or everything. Calendar apps check the link on their own schedule (Google can take a day). Anyone with the link can see it, so **Make a new link** if it gets shared by mistake.

> Times are shown in your own time zone, set in your profile.

Coming from LobbyGov Legacy

This was **Calendars**. Its Weekly Planner is the **List** view, and Sync Settings is **Sync to my calendar**. Your sync settings came over, so an existing calendar subscription keeps working.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

RCW and WAC readers: state laws and agency rules

The state's laws (RCW) and agency rules (WAC), from the Code Reviser's official files, with what LobbyGov knows about them alongside.

Where to find it

In the left menu, under **Bills**, click **RCW & WAC**. What you see depends on your role and your plan.

Finding your way

- Switch between **RCW** and **WAC** at the top of the left panel.
- Type a citation such as 51.08.142 to go straight to it, or words to search the text. Sections about the same thing in other words follow under **Related sections**: a search for rent control finds the sections on rent increase notices too. Related sections come from AI; with AI features off, only sections that use your words are found.
- **Browse the code** opens the tree at the title, chapter or section you're reading. Your **Watched** citations and **Recently viewed** are listed there too.

Reading

- Beside each title and chapter, the count shows bills this session that change it (RCW) or agency filings in the past year that name it (WAC).
- On a chapter or section, the bills this session that change it are listed above the text.
- **Watch** adds the citation to your Statutes for a client, so you hear when a bill changes it.
- **Copy citation**, **PDF** and **leg.wa.gov** are next to the heading. **Display** changes the font and layout; its **Pages** layout hides the tree to give the text more room.
- Where a section has more than one version, the tabs say which one is in force when.

Coming from LobbyGov Legacy

These readers are new. LobbyGov Legacy linked to leg.wa.gov.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Rulemaking: follow agency rules from notice to adoption

State agency rulemaking from the Washington State Register. Each row is one rule as it moves from first notice to adoption: a preproposal (CR-101), a proposal (CR-102) and an adoption (CR-103) are joined into one row showing how far the rule has got.

Where to find it

In the left menu, under **Bills**, click **Rulemaking**. What you see depends on your role and your plan.

Finding rules

- **Search** the filings by words, a WSR number or a WAC cite. Rules about the same thing in other words follow under **Related rules**: a search for eviction finds rules on rent limits too. When no filing uses your words, the heading says so. Related rules come from AI; with AI features off, only filings that use your words are found.
- **Filters** narrow the list: rules that match what your clients follow, rules open for comment or closing within a week, scheduled hearings, the stage, the agency, the Register issue, or the year.
- The line under the title counts what's open for comment, closing soon and scheduled for hearing. Click a count to see those rules.

A rule

Click a row to see its summary and its filings in order, with:

- When comments close, and **Email** or **Comment online** to submit one.
- The hearing, if one is scheduled.
- The WAC sections it changes and the RCWs behind it, and bills that touch the same law.
- Links to the official filing and the Register issue.

The tabs

- **Rules**: every rulemaking.
- **Agencies**: each agency's activity, to follow an agency.
- **Guidance**: agencies' interpretive and policy statements.
- **Following**: the agencies, phrases and WAC codes your clients follow, and how many filings each has matched.

New filings are checked every morning, and matches to what you follow come in the morning email if rulemaking alerts are on in your notification settings.

Coming from LobbyGov Legacy

This was **Rulemaking**.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Session Insights: how a session went

How a session went: how far bills got, where they died, and which committees they died in.

Where to find it

In the left menu, under **Bills**, click **Session Insights**. What you see depends on your role and your plan.

Reading it

- Choose a **session** at the top.
- With **All bills**, every number is for the whole legislature.
- Choose a client under **Show** to see only the bills on its lists, with the legislature's figures beside them for comparison.
- **How far bills got** counts how many were introduced, heard in committee, got out of committee, passed one chamber, passed both and were enacted.
- **Where bills died** shows the stage each bill stopped at.
- **Committee kill rate** shows the share of referred bills that died in each committee. Committees that saw only a few bills show no rate.
- With a client chosen, **Positions** shows what happened to the bills it took a position on, and its **win rate**.

> The client report download is an early version, marked **Lab**. Check it before you send it to anyone.

Coming from LobbyGov Legacy

This page is new.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Coalitions: who votes with whom

Who votes with whom, from a session's recorded votes. Choose the session at the top, then a tab.

Where to find it

In the left menu, under **Bills**, click **Coalitions**. What you see depends on your role and your plan.

The tabs

- **Alignment**: how often each member voted your client's way on the bills it took a position on. Choose a client first.
- **Persuadables**: pick a bill your client has a position on to see who is on your side, who is against, who usually follows their caucus and who is in play, how many votes you still need, and a whip list. Choose a client first.
- **Breaks with caucus**: who votes against their own caucus, how often, and on what. Click a member to read their breaks.
- **Votes with**: who a member votes with most, in their own caucus and across the aisle. Click a name to list the votes where the two split.

How it's counted

Only Yea and Nay votes count. Choose floor votes, committee votes or all roll calls. Every rate is shown beside its caucus's median, because a rate means little until you know what's normal. **Export** downloads what's on screen.

Coming from LobbyGov Legacy

This page is new.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Who Testifies: who signs in at committee hearings

See who turns up at committee hearings, session by session, read from the Legislature's sign-in records. Sessions before 2025 come from the bill reports instead.

Where to find it

In the left menu, under **Bills**, click **Who Testifies**. What you see depends on your role and your plan.

The list

- **People**, **Organizations** and **Bills** are the three views. Choose a name to open its page.
- **Came to speak** leaves out people who only registered a position; **Every sign-in** includes them.
- **Bills** narrows everything to one client's tracked bills. **Allies**, **Opponents** and the **Vs** column then compare each witness's Pro or Con with the client's Support or Oppose.
- **Any side**, **Mostly Pro**, **Mostly Con** and **Mixed** filter by how someone leans.
- **Filters** holds **Type**, **When** and **Committee**.
- **Export** downloads the People or Organizations list as a CSV.
- **How it's counted** explains the numbers.

A person or organization

- **Hearings** lists each one, with the side taken and whether they spoke.
- **Came alongside** and **Came against** show who was on the same or the other side at two or more of the same hearings.

Open a page from a client's list and it also shows how they line up with that client.

Coming from LobbyGov Legacy

LobbyGov Legacy had no page like this. It's new.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Tracking Lists and Clients

Clients, tracking lists, and the fields on them.

Manage Clients: clients, their lists and who can see them

Your clients, their tracking lists, and who can see each one.

Where to find it

In the left menu, under **Clients & Lists**, click **Manage Clients**. What you see depends on your role and your plan.

By client

- **Search** finds a client. **Needs attention** shows clients with a problem: nobody but account admins can see it, it has no tracking lists or no bills, or no bill has been added in a year.
- Click a client to see its details. Its tabs are:
- **Lists**: add a tracking list with **+**. The star makes a list the client's primary list.
- **Categories**: add categories, or copy another client's.
- **People**: who can see it, and their role.
- The row's menu edits, archives or deletes a client. **Archive** hides it, and its lists stop counting toward your plan. **Delete** removes its lists too, and can't be undone.
- Tick several clients to add a person to all of them, copy categories, or archive them.

Roles

- **Manager**: everything, including lists, settings and who has access.
- **Editor**: adds and edits bills on all its lists.
- **Viewer**: read only.

Edit permissions on a person can give them a different role on particular lists.

By User

A grid of every client and every person, to change access for many people at once. Click a square to set that person's role on that client. Click a person's name to give them one role on every client shown, or copy someone else's access. The help button (?) above the grid explains the squares.

> Only account admins (super users) can create clients. Other people with this page see the clients they're on.

Coming from LobbyGov Legacy

This was **Manage Clients**. Your clients, lists, categories and access came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Tracking lists: positions, priorities, notes and more

A tracking list is a client's bills with your account's take on each one: position, priority, categories, comments and notes. The session is in the title; click it to switch to another session, half of one, or all sessions.

Where to find it

In the left menu, click a list under its client. What you see depends on your role and your plan.

Finding bills

- **Filters** opens the panel on the left: position, priority, category, progress, where a bill sits, and sponsor, each with how many bills it would leave.
- **Search** finds a bill number, a word from the title, or something in your notes.
- The **dead and inactive** menu shows or hides dead and inactive bills. **Group** sorts the list into sections by position, priority or category.
- **View** picks which columns show and in what order, and how many rows per page. **Use on all my lists** keeps that layout for every list.
- Click a column's heading to sort by it.

Working with bills

- Click a bill's number to open its edit panel: position, priority, categories, dead and active, short description, comments, your own fields, and a notes log for calls and meetings. Changes save as you go.
- Position and priority can also be changed right in the table.
- The three-dot menu on a row has the bill's page, the Legislature's page, marking it dead or inactive, and removing it from the list.
- **Tick bills** to change many at once: set a position, priority or category, copy them to another list, mark them dead or inactive, or remove them. **All** selects every bill that matches your filters, not just this page.
- **Add Bill** adds one or several bill numbers at once, with a position, priority and categories to start with.
- The **Categories** tab is your own headings for sorting and reporting on this list's bills.

