FiscalNote

GETTING STARTED GUIDE

Welcome to FiscalNote's issues management platform. We help organizations of all sizes manage the state, federal, and international issues that affect them most.

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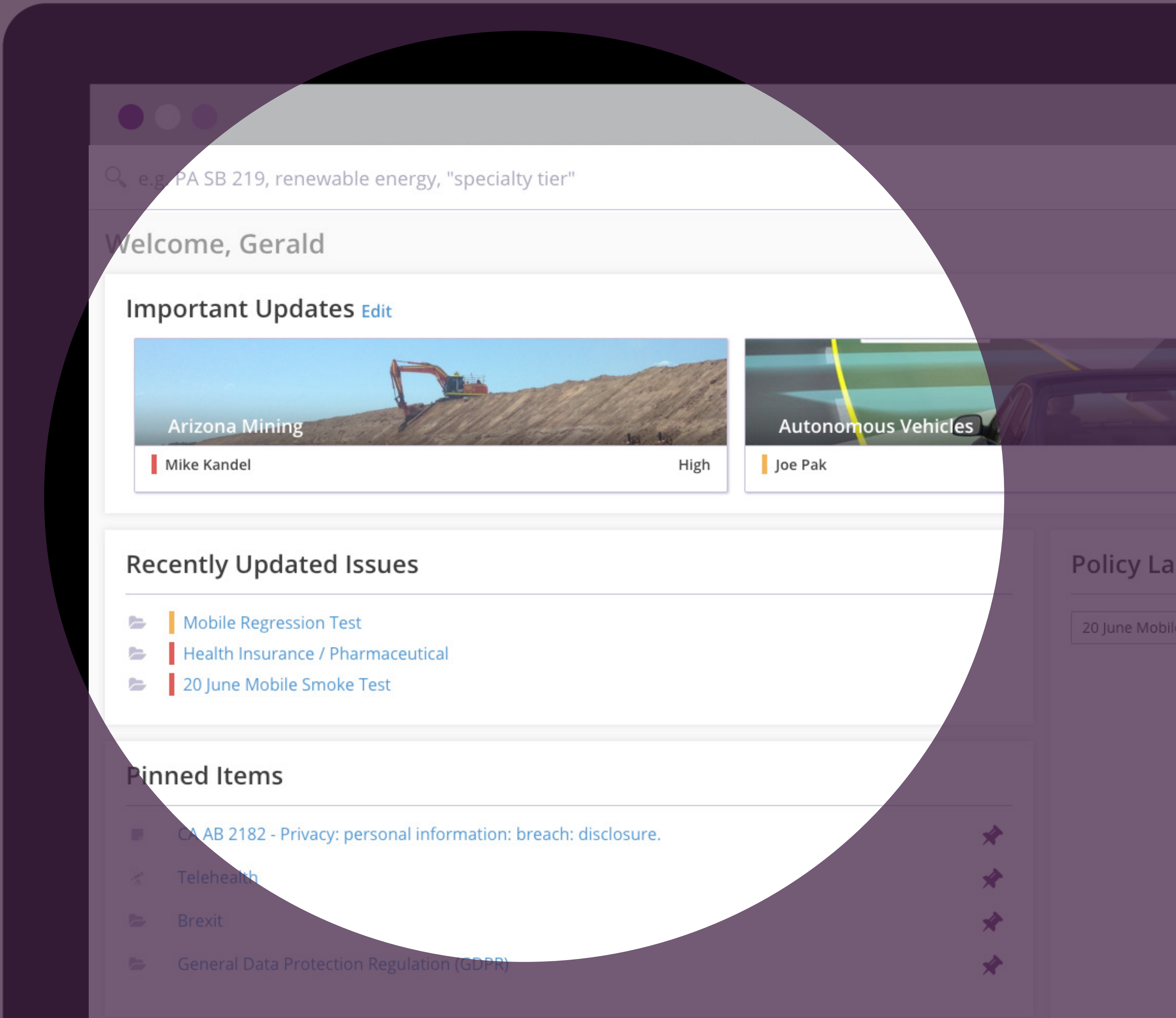
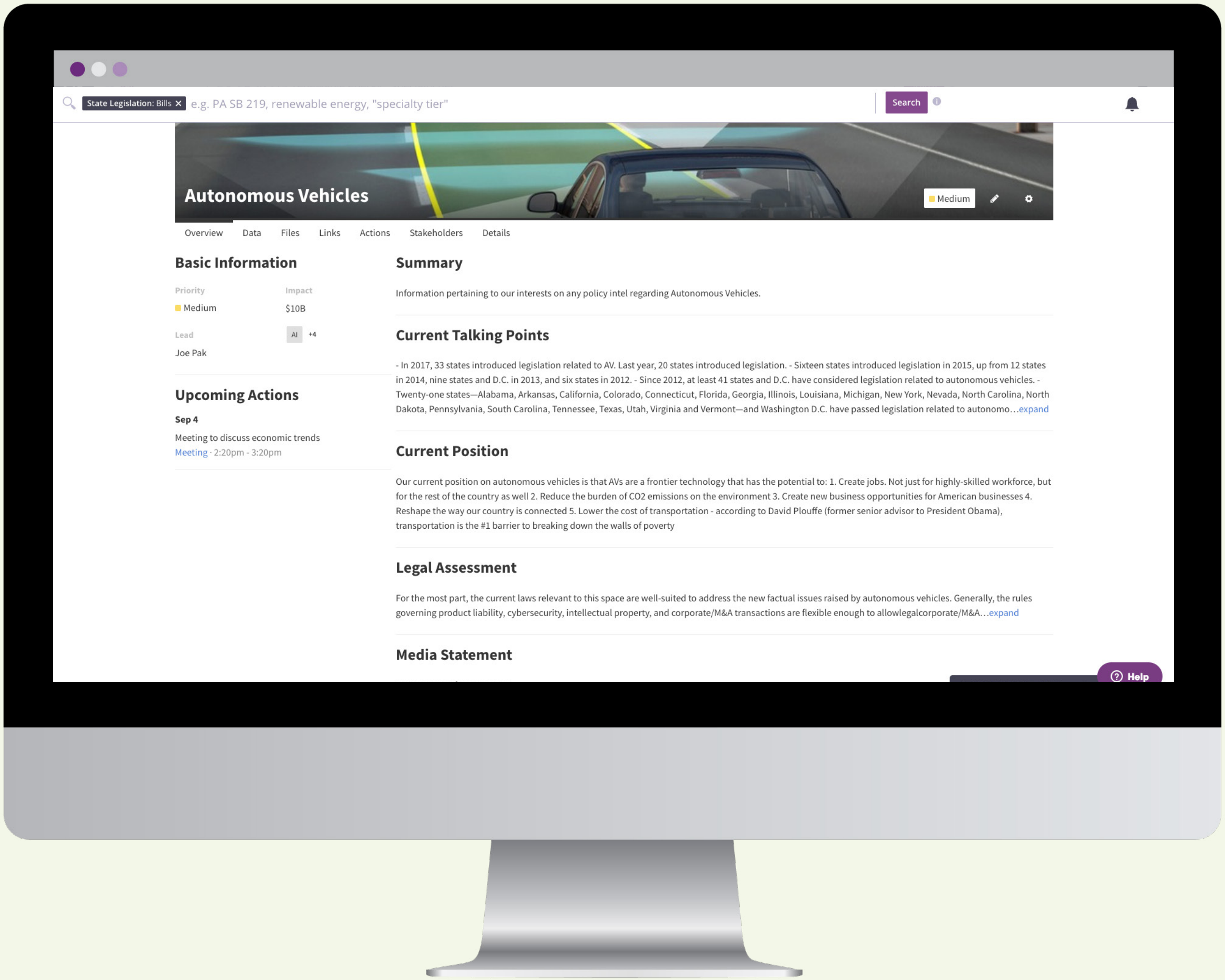