Sharing it

- **Export** downloads the list as CSV, Excel or Word, with the columns on screen or every column, or prints it. Your filters and sort carry over.
- **Publish** makes a public link you can send to a client, or embed on a website. **Published View Settings** chooses what it shows, and **Stop Publishing** turns the link off.

> What you can change depends on your access to the client. Without edit access, you can still read the list, export it and add bills to your watch list.

Coming from LobbyGov Legacy

Your clients and their lists were in the left menu, as they are now under **Clients & Lists**. Your lists, positions, priorities, categories, comments and notes came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Global Tracking View: every tracked bill in one place

Every bill on every tracking list you can see, one row per bill, even when a bill is on several lists. Use it to see everything at once, or to change a bill on all your lists in one go.

Where to find it

In the left menu, under **Clients & Lists**, click **Global Tracking View**. What you see depends on your role and your plan.

Finding bills

- **Search** by bill number or description.
- **Filters** narrow it by your tracking (on your watch list, dead on every list or only some, inactive on a list), position, client, list, progress, where the bill sits, or sponsor.
- Use the session menu at the top to look at an earlier session.

Each row

- **Position** shows **Mixed** when your lists disagree. Hover for which list says what.
- **Lists** shows which lists the bill is on.
- **Dead** and **Inactive** say whether that's true on every list or only some, for example "Dead on 2/3".

Changing bills

- **Edit on your lists** changes the bill's position, priority, description and comments. Tick **All lists** beside a field to change it everywhere at once.
- **Edit by bill #**, at the top, goes straight to that form for any bill on your lists.
- The row's menu marks a bill dead, alive, inactive or active on all your lists, removes it from lists, or adds it to bill analysis.
- Tick several bills for **Actions**: mark them dead or alive across all lists, use the official title as the description or the bill digest as the comments, or add them to your watch list.

> Position, priority and categories can't be changed in bulk here because each list has its own. Change those on a tracking list. You can only change bills on lists you can edit.

Coming from LobbyGov Legacy

This was the **Global Tracking View**.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Tracking Lists settings: how lists open and what is pre-filled

How your lists open, and what's filled in when you add bills. Everything saves as you change it.

Where to find it

In the left menu, under **Settings**, click **Tracking Lists**. What you see depends on your role and your plan.

Opening lists

These are yours alone, in every account you belong to.

- **Open a list when you sign in** starts you on the list you pick instead of the dashboard.
- **Bills per page** and **Sort by** set how a list first appears. On a list you can still re-sort or change the page size.

Adding and editing bills

These are yours, for the account you're in. They fill in the add-bills dialog, and you can change any of it before adding.

- **Position** and **Priority** picked for each bill you add.
- **Companion bills** adds a bill's companions along with it.
- **Short description** and **Comments** start with the bill's title and official description. Off leaves them blank.
- **Also change it on my other lists** starts with that option ticked when you edit a bill's comments or short description.
- **By client** sets a different position or priority for bills you add to one client's lists.

Everyone on the account

Super users can copy their adding defaults to everyone else on the account. It replaces theirs and can't be undone; how lists open stays each person's own.

Coming from LobbyGov Legacy

This was **Preferences → Adding and Editing Bills** and **List Viewing**. Your choices on both came over.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Categories: tag bills so you can sort and filter

Categories are tags you put on bills, such as "Health care" or "Budget", so you can sort and filter by them.

Where to find it

In the left menu, under **Settings**, click **Categories**. What you see depends on your role and your plan.

Where a category can be used

When you add one, choose where it's available. You can't move it later.

- **Account**: every list, in every client.
- **Client**: every list in the client you pick.
- **List**: only the list you pick.

Names only need to be unique within their scope.

Managing them

- **Add category** opens a dialog for the name and where it applies.
- The pencil renames a category; the bin deletes it. Deleting takes it off every bill it's on.
- Each row shows where the category applies and how many bills have it.
- The All / Account / Client / List tabs and the search narrow a long list.

Using them

You tag bills from a tracking list. Lists, Bill Explorer and reports can then filter by category.

> Categories are part of some plans only. If the page says they aren't enabled, contact support.
> Categories belong to the account you're in; switch accounts to edit another one's.

Coming from LobbyGov Legacy

This was **Preferences** → **Categories**. Your categories, and the bills tagged with them, came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Custom Fields on tracking lists

Your own fields to fill in on bills, for anything LobbyGov doesn't track for you: a staff contact, a next step, a follow-up date.

Where to find it

In the left menu, under **Settings**, click **Custom Fields**. What you see depends on your role and your plan.

Kinds of field

Text field, large text box, date, dropdown, checkboxes, and hyperlink. For a dropdown or checkboxes, add the choices from **Options** in the field's menu once it's created. Renaming a choice changes it on every bill that has it.

Where a field can be used

- **Account**: every list, in every client.
- **Client**: every list in the client you pick.
- **List**: only the list you pick.

Managing them

- **Add field** sets its name, kind and where it applies.
- Drag the handle to change the order fields appear in on a bill.
- The switch decides whether lists can show the field as a column. Each person still picks their own columns from a list's column picker. A field switched off can still be filled in on a bill.
- The menu edits, manages options, or deletes a field. Deleting removes everything entered in it.

> Custom fields are part of some plans only. If the page says they aren't enabled, contact support.

Coming from LobbyGov Legacy

This was **Preferences → Custom Fields**. Your fields, their choices and what was entered in them came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Positions and Priorities: set your own choices

The positions (support, oppose…) and priorities people pick from on your tracking lists. Until you add your own, lists use the built-in ones.

Where to find it

In the left menu, under **Settings**, click **Positions & Priorities**. What you see depends on your role and your plan.

Which set a list uses

1. The list's own, if it has any.
2. Otherwise its client's.
3. Otherwise the account's.
4. Otherwise the built-in set.

A level's own set replaces the one above it rather than adding to it. When you add the first one at a level, you're asked before the old values are cleared on that level's bills in the current session.

Managing them

- **Add position** and **Add priority** set a name and where it applies: the whole account, one client, or one list.
- Click a name to rename it. Drag to change the order they're offered in (clear any filters first).
- The menu changes where one applies or deletes it.
- Mark one position at each level as **support** and one as **oppose**. Legislator pages use them to compare votes with your positions, and the calendar and committee pages colour them green and red.
- Mark one priority at each level as **highest** and one as **lowest**.

> Custom positions and priorities are part of some plans only. If they aren't turned on, contact support.

Coming from LobbyGov Legacy

Your custom positions and priorities came over with your account, along with the bills they're set on.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Keywords and Statutes

Let LobbyGov find bills for you.

Keywords: find bills that mention a word or phrase

Add a word or phrase for a client, and we'll check this session's bills for it every hour. Any bill that mentions it shows up under Matches. If you have keyword alerts turned on, new matches are in your morning email too.

Where to find it

In the left menu, under **Keywords & Statutes**, click **Keywords**. What you see depends on your role and your plan.

Matches

- **New** is what nobody has looked at yet. **Reviewed** is what someone has, and **All** is everything, including what a keyword found on the day it was added.
- Each row is a bill, with the sentence your keyword turned up in.
- **Related topic** marks a bill about your keyword's subject that never uses its words, such as a bill that limits rent increases for "rent control". AI reads the bills closest in meaning to the keyword and flags only those about it. These arrive with your other matches and in the same alerts.
- The add-to-list button puts the bill on a tracking list. A number on it means the bill is already on that client's list.
- The check mark moves the bill to Reviewed once you've looked at it. You can undo it, or bring it back from Reviewed later.
- **Mark all reviewed** moves every bill in New to Reviewed, on every page, under the filters you've set. You can undo it right after.
- **Hide resolutions** leaves out resolutions and memorials.
- The link at the top clears out matches on bills that died in a session that's over.

Keywords

- **Exact phrase** looks for your words together, in that order. Capitals don't matter and plurals count, so "common carrier" also finds "common carriers".
- **Starts with** looks for any word that begins with yours, so "electric" finds electrical and electricity too. The form lists the words it would pick up, so you can check before saving.
- **Looks in** is which parts of a bill we check. Reports means committee reports, fiscal notes and analyses.
- **Also find bills on the same subject** turns Related topic matches on or off for that keyword. It's on unless you turn it off. If your account has AI features turned off, keywords match by their words only.
- As you type, the form shows how many bills the keyword would have found this session. If the number is big, try a longer phrase.

- A keyword used for more than one client is a single row. Changes apply to every one of those clients you can edit. To drop it for one client, untick that client in the form.
- The switch pauses a keyword. It stops checking and stops alerting, but keeps what it already found.
- Click a keyword's match count to see its matches.

Coming from LobbyGov Legacy

This was **Statutes & Keywords** (or **Keyword Tracking**) in the menu. Your keywords and what they had found came over with your account.

> You see keywords for the clients you have access to. To add or change them, you need edit access to that client.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Statutes: find bills that change a law you care about

Pick a title, chapter or section of the RCW for a client. Each weekday morning we ask the Legislature which bills change it, and any new ones show up under Matches. If you have statute alerts turned on, they're in your morning email too.

Where to find it

In the left menu, under **Keywords & Statutes**, click **Statutes**. What you see depends on your role and your plan.

Matches

- **New** is what nobody has looked at yet. **Reviewed** is what someone has, and **All** is everything, including what a statute already had on the day it was added.
- Each row is a bill. Under it you'll see which sections it changes and how: amends, repeals, adds a section, and so on.
- Tick bills to add several to a list at once, or mark them reviewed.
- The add-to-list button puts the bill on a tracking list. A number on it means the bill is already on that client's list.
- The check mark moves the bill to Reviewed. You can undo it, or bring it back from Reviewed later.
- **Mark all reviewed** moves every bill in New to Reviewed, on every page, under the filters you've set. You can undo it right after.
- The session picker shows earlier sessions that had matches. The download and print buttons give you the bills in view.

Statutes

- A **title** catches any bill that touches it, which can be a lot. A **chapter** catches changes to any of its sections, and a **section** only that one.

- A statute kept for more than one client is a single row. Changes apply to every one of those clients you can edit. To drop it for one client, untick that client in the form.
- The switch pauses a statute. It stops checking and stops alerting, but keeps what it already found.
- Click a statute's citation to read it, or its match count to see its bills.
- WAC watches don't match bills, since bills only change the RCW. They're for agency rulemaking, which is on the Rulemaking page.

Coming from LobbyGov Legacy

This was **Statutes & Keywords** in the menu. Your statutes and what they had found came over with your account.

> You see statutes for the clients you have access to. To add or change them, you need edit access to that client.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Legislators, Committees and Votes

Members, committees, vote cards and scorecards.

Legislators: contact details, committees and sponsored bills

Every member of the Legislature this session, with their contact details and committees.

Where to find it

In the left menu, under **People & Committees**, click **Legislators**. What you see depends on your role and your plan.

Finding someone

- **Search** by name, email, phone or district.
- The chamber switch narrows it to one chamber. **Filters** narrows it by party or committee.
- The letters above the table jump to a last name.
- **Sort by** orders the table by name or district.

Compare to

Choose a client (or all your lists) in **Compare to**, and the table adds how many of its bills each member sponsored and how often they voted its way. You can then sort by those, or filter to members who sponsored one of its bills. A dash means fewer than three floor votes to go on.

Saving and sharing

- **Export CSV** downloads the table as it's filtered.
- **Print** opens a printable list.
- The contact card button on a row saves that member as a contact card (vCard).

A legislator's page

Click a member for their page:

- Their committees, contact details, legislative assistant, office and district.
- **Sponsored**: the bills they sponsored, this session or earlier.
- **Votes**: how they voted on each roll call.
- With **Compare to** set, a tab of that client's bills and how they voted on each.
- **Notes**: notes about the legislator, kept for you or the whole account, and follow-ups to mark done.

Coming from LobbyGov Legacy

This was **Legislators**. Notes about legislators are new.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Committees: members, meetings and bills

This session's committees, when they meet next, and the bills in front of them.

Where to find it

In the left menu, under **People & Committees**, click **Committees**. What you see depends on your role and your plan.

The list

- Committees are grouped by chamber. Each shows its members, the bills in committee, and its next meeting (or when it last met).
- **Search** finds a committee by name or acronym. The switches narrow it to one chamber, to committees you follow, or to committees with your bills.
- The star follows a committee, for alerts about its meetings.
- The **Bills** menu counts one client's bills instead of all your lists.
- **Hearing schedule** opens the calendar's list of meetings.

A committee's page

- **Meetings**: upcoming and past meetings with their agendas. Upcoming public hearings have a link to sign in to testify. The calendar button downloads a meeting for your own calendar.
- **Bills in committee**: what's in committee now and what was referred this session, with each bill's next step: a hearing or executive session on the calendar, the committee's recommendation, or "heard, no exec".
- **Members**: each member's party, district and office. With a client chosen in **Bills**, how often each member votes its way.
- **Follow** gets alerts about the committee's meetings. **Sync meetings** adds them to your calendar subscription.

> Chair and vice chair are shown only where the Legislature's data records them, which for most committees it doesn't.

Coming from LobbyGov Legacy

This was **Committees**.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Vote Cards: keep a whip count

A vote card is a whip count: where each member stands before a vote. It's private until you share it.

Where to find it

In the left menu, under **People & Committees**, click **Vote Cards**. What you see depends on your role and your plan.

Your cards

- Each card shows a tally for each chamber and whether you have the votes, or how many short you are.
- **New vote card** starts one **from a bill**, or as an **issue** with no bill yet. You can start positions from the bill's sponsors (Firm yes), its committee vote, or each caucus's usual position.
- A card's menu renames, shares, duplicates it for the other chamber, archives or deletes it.

On a card

- Set each member's position: **Firm yes**, **Lean yes**, **Undecided**, **Lean no**, **Firm no**, or **Unassessed**. Click the dots, or click a row and press 1 to 6.
- **Target** is the number of votes you need: a simple majority, three fifths, two thirds, or your own number. Firm and lean yes count toward it.
- Click a member to see their **Evidence** (sponsorship, committee and floor votes, votes on similar bills, breaks with their caucus) and to add **Notes** on what you heard.
- Filter, group by caucus or committee, or sort, to work through who's left. **Changed this week** shows what moved.
- Tick several members to set their position or add a note at once.
- **Share** gives people **Can edit** or **Can view**. Nobody gets an email.
- The ⋯ menu exports a spreadsheet or prints the card. **Add to a report** puts the count in a saved report. **History** shows every change.

Coming from LobbyGov Legacy

This was **Vote Cards**. Your cards came over with your account. Old cards had no bill attached; **Attach a bill** on a card brings in its sponsors and votes.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Scorecards: how legislators voted on your positions

A scorecard shows how each legislator voted, with or against your positions on a list.

Where to find it

In the left menu, under **Tools**, click **Scorecards**. What you see depends on your role and your plan.

Automatic scorecards

Choose a client, a list, a session, the years and the chamber. Every bill on the list with a **Support** or **Oppose** position scores its latest final passage vote in each chamber. **What will score** shows the count before you start. **Leave excused and absent out** stops missed votes counting against anyone. Then **Show scorecard**.

Custom scorecards

Pick the roll calls yourself. **New custom scorecard** names one and picks its list. Then open each bill, tick the votes it counts, and set the side you want and, with **Use weights**, how much each vote counts.

On a scorecard

- Members are ranked by how often they voted with you. Click one to see the votes behind their score.
- **Export** downloads Excel, prints or saves a PDF, or emails the scorecard.
- **Add to a report** puts an automatic scorecard in a saved report.
- Bills without a position don't score. The warning at the top takes you to the list to set them.

Coming from LobbyGov Legacy

This was **Tools & Wizards → Scorecards**, with its Generate and Custom Scorecards pages. Your custom scorecards came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Reports

Saved reports, schedules and the AI Report Builder.

Reports: saved reports, schedules and files

Your saved reports, their schedules, and every file they've made. A saved report remembers what it covers (a client, lists, which bills) and how it looks, so you can run it again, send it on a schedule, or share a live link.

Where to find it

In the left menu, under **Reports**, click **All Reports**. What you see depends on your role and your plan.

Making a report

- **New report** starts from a ready-made layout: **Bill status with upcoming events** is the most used, then bill status, detail, weekly, upcoming events, or a blank report.
- In the editor, pick the client and lists, which bills to include (positions, priorities, categories, dead or enacted), and the sections. Sections can be switched on or off, reordered, added or removed.
- **Header & footer** sets the letterhead, page orientation, opening and closing text, and page footer.
- **Run as Word** makes the file; its menu also offers Excel, PDF and CSV, or running it and emailing it.

The Reports tab

- Each saved report shows what it covers, how it's sent, and its last run. The download button downloads the last file.
- The row's **…** menu runs it in another format, sends it now, edits it, schedules it, makes a **live link** (a page that's always up to date), or duplicates it for another client.
- Tick reports to run or delete several at once.

Schedules and Files

- **Schedules** lists when each report goes out next and to whom. The switch turns a schedule on or off.
- **Files** is every file made, by you or on a schedule, to download again. **Live links** are there too, with how often each has been viewed.
- **Upcoming sends**, at the top, shows what's going out in the next few days.

Settings

The cog opens **Report settings**: letterheads, distribution lists (the people a report is emailed to), and the defaults every report uses unless it sets its own.

Coming from LobbyGov Legacy

This was **Reports**. Your saved reports, schedules, distribution lists and letterheads came over with your account. Scheduled reports came over paused, so nothing was sent before you were ready; switch each one on under **Schedules**.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

The report editor: choose what a report covers and prints

Set what a report covers and what it prints. The right side shows the report as it stands, from real bills.

Where to find it

Open a saved report, or start a new one, from **Reports** in the left menu. What you see depends on your role and your plan.

Scope

With more than one client, **Files** chooses one file for them all or one each; schedules still send one file.

Sections

- Drag to reorder. A section's switch leaves it out without removing it.
- **Add a section** offers **Text**, **Upcoming hearings**, **Bills**, **Vote card** and **Scorecard**.
- **Replace all with a preset...**, in the ⋯ menu, swaps the sections only. Who it covers, the letterhead and the title stay.
- A **Bills** section is a **Table** or **Detail**. **Add a field** adds a column; type over a heading to rename it.

Run and Save

- **Run as Word** works before saving: it uses what's on screen and saves nothing. Its menu has **Run and email...**.
- **Schedule** and **Live link** need the report saved first.

Weekly reports

A weekly follows the account's default weekly. Parts you change are marked **override**, and **Back to the default** clears them.

> Only account superusers can use **Edit the default**.

Coming from LobbyGov Legacy

This was **Reports** → **Generate** and **Reports** → **Weekly Report Settings**. Saved settings came over as saved reports, except for report types not rebuilt here. Weekly settings and the account's default weekly came over too.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

AI Report Builder (Beta): ask questions and draft documents from your bills

Ask about the bills on your lists, or have a document written from them. It's in Beta and part of it is AI-written, so read it before you send it.

Where to find it

In the left menu, under **Reports**, click **AI Report Builder**. What you see depends on your role and your plan.

Ask and Write

- Type a question, or pick a task and click the highlighted words to change them.
- **Ask** answers on the page, with sources.
- **Write it** makes a document. You see its parts first, then choose **Write it** again. Ask for changes in your own words.
- **Save to Files** makes a Word or PDF file. Anything flagged to check must be typed in or removed first.
- **Drafts** clear after 30 days. Saved work is under **Documents**.

What it can and can't do

- Tables and vote counts come from the records. The AI writes only the short summaries.
- Votes, bill actions and hearings link to their records.
- It can't read fiscal note amounts (it links to the notes), tell you who testified, or predict a vote.
- It can't look past the bills on your lists, or send or schedule anything.

Runs

Your team shares a monthly number of runs, counted at the top. The guided questions don't use one.

Coming from LobbyGov Legacy

This page is new. **Reports → Report Builder** in LobbyGov Legacy was a different tool.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Report Settings: what every report in the account shares

What every report in the account shares, a tab each. You see only the tabs you're allowed to change.

Where to find it

In the left menu, under **Reports**, click **Report Settings**. What you see depends on your role and your plan.

Letterheads

Images printed at the top of a report. **Add a letterhead** uploads one, for the whole account or one client. Turn **Available in reports** off to stop offering one without deleting it; reports already made keep it. Editing a letterhead changes it on every report that uses it, from the next run.

Distribution lists

The people a scheduled report is sent to. **New list** names one and sets who it comes from; then add recipients one at a time or paste a list. Pick a list when you schedule a report. **Archive** a list you no longer use; a list a schedule sends to can't be deleted.

Defaults

What every report uses unless it sets its own under **Header & footer**: the letterhead and where it sits, a subtitle, opening and closing text, and a page footer.

Coming from LobbyGov Legacy

These were **Reports → Header Images** and **Distribution Lists**. Your letterheads and distribution lists came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Tools and Wizards

Cutoff Wizard, It's Alive! and exports.

Cutoff Wizard: update bills that missed a cutoff

After each cutoff, the Legislature publishes a sheet of the bills that made it. The Cutoff Wizard finds the bills on your tracking lists that didn't, and updates them in one pass: marking them dead, or inactive, or giving them a priority.

Where to find it

In the left menu, under **Tools**, click **Cutoff Wizard**. What you see depends on your role and your plan.

Which bills it picks

- Bills on your lists that are **not on the sheet**, were introduced before it came out, and have **no new version since**.
- Bills that have passed the Legislature are left out: a bill that became law isn't dead, even though it's no longer on any sheet.
- Bills already in the state you're choosing are skipped. "Mark dead" only picks bills that aren't dead yet.

Using it

1. **Pick a cutoff sheet** at the top right. The newest is chosen for you. New sheets arrive each morning as the Legislature publishes them.
2. **What to do with them**: **Mark dead** flags the bills dead and records which sheet did it. **Clear the dead flag** undoes that. **Mark inactive** and **Mark active** set the bills' active status. **Or set a priority** gives them a priority instead, when all the lists you picked use the same priorities.
3. **Tracking lists**: tick the lists to update. Each shows how many of its bills would change, and lists with bills to change start ticked.
4. **Check the preview**: every bill that will change, by list, with its status and what changes. Untick any you want to leave alone.
5. Press the button (for example **Mark 14 bills dead**). The banner afterwards has **Undo** if that was too many, and each list's activity log records the change.

> A missed cutoff usually means a bill is dead for the session, but not always: a bill can still move as part of the budget. **It's Alive!** finds bills that started moving again.
>
> You only see lists you can edit.

Coming from LobbyGov Legacy

This was **Tools & Wizards → Cutoff Wizard**.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

It's Alive!: find dead or inactive bills that are moving again

Bills you marked inactive or dead sometimes start moving again: a budget vehicle, a bill pulled back to life on the floor. It's Alive! finds those bills on your tracking lists and fixes them in one pass.

Where to find it

In the left menu, under **Tools**, click **It's Alive! Tool**. What you see depends on your role and your plan.

Which bills it finds

- Bills on your lists that are marked **inactive** (or **dead**), in the current session, that have moved since **Moving since**: on a committee agenda, or with a vote.
- **Moving since** is this year's latest cutoff sheet. Before the first sheet comes out, it's the start of the year, and any action on the bill counts.
- Bills in **Rules X** are left out: they aren't moving, they're parked.

Using it

1. **What to do with them**: **Mark active** puts inactive bills back to active and leaves dead flags alone. **Clear the dead flag** unchecks Dead and leaves active status alone.
2. **Tracking lists**: tick the lists to check. Each shows how many of its bills qualify, and lists with bills to change start ticked.
3. **Check the preview**: every bill that will change, by list, with what moved it and what changes. Untick any you want to leave as they are.
4. Press the button (for example **Mark 6 bills active**). The banner afterwards has **Undo** if that was too many, and each list's activity log records the change.

> You only see lists you can edit.

Coming from LobbyGov Legacy

This was **Tools & Wizards → It's Alive! Tool**.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Export Data: download your tracked bills as a spreadsheet

Download a spreadsheet of the bills on your tracking lists.

Where to find it

In the left menu, under **Tools**, click **Export Data**. What you see depends on your role and your plan.

Making an export

1. Under **What to export**, choose a session, or one year of it, which keeps the bills that saw some action that year.
2. Choose a client and some or all of its lists. Only lists you can see are offered.
3. Tick the **Columns** you want. Drag them into order, and type over a name to change its header in the file.

4. Turn **Include a header row** off if you'll paste the rows under headers of your own.
5. **Preview** shows the first rows. Download as **Excel** or **CSV**, or **Print**.

Presets

A preset keeps a set of columns, their headers and their order. Use the **Preset** menu at the top to load one, save what's on screen as a new preset, rename one or delete it. **Show it for** limits where a preset is offered. Your presets are yours alone.

Coming from LobbyGov Legacy

This was **Tools & Wizards → Export Data**. Your export templates came over as presets.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

DonorPAC

Campaign contribution planning and tracking.

DonorPAC: plan and record campaign contributions

Plan and record campaign contributions to Washington candidates and committees. Each **contribution list** covers one state and one election cycle: for each candidate or committee you record what you recommend giving and what was actually given, for the primary and the general.

Where to find it

Open the **DonorPAC** group in the left menu. What you see depends on your role and your plan.

Contribution lists

- **New list** starts a list for a state and cycle. **Archived** lists are read only.
- On a list, the tabs split the Legislature, statewide offices, committees, and candidates or committees you've added yourself (**Add custom**).
- **Public record** compares your list with the contributions reported to the Public Disclosure Commission. Nothing is copied in unless you choose it.
- **Export** makes a **QuickSheet** (Word or Excel) or a **Detail report** (Word), showing recommended, given, or the difference.
- **Reports**, on the lists page, has a global report across lists and a candidate roster.
- Notes on a candidate or committee are kept on that list only.

Campaigns

Every candidate and committee in the state, with what all your lists have recommended and given. Open one for its giving across your lists, notes and payee details.

Analytics

Where the money went: given against recommended, by cycle, primary or general, list and type of recipient.

> Candidate and committee information comes from the Public Disclosure Commission and is updated every morning. Who can see or change each list is set on the **Users** page. The person who made a list, and account admins, can always change it, and only they can archive or delete it.

Coming from LobbyGov Legacy

DonorPAC was its own site, donorpac.lobbygov.com. Your lists, recommendations ("recs"), contributions ("actuals") and notes came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Bill Analysis

Day-to-day bill analysis work for reviewers, liaisons and approvers.

Bill Analysis overview: where the work stands

Where your agency's bill analysis stands this session, and what needs someone to act on it. Every number and row opens the work it counts, so you can act on it from here.

Where to find it

Open **Bill Analysis** in the left menu. What you see depends on your role and your plan.

The four stages

- **Awaiting assignment**: department work with no reviewer yet. It warns about hearings this week with nobody assigned.
- **Analysis pending**: assigned and being reviewed. It shows how many are overdue or due this week, and reviewers who have left or are inactive but still hold reviews.
- **Needs approval**: finished reviews waiting for sign-off, and how many have departments recommending different positions.
- **Completed**: finished work, with how many finished this week and the most common recommended positions.

Needs your attention

The list of things to act on now, grouped as **Overdue**, **Departments disagree**, **Ready to approve**, **Hearing this week, not ready** and **Misassigned**. The pills at the top narrow it to one group. Each row has its next step:

- **Assign…** or **Change reviewers…** picks who reviews the bill.
- **Why pending?** lists the reviewers who haven't finished.
- **Approve…** signs off on the analysis.
- **Review both** opens the task so you can weigh the differing positions.
- **Reassign…** sends misassigned work on to the right department.
- **Dismiss…** moves the work to Completed as dismissed. It can be reverted there.

On the side

- **Needs a decision**: reviewers who left their department or are inactive but are still on open reviews. Remove them, or change the reviewers.
- **Assignment queue**: the newest bill versions and amendments waiting to be assigned or dismissed.
- **Department load**: each department's open work, and how much is overdue or waiting for approval.
- **Upcoming hearings**: the next two weeks of hearings, and whether the analysis is ready for each.

The tabs

My to-do is your own reviews. **Awaiting assignment**, **Analysis pending**, **Needs approval** and **Completed** are the full lists behind the four stages, and **All tasks** is every task in the session. The **Calendar** menu has upcoming events and the weekly calendar. **+ Custom task** adds analysis work that isn't tied to a bill version. Use the **Session** menu at the top to look at an earlier session.

> This overview is for administrators, liaisons and approvers. Reviewers open on **My to-do**, and you see only the tabs your role uses.

Coming from LobbyGov Legacy

This was **Bill Analysis**. The old Unassigned, Pending, Needs Approval, Completed, All Tasks, Assignment Queue, Reassign, Watch Bills, Deleted and Upcoming Events pages are the tabs here. The overview itself is new: the old menu opened straight onto a list.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

My to-do: your own bill analysis reviews

Your own bill analysis reviews this session, the most urgent first: **Sent back to you**, **Overdue**, **This week** and **Later**.

Where to find it

Open it from **Bill Analysis** in the left menu. What you see depends on your role and your plan.

Working through it

Each row's button is your next step:

- **Claim**: on a first-to-claim review, the first reviewer to claim it writes it, and the others don't need to.
- **Start** opens the review. Some departments also let you mark a bill no impact from here.
- **Continue** goes back to a review you've started. Answers save as you go.
- **Mark complete** or **Submit for approval** appears once the required answers are in.
- **Fix and resubmit** appears when an approver sends a review back. Their note is on the row.

Answers in means you've done your part of a shared review, and its lead reviewer finishes it.

Search, or narrow the list to one department. **Recently submitted**, on the side, is what you've finished lately.

> Administrators, liaisons and approvers have their own reviews here too. Work to assign or approve is on **Awaiting assignment** and **Needs approval**.

Coming from LobbyGov Legacy

This was the reviewer **To-do** list, with its Review Bill and Mark as Complete buttons.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Bill analysis work lists: assignment, pending, approval and completed

Every list here is one row per department's work on a bill, except **All tasks**, which is one row per bill. Each has search, filters, **Export CSV** and **Print**, and the **Session** menu at the top looks at an earlier session.

Where to find it

Open them from the Bill Analysis overview. What you see depends on your role and your plan.

Awaiting assignment

Department work with no reviewer yet. **Assign…** picks the reviewers, or tick several rows and **Assign** them together. Group by bill or by department, or narrow to one department or lead. The row's menu also marks a bill misassigned or no impact, or deletes the work. **Reviewer capacity**, on the side, shows who has room.

Analysis pending

Assigned and being reviewed. Each row shows every reviewer's progress. **Change…** swaps reviewers. The row's menu can close the work and mark it complete. **Needs a decision**, on the side, lists reviewers who have left and hearings that fall before a due date.

Needs approval

Reviews waiting for you to sign off. **Approve…** confirms the final position, priority and summary, or saves them without approving. **Send back…** returns a review to its reviewer with your comments. Narrow by stage, department, position or reviewer. **Who can approve**, on the side, shows each department's approvers.

Completed

Finished work, grouped by the month it was completed or by department. **Reopen…** sends it back for more work. **Revert…** undoes a misassigned mark. **Positions this session**, on the side, sums up where your departments landed.

All tasks

One row per bill, with its furthest stage and last activity. **Details** opens its departments. From here you can turn a task inactive or active, remove a department, or delete the task. **Hide dead bills** clears out bills that died.

> You see the lists your role uses. Reviewers work from **My to-do**.

Coming from LobbyGov Legacy

These were **Bill Analysis → Unassigned**, **Pending**, **Needs Approval** (or Needs Liaison Approval, Needs Approval and Needs Final Approval), **Completed** and **All Tasks**. **Send back** was "Reject Analysis and Return to Reviewer".

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

A bill analysis task: reviews, answers and approvals

One bill's analysis: each department reviewing it, their reviewers' answers, and the approvals.

Where to find it

Click a task on any bill analysis list. What you see depends on your role and your plan.

At the top

- The task's stage, due date, next hearing and lead department.
- **PDF** downloads the whole analysis. **Edit task** changes the due dates or the title, or adds departments.
- **Approve…** appears when a review is waiting for your approval.

Departments

Each department working on the bill has its own row: its stage, due date, reviewers, and the position and priority it recommends. **Show analysis** opens its answers.

- **Assign to reviewers** or **Change reviewers** picks who writes the review.
- **Approve…** signs off, or sends it on to the next approver. **Send back…** returns it to the reviewer with your comments.
- The ⋯ menu marks the bill misassigned to this department, or no impact, closes it, or reopens it.
- **Watching** lists departments that follow the bill without reviewing it. **Add a department** brings in another.

Your review

If you're a reviewer, your form is in **Your answers**:

- Answer the questions and choose a recommended position and priority. Answers save when you leave each field.
- **Use answers from your review of…** starts from an earlier review of the same bill or its companion, such as one of a previous version. Answers come across where the two forms ask the same question.
- **Save and mark complete** finishes your review. You can mark it **No impact**, or say the bill belongs with another department.
- On a first-to-claim task, press **Claim** first. Once someone claims it, the others don't need to write one.

On the side

- **Bill**: its status and each department's position, with links to the bill.
- **Files**: drop files to attach them, up to 50 MB each.
- **History**: everything that happened on the task, and the emails it sent.

> What you can do depends on your role. Reviewers write and complete their own reviews. Liaisons and approvers also manage reviewers and approve. Administrators can do everything, including setting the lead and deleting the task.

Coming from LobbyGov Legacy

This was the **Review Bill** page.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Create a bill analysis task

Create custom task is for one-off work not tied to a bill version, like a letter or hearing prep. **Create bill version task** and **Create amendment task** cover one version or amendment, from **Create Analysis Task** on a bill's page.

Where to find it

Start from **Create Analysis Task** on a bill's page, or from Bill Analysis. What you see depends on your role and your plan.

Task

A custom task needs a **Title**. **Instructions** and **Related bill or amendment** are optional; a related bill is context only. All three pages ask for the **Session** and any custom fields.

Departments

- Set each to **Review**, **Watch** (follows without reviewing) or **Skip**. At least one must review or watch.
- **Review** opens **Reviewers** (leave empty for the liaisons to assign), **Analysis form**, **One-time questions** and notes. **Make lead** names the lead where your account uses leads.
- Set the due date and time.

Attachments

Up to 10 MB each. **Send attachments with the alert emails** adds links to the emails.

Creating it

Create task leaves a custom task's form ready for another, and opens a version or amendment task.

> Enterprise admins can always use these. Liaisons and approvers can always create version and amendment tasks, and custom tasks where the account allows.

Coming from LobbyGov Legacy

This was **Bill Analysis → Add Custom Task**. Version and amendment tasks were added from a row on **Assignment Queue**. Tasks already made came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Assignment queue: new bill versions and striking amendments

New versions and striking amendments of bills your departments are already analysing this session, waiting for you to decide whether they need a new analysis.

Where to find it

In the left menu, under **Bill Analysis**, click **Assignment Queue**. What you see depends on your role and your plan.

What comes here

What happens to a new version or striking amendment is set in **Bill analysis settings**: make a task automatically, put it here, or do nothing. Only the kinds set to "put it in the assignment queue" come here. Nothing arrives for a bill that already has an active task for that version.

The queue

- **Needs review**: each new version or amendment, with the bill's status and when it arrived. Narrow it by type, or search by bill number, title or amendment.
- **Add to task** makes a new analysis task for it. Choose, for each department, **Review**, **Watch** or **Skip**, pick the lead and reviewers, and set the due date. The departments from the earlier task are filled in for you. Reviewers are emailed when you add it.
- **Dismiss…** sets it aside without a task. Nobody is emailed.
- **Added** shows what became a task and where that task is now. **Dismissed** shows what was set aside and by whom.

> This page is for administrators, liaisons and approvers.

Coming from LobbyGov Legacy

This was **Bill Analysis → Assignment Queue**, with its Already Added and Dismissed tabs.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Reassign: handle work marked misassigned

Work a department has marked misassigned, waiting for you to send elsewhere, dismiss or hand back.

Where to find it

Open it from **Bill Analysis** in the left menu. What you see depends on your role and your plan.

The list

- Each row shows the bill, the department that flagged it, its reason, the other departments on the bill, and any it suggested.
- Bills with a hearing soon come first, under **Hearing within a week**.

- Search, or narrow by **Flagged by**, **Lead** or custom field. The icons at the top export a CSV and print.
- **Recently handled**, on the side, covers the last 30 days.

On a row

- **Reassign…**: pick departments under **Send to** and set the due date. The bill goes to Awaiting assignment for each, and their liaisons are emailed if bill analysis emails are on. The flagging department stays on the task, marked misassigned. It's greyed out while a parent department must approve, or when every department is already on the bill.
- **Dismiss…** sends the bill nowhere. It moves to Completed as dismissed. Nobody is emailed.
- **Revert to**, in the ⋯ menu, removes the mark, the reason and the suggestions, and hands it back. Nobody is emailed.

> Only enterprise admins can open this page.

Coming from LobbyGov Legacy

This was **Bill Analysis → Reassign**. Work waiting there, with its reasons and suggested departments, came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Watch bills: follow bills without analysing them

The bills your departments follow without analysing them, one row per department watching a bill. Your account may use its own word for "watch", so the tab may have another name.

Where to find it

Open it from **Bill Analysis** in the left menu. What you see depends on your role and your plan.

The list

- Each row shows the bill, the department watching, **Other departments** and how far along they are, and **Task due** with any hearing.
- Search, or narrow by department, lead or custom field. The icons at the top export a CSV and print.
- **Hearings on watched bills** covers the next 14 days. **Recent bill actions** covers the last 14.

On a row

- **Start analysis…** moves the department from watching to reviewing.
- **Edit…** opens the task's edit panel.
- The ⋯ menu has **Bill details**, **Legislature page**, **Add to tracking list**, **History** (enterprise admins only) and **Files**.
- **Stop watching**, also in the ⋯ menu, emails nobody. Enterprise admins can use it, and liaisons where the department allows.

A watching department's liaisons get one email when the bill is added, then nothing more.

> Enterprise admins, liaisons and approvers can open this page, where the account allows watching.

Coming from LobbyGov Legacy

This was **Bill Analysis → Watch Bills**. Your watched bills came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Bill analysis calendar: upcoming hearings for analysed bills

Committee hearings for bills with an active analysis task. **Upcoming events** lists everything still to come; **Weekly calendar** shows one week at a time. Cancelled hearings are left out.

Where to find it

Open it from **Bill Analysis** in the left menu. What you see depends on your role and your plan.

On both pages

- Search by bill code or task. **Session** and **Department** narrow the list, and **State** shows when your account has more than one.
- The task's name opens the task. **Agenda** opens the agenda where there is one.

Upcoming events

- **Departments and status** shows where each department's work stands.
- **Event** gives the hearing type, time, meeting and room.
- **Add to calendar** downloads the calendar entry, then reads **In your calendar**.

Weekly calendar

Week picks the week, from two weeks before the one showing to five after. Weeks run Monday to Sunday, with hearings grouped by day.

> Only enterprise admins can open Upcoming events. Anyone with a bill analysis role can open the Weekly calendar.

Coming from LobbyGov Legacy

Upcoming events was **Bill Analysis → Upcoming Events**. The weekly calendar is new for most accounts. Both read your analysis tasks, which came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Hearing manager: prepare departments for committee hearings

What each department is preparing for the committee hearings on the calendar.

Where to find it

Open it from **Bill Analysis** in the left menu. What you see depends on your role and your plan.

The list

- Each row is a hearing: when it is, when preparation is due, who is preparing, and how far they've got.
- Filter by **When** (upcoming, past or all), by department and by status, or search for a committee.
- **Assign a hearing** gives one to a reviewer: pick the hearing and the agenda items, the reviewer, the form they fill in, the due date, and whether it needs approval when done.
- **Forms** is where you write what a department is asked to fill in.

A hearing

- **Your preparation** is the form you were given. **Save for now** keeps your answers; **Mark complete** hands it in.
- Where it needs approval, the approver can **Sign off** or **Send back to the reviewer** with a note, which goes to the reviewer by email.
- **Download PDF** gives everyone's preparation in one document. **Change** and **Delete** are for whoever assigns hearings.

Forms

Make a form, then **Add a question** for each thing you want answered. Drag questions to reorder them. **Copy** starts a new form from an old one; **Retire** stops a form being offered.

Coming from LobbyGov Legacy

This was the **Hearings Manager**: Upcoming Hearings, Past Hearings, Hearing Tasks, Needs Approval and Templates. Your hearing tasks and forms came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Analysis Views: saved tables of bills and answers

Saved tables of bills and analysis answers. You read them on **Analysis Views**; admins build them on **Manage Views**.

Where to find it

In the left menu, under **Bill Analysis**, click **Analysis Views**. What you see depends on your role and your plan.

Reading a view

- The tabs are the views you can open.
- Search and the choices above the table, such as **Stage** or **Reviewer**, narrow it for you alone. **Reset** clears them.
- **Export CSV** downloads it.

Managing views

New view or **Edit** opens one panel, saved together.

- **Columns**: a view needs at least one.
- **Answers shown**: whose analysis answers appear.
- **Filters**: apply to everyone who opens it.
- **Offered to**: the roles that see it. Liaisons, approvers and reviewers also need that role in one of its departments.
- **Show on Analysis views**: off hides it from everyone.
- **Public link**: anyone with the link can see it without signing in. **Make a new link** stops the old one working.

> Only enterprise admins can open Manage Views.

Coming from LobbyGov Legacy

These were **Custom Views** and **Dashboard Manager** under **Bill Analysis → Configuration**. Both are views here. Views that were displaying came over with your account; hidden ones and button columns didn't. Public links have a new address here, so share the new one once you've moved over.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Analysis Reports: Excel exports of bill analysis work

Excel exports of your departments' bill analysis work. Each runs in the background and lands under **Recent files**.

Where to find it

In the left menu, under **Bill Analysis**, click **Analysis Reports**. What you see depends on your role and your plan.

Running one

Covers, at the top, picks the session and department for all four reports. **Run** asks for a file name, then **Generate** starts it.

- **Summary**: bill by bill, grouped by department, with assignments, recommendations and every answer to the template questions.
- **All tasks**: every tracked bill with its task status, department assignments and custom field data.
- **Daily assignment**: bills added to tracking lists on the **Day** you pick.
- **Upcoming events**: committee hearings for your tracked bills. **Look ahead** sets 7 to 90 days.

Recent files

Your last 50 files from this page. **Download** appears once a file is finished. The trash icon deletes a file for good, though you can run the report again.

> Enterprise admins, liaisons, approvers and reviewers can open this page.

Coming from LobbyGov Legacy

These were under **Reports → Generate**: Bill Analysis Summary Report, Assignment Report (All Dates), Daily Assignment Report and Upcoming Events Report. Files you made there aren't listed under **Recent files**. Saved settings for them came over as saved reports, which this page doesn't use.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Deleted: restore bill analysis tasks and departments

Tasks deleted in the last 7 days, and departments deleted from live tasks in that time, so you can put them back.

Where to find it

Open it from **Bill Analysis** in the left menu. What you see depends on your role and your plan.

The list

- **Leaves this list soon** comes first, then **Deleted this week**. Each row says when it leaves and who deleted it.
- A row marks the whole task as deleted, or strikes through the departments deleted from it, with the stage each had reached.
- Search by bill number or title, or narrow by **Deleted by** and by **Everything**, **Tasks** or **Departments**.

Restoring

- **Restore…** says what comes back and asks you to confirm.
- Work returns at the stage it was in, with its reviewers and their answers. Nobody is emailed.
- Restoring a task brings back its departments and watches. A department deleted before the task stays deleted, and can be restored here afterwards.
- A restored department won't be the lead if another leads now.

> Only enterprise admins can open this page.

Coming from LobbyGov Legacy

This was **Bill Analysis → Deleted**, with the same 7 days. Tasks and departments deleted there came over still deleted, with their dates, so older deletions don't list here.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Bill Analysis Setup

Departments, forms, workflows and settings for admins.

Bill analysis settings: how analysis runs for your account

The switches that decide how bill analysis runs for your account. Use the sections on the left to move around the page, then save.

Where to find it

In the left menu, under **Bill Analysis**, click **Analysis Settings**. What you see depends on your role and your plan.

The sections

- **Naming and defaults**: what you call a department, and the due date and time new work gets.
- **How the work runs**: who shares one analysis, whether a lead department is named, whether liaisons assign reviewers, and first to claim.
- **New versions**: whether a new version or striking amendment of a bill under analysis gets its own task, goes to the Assignment queue, or does nothing.
- **Approval**: who approves a completed review, which positions and priorities need approval, and parent department sign-off.
- **Tracking lists**: whether the position and priority you settle on are copied onto your tracking lists, and which ones.
- **Hearings**: turns the Hearing manager on, and who may assign hearing preparation.
- **Who may do what**: what liaisons, approvers and reviewers may each do.
- **Email**: which bill analysis emails are sent, and to whom.

Departments

Editing for switches between the account and one department. A department can have its own settings for some sections. While they're on, they replace the account's settings for that department entirely; switch them off and the department follows the account again.

Coming from LobbyGov Legacy

This was the enterprise **Settings**. Your settings came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Departments: where bill analysis work goes and who does it

The departments bill analysis work goes to, and who holds which role in each.

Where to find it

In the left menu, under **Bill Analysis**, click **Departments**. What you see depends on your role and your plan.

The list

- Each row shows the department's open work in the session you've picked, then its people by role, tracking list and contact.
- **Needs attention** names departments missing a liaison or approver your settings give a job to. **Sits under** sets out how sub-departments behave on your account.

Editing a department

New department or **Edit…** opens one panel.

- Click a role beside a person to switch it. Nobody can hold a role they don't have on the account.
- If someone stops reviewing with open reviews, saving asks whether to remove them from each task or mark their review complete.

The ⋯ menu

- **Sharing…** lets members also see the analysis of departments you pick.
- **Settings for this department** opens its own settings.
- **Make inactive…** stops new work. Open bills leave Awaiting assignment, Analysis pending and Reassign. Members and history stay.
- **Delete…** appears only for a department that has never had work.

> Only enterprise admins can open this page.

Coming from LobbyGov Legacy

This was **Bill Analysis → Configuration → Departments** (or your word for them). Members were set on **Liaisons/Reviewers**. Your departments, members and sharing came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Analysis Forms: the questions reviewers answer

The forms reviewers fill in about a bill.

Where to find it

In the left menu, under **Bill Analysis**, click **Analysis Forms**. What you see depends on your role and your plan.

The forms

- **New form** starts empty, and **Copy questions from** fills it from another.
- New tasks use the **Default** form unless someone picks another. **Make default** sets it.
- **Make inactive**, in the ⋯ menu, stops a form being offered for new tasks. So does **Delete form**. Reviews that used it keep it either way.

Also asks

Whether reviewers on this form see **Recommended position**, **Recommended priority**, **No impact** and **Misassigned**: **Show**, **Hide** or **Department decides**. **Set by department settings** means account settings don't let reviewers set it.

Questions

- **Add question** or **Add section** (a heading) opens a panel: the **Kind**, the wording, **Guidance for reviewers** and any **Options**.
- **Required** means reviewers must answer before marking their review complete, unless they mark it No impact or misassigned.
- Grid questions can't be edited here.
- Changes reach reviews in progress. Finished reviews keep the questions they answered.

> Only enterprise admins can open this page.

Coming from LobbyGov Legacy

This was the **Templates** tab of **Bill Analysis → Configuration → Questions & Templates**. Your templates and their answers came over with your account. Answers to the older **Analysis/Review Questions** came over too; those aren't forms, so aren't listed here.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Analysis Custom Fields: your own fields on analysis tasks

Your own fields on an analysis task, filled in when bills are added. These belong to analyses: the custom fields on tracking lists are a separate set.

Where to find it

In the left menu, under **Bill Analysis**, click **Analysis Custom Fields**. What you see depends on your role and your plan.

The list

- Drag the handle to set the order on forms and lists.
- **Delete**, in the ⋯ menu, takes a field off forms, task pages and lists. What was entered is kept but hidden.

A field

New field sets:

- **Type**: **Dropdown** and **Checkboxes** take **Options**. Those under **Choose from your account** pick departments or users.
- **One value for**: **Each task**, or **The bill, shared by its tasks**, where setting it on one task sets it on your other tasks for that bill, in any session.
- **Show it on the analysis lists**: also puts it in their CSV exports.
- **Department liaisons may set it on the task**: liaisons and approvers can fill it in under Details.

Any field can be a column in an analysis view.

> Only enterprise admins can open this page.

Coming from LobbyGov Legacy

This was the **Custom Fields** tab of **Bill Analysis → Configuration → Settings**, not **Preferences → Custom Fields**, which was for tracking lists. Your fields, their options and what was entered came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Analysis Triggers: add approved bills to tracking lists automatically

Rules that put a bill on a tracking list when a department's review gets final approval with a position or priority you've named.

Where to find it

In the left menu, under **Bill Analysis**, click **Analysis Triggers**. What you see depends on your role and your plan.

The list

- The line at the top says whether triggers are on for your account. While they're off, triggers add nothing. Only LobbyGov support can change this.
- Every matching trigger runs, so order is only for display.
- The ⋯ menu has **Switch off** and **Delete**.

A trigger

New trigger or **Edit** sets **Applies to**, the **Position** and **Priority** that run it (any one is enough), and the lists under **Adds the bill to**. A department's own list is the one set on Departments. A department without one adds nothing there.

When nothing is added

- The bill is already on the list. If someone removed it, a later approval can add it back.
- The review has no position or priority, like No impact, or completed without approval.

> Only enterprise admins can open this page.

Coming from LobbyGov Legacy

This was the **Triggers** tab of **Bill Analysis → Configuration → Settings**. Your triggers came over with your account. A trigger now only runs when it's switched on and its own conditions match, so some may add fewer bills than they did there.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Analysis Workflows: custom approval steps and emails

Approval steps and emails for submitted reviews, in place of the usual liaison and approver steps.

Where to find it

In the left menu, under **Bill Analysis**, click **Analysis Workflows**. What you see depends on your role and your plan.

The list

Workflows are listed in the order a review checks them, most specific first. If no route matches, the next is checked. If none matches, the usual steps apply.

- **New workflow** does nothing until it has a route.
- **Process map**, in the ⋯ menu, writes a workflow out in words.
- **Try it** shows where a task's review would go. Nothing is changed or sent.

A workflow

- **What it covers**: **Departments**, **When the department is** and **Tasks**.
- **Approval routes**: the first that matches decides who approves. **Edit conditions** sets the positions or priorities, or **Matches every task**.
- **Add step**: one approval finishes a step. A step with nobody in it waits for an administrator.
- **Who is emailed**: who hears at each stage. Each step's people are also emailed when it starts, if the department's email alerts are on.

Save workflow applies to reviews submitted from now on. Reviews partway through finish on their current steps.

> Only enterprise admins can open this page.

Coming from LobbyGov Legacy

This was the **Workflows** tab of **Bill Analysis** → **Configuration** → **Settings**. Your workflows and past approvals came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Groups: named sets of people for approval steps

A group is a named set of people, such as "Budget Office". A bill analysis workflow can limit an approval step to a group, and then only its members are asked to approve.

Where to find it

In the left menu, under **Users & Access**, click **Groups**. What you see depends on your role and your plan.

Your groups

- **New group** names one. Add people once it's saved.

- **Members** (or **Manage members** in the ⋯ menu) opens the people on the account. Tick who belongs, filter by user type or department, or use **Approvers**, **Liaisons** or **Reviewers** to tick everyone with that role.
- **Used by** says how many approval steps name the group. A warning shows when a step has nobody to ask, because the group is empty or inactive.
- **Rename** and **Delete** are in the ⋯ menu. **Include inactive** shows groups that are switched off.

> Deleting a group, or switching it off, leaves the steps that name it with no approvers. Check **Used by** first.

Coming from LobbyGov Legacy

This was the **User Groups** tab of the enterprise user tools. Your groups and their members came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Hidden Pages: choose which pages each role can open

Choose which pages liaisons, approvers, reviewers and view-only users can open.

Where to find it

In the left menu, under **Settings**, click **Hidden Pages**. What you see depends on your role and your plan.

The switches

- Each role has a switch for each page. Turn one off and that page leaves the role's menu; opened from a link, it says they don't have access.
- Reviewers and view-only users share one set of switches.
- Changes save as you make them.

Who this affects

- Only people whose roles are liaison, approver, reviewer or view-only. Admins, regular users and super users always see their pages.
- Someone with more than one of these roles can open a page if any of their roles can.
- The side column counts how many people have each role.

> Only enterprise admins can open this page.

Coming from LobbyGov Legacy

These were the **Hide…** switches in the enterprise **Settings**. Your choices came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Users and Access

People, groups, single sign-on and the sandbox.

The Users page: everyone on your account and what they can see

Everyone on your account: who they are, what they can see, and whether they're signed in recently.

Where to find it

In the left menu, under **Users & Access**, click **Users**. What you see depends on your role and your plan.

The list

- **Find a person** searches by name or email. The filter shows everyone, people who need attention (invitations about to expire, no access set), people who haven't signed in for a year, people with no access, and inactive people.
- **Access** is what each person can do: a super user sees everything, others have the features, pages and clients you've given them.
- **Status** shows whether someone is active, inactive, or invited and how long the invitation has left.
- **Export CSV** downloads the list.

Adding people

Invite a person emails them a link to join, which lasts 7 days. Choose their user type, and either set their permissions or copy another person's. Until they accept, the row's menu can resend or cancel the invitation. Invitations count toward your plan's seats.

Changing what someone can do

Click a person to edit their permissions:

- **User type**: regular user, super user, or billing only.
- **Features** and **Pages** they can use.
- **Clients**: viewer, editor or manager on each, and which of its lists they see.
- On Bill Analysis accounts, their role (liaison, reviewer, approver…), departments and approval groups.

The row's menu also edits a person's details (name, email, username, time zone) and can set a new password for them, makes them inactive, or removes them. Someone with open reviews needs those settled first.

Tick several people to make them active or inactive, copy permissions to them, or remove them together.

> Only super users can open this page. Nobody can change the account owner here, or remove their own super user access.

Coming from LobbyGov Legacy

This was **Account Settings → Subusers & Sharing**. Your users and their permissions came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Import users from a CSV file

Add up to 500 people at once from a CSV file. Nobody is added until you've checked the preview and confirmed.

Where to find it

Open **Users** under **Users & Access**, then choose to import. What you see depends on your role and your plan.

Step by step

1. Choose **what the file sets**: each person's **user type and features**, or their **Bill analysis roles and departments**.
2. Choose **how people get in**: **Send an invitation**, so they set their own password, or **Create them with a generated password**.
3. **Download CSV template** for the columns that choice needs. Use yes or no for each feature or role, and separate department IDs with a | character.
4. Upload the file and press **Check file**. If anything in it is wrong, the problems are listed and nothing is added until you upload a corrected file.
5. Check the preview, then **Send invitations** or **Create users**.

> Generated passwords are shown once, on this page, and aren't emailed. Copy them before you leave.

Coming from LobbyGov Legacy

This was **Import Users**, a button on the Subusers page and in the enterprise user tools.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Single sign-on: sign in through your identity provider

Let people sign in through your organization's identity provider, such as Microsoft Entra ID or Okta, instead of with a LobbyGov password.

Where to find it

In the left menu, under **Users & Access**, click **Single sign-on**. What you see depends on your role and your plan.

Setting it up

1. **Get the details for IT** puts LobbyGov's reply URL and identifier under **For your IT team**.
2. Enter what IT sends back under **Identity provider**: **Paste metadata** fills in the fields, or type them yourself. Then **Save**.
3. Turn on the switch under **Sign-in**. Saving doesn't turn anything on.

The settings

- **Signing certificate** warns you **Expires soon** or **Expired**.
- **Matching people**: the username first, then the email. With both blank, the response's NameID is used.
- **New people**: **Add them on their first sign-in** makes someone your provider lets in a reviewer, with an optional department, client and list.

Turning it off

People who can only use single sign-on may have no password, and would need "Forgot your password?" to get in.

> Only super users can open this page. A setup shared with other accounts can't be changed here.

Coming from LobbyGov Legacy

This was the **SAML Configuration** tab of **Account Settings → Subusers & Sharing**. Your provider's details and on/off setting came over. Your IT team only adds the reply URL shown under **For your IT team** to your existing LobbyGov app.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

User History: a record of bulk changes to users

A record of the changes made with the bulk actions on the Users page, newest first.

Where to find it

In the left menu, under **Users & Access**, click **History**. What you see depends on your role and your plan.

The list

Each row shows when the change was made, who made it, the person it was made to, what was done, and the details. Fifty rows to a page.

Changes made one person at a time aren't listed here, only bulk ones: making people active or inactive, copying permissions, adding or removing roles, departments and groups, and removing people.

> Only super users can open this page.

Coming from LobbyGov Legacy

This was **User Audit History**, beside the enterprise user tools. Its entries came over with your account.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

The Sandbox: a practice copy of your account for training

A practice copy of your account for training, with the same clients, lists and bills. Nothing done in it sends email, bills anyone or reaches a client.

Where to find it

In the left menu, under **Settings**, click **Sandbox**. What you see depends on your role and your plan.

Who can use it

- The **Sandbox access** switch beside each person gives or removes access, and saves as you change it.
- People with access find the sandbox in the account switcher, marked **Sandbox · practice copy**. Taking access away changes nothing about their live account.
- **Grant everyone** and **Revoke everyone** change the whole account at once.

Start the training data over

Empty the sandbox removes every client, list, bill, note and watch in the sandbox. There is one sandbox per account, so this removes everyone's practice work, not just yours, and it can't be undone. The live account isn't touched, and nobody loses access. Ask LobbyGov to copy your account in again when you need it back.

No sandbox yet

LobbyGov sets up each sandbox. Until then this page says **No sandbox yet**: ask us and we'll copy your clients and lists into it.

> Only super users can open this page, and not from inside the sandbox.

Coming from LobbyGov Legacy

LobbyGov Legacy had no sandbox. This page is new.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Account and Settings

Your profile, notifications and billing.

Your profile: name, photo and how you sign in to LobbyGov with AI

Your name, photo and how you sign in. Changes save as you make them.

Where to find it

In the left menu, under **Settings**, click **Profile**. What you see depends on your role and your plan.

About you

- **Photo**: shown next to your notes and in your account's history. JPG, PNG or GIF up to 1 MB.
- **Name** and **Phone**.
- **Timezone**: the times you see for hearings and meetings everywhere in LobbyGov.

Sign-in

- **Email** is what you sign in with. **Change…** asks for your password and sends a link to the new address to confirm it.
- **Username** is shown to your account's admins. You can also sign in with it.
- **Change password…** needs your current password. If you've forgotten it, use **Email me a reset link**.
- **Two-factor authentication** asks for a code from an authenticator app each time you sign in. Keep the recovery codes it gives you somewhere safe: they're shown only once.

> If your organization signs you in through its own system (single sign-on), your name, email and password are managed there, not here.

Elsewhere

- What LobbyGov emails you is under **Notifications**.
- To switch to another account you belong to, use the menu under your name at the bottom of the sidebar.

Coming from LobbyGov Legacy

This was **Account Settings → Your Profile**. Your password came over with your account. Two-factor authentication didn't: turn it on again here, with any authenticator app.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Notification settings: choose what LobbyGov emails you

What LobbyGov emails you. Everything here comes in **one email on weekday mornings at 7:15 Pacific**, and a day with nothing to report sends nothing. Changes save as you make them.

Where to find it

In the left menu, under **Settings**, click **Notifications**. What you see depends on your role and your plan.

The settings

- **Daily snapshot**: what changed on the bills you track. Under **Bill tracking**, choose bill updates (referrals, hearings, votes, amendments, signatures), hearings today, and cutoff deadlines this week. These need the snapshot on.
- **Keywords & statutes**: new bills that match a keyword or amend a statute you follow. These come even with the snapshot off.
- **Rulemaking**: a new issue of the State Register, and new filings that match what you follow.
- **From LobbyGov**: product updates and the newsletter, sent on their own.

Which clients

The table chooses which clients each alert covers. Untick a client to leave it out, or open one to choose particular lists for bill updates and hearings. With every client ticked, new clients are included as they're added.

Also

- **Read past emails** shows what you've been sent.
- Alerts for bills on your watch list are set on the watch list itself: in **Bill Explorer**, show your watch list and use **Alerts**.
- To change the address the email goes to, edit your **Profile**.

Coming from LobbyGov Legacy

This was the **Notification Center**. Your old email settings did not carry over, so nothing is sent until you turn on what you want. The clients you had chosen for keyword, statute and rulemaking alerts did carry over.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

The Notifications page: read back what LobbyGov sent you

What LobbyGov has sent you, kept where you can read it back. The bell at the top of every page opens it. This page only shows what was sent; to choose what you get, use the **notification settings** link under the title.

Where to find it

Click the bell at the top of any page. What you see depends on your role and your plan.

What shows here

- **Your daily email**, arranged by client. Each bill's code opens its page. Where a section was long, a line says how many more were in the email.
- **Your report is ready**, when a report you ran has finished. **Download** gets the file. This one isn't emailed.
- Each entry is a saved copy, so it still says what it said on the day it was sent, even if a bill has moved since.
- Only what belongs to the account you're working in shows, so anything from a sandbox stays in that sandbox.

Read and unread

Unread entries have a blue dot and a blue border, and the bell counts them. **Mark read** clears one, and **Download** does too. **Mark all read** clears them all.

Coming from LobbyGov Legacy

This page is new. The old **Notification Center** only held your email settings, so it had no list like this, and emails it sent aren't here.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Sidebar Folders: choose which clients the side menu lists

Choose which of your clients the side menu lists, so the ones you use every day aren't buried.

Where to find it

In the left menu, under **Settings**, click **Sidebar Folders**. What you see depends on your role and your plan.

Showing and hiding

- Each client with lists you can open has a switch. Turn it off to take that client out of your side menu.
- **Show all** and **Hide all** flip every switch at once.
- Changes save as you make them. The menu catches up on the next page you open.

What hiding doesn't do

- Only your menu changes. Nobody else's menu is affected.
- Hidden clients and their lists still open from search, and their email alerts keep coming.

> Everyone can set their own. A client shows up here once you've been given a list in it.

Coming from LobbyGov Legacy

This was **Preferences → Clients and Lists**. The clients you had hidden there are still hidden.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

Your account may use its own word for "client". These articles say "client" throughout.

Billing: your plan, invoices and payments

See your plan, keep your billing contact details current, and read your invoices and payments. **Account** chooses which account, if you have several.

Where to find it

Click your name at the bottom of the left menu, then **Billing Overview**, **Invoices** or **Transactions**. What you see depends on your role and your plan.

Overview & Contact Info

- **Manage billing** opens Stripe's portal, for card details and cancelling. It appears once the account has a Stripe customer.
- **Choose a plan** appears when the account has no subscription. **Annual** or **Monthly** sets the prices; **Continue** goes to checkout.
- Accounts in Washington need a physical address for sales tax. **Same as mailing** copies it over.

Invoices and Transactions

- **Invoices**: **Applied** is discounts, credits and payments, less refunds. Open one for its line items and **Download PDF** or **Print / Save PDF**.
- **Transactions**: processed payments and refunds, each with **View receipt**.

Billed through LobbyGov Legacy

If the overview says this, invoices still come from LobbyGov Legacy, so there's nothing to pay here and no plan to choose. We'll let you know before that changes.

> Only super users and billing users can open these pages.

Coming from LobbyGov Legacy

This was **Account Settings** → **Billing Details**, with **Subscribe** for choosing a plan. Invoices brought over from LobbyGov Legacy are marked **Archived**. **Credit Card Info** is now **Manage billing**; old subscriptions did not come over.

This help is also inside LobbyGov: click the **How ... works** link at the top of the page.

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