WELCOME TO FISCALNOTE!

Before you get started, take a minute to read this guide — it'll help you understand how to get the most from the platform and quickly integrate it into your everyday routine. The most important thing to remember about FiscalNote is that it's designed around the way you work — there's no "wrong way" to use the platform if it helps you work more efficiently. However, there are a couple of key workflows that the majority of FiscalNote clients rely on to manage issues more effectively, interpret information, and connect their actions to outcomes. So let's take a few minutes to go over them now, and get you started on the right track.



ISSUES MANAGEMENT

FiscalNote's platform is primarily built to allow organizations to effectively respond to and strategize against public policy actions and reputational issues. That's why the primary component of your workflow is the Issue, which allows you to store and manage news, documents, legislative and regulatory developments, stakeholders, and even related tasks in one central location.

Each client defines an Issue the way they see fit. We do, however, see common themes across clients in how they scope, prioritize, and structure their Issues. Examples include:

- Top public policy priorities for your organization
- Key geographies you operate in such as U.S. states or international countries
- Important events you're attending such as conferences or summits
- Reputational risks that arise
- Geopolitical events
- Business development opportunities in different markets or geographies

Now that you know what Issues are, let's get started on creating them.

ISSUES

To start, simply click the Issues icon located in the main navigation sidebar. Here, click the purple "+Add" button to create an Issue. Once you've named the Issue, you can input other helpful information like labels, priorities, impact (financial or otherwise), and a summary. If you are a Delegated Administrator of FiscalNote, you can limit the Issue to particular Groups within your organization.

You can now start populating Issues with the information and data that's relevant to you and your organization, such as:

- **Data**, whether legislative or regulatory, related to that Issue
- **Files** such as documents, presentations, PDFs, or images
- **Links** such as online news articles, research studies, or internal resources
- **Actions**, such as events, tasks, or activities that you or your team are performing while executing your issue strategy
- **Stakeholders**, whether internal or external, that are involved or influence the issue. These may include customers, legislators, members of the media, committees, or your own Custom Contacts
- **Details**, which allow you or a subject matter expert to provide more context on the Issue, which can then be populated in the Overview tab

This workspace provides an easy, flexible way to share the right information about the Issue with the right people in the right context.

Here are some best practices on what information to include in the Details and Overview sections.

- Summary or stance
- Talking points
- "What are we doing about this?"
- Action plan
- Reputational, legal, or economic impact assessments
- Field or consultant research

RESEARCH & CONSUMPTION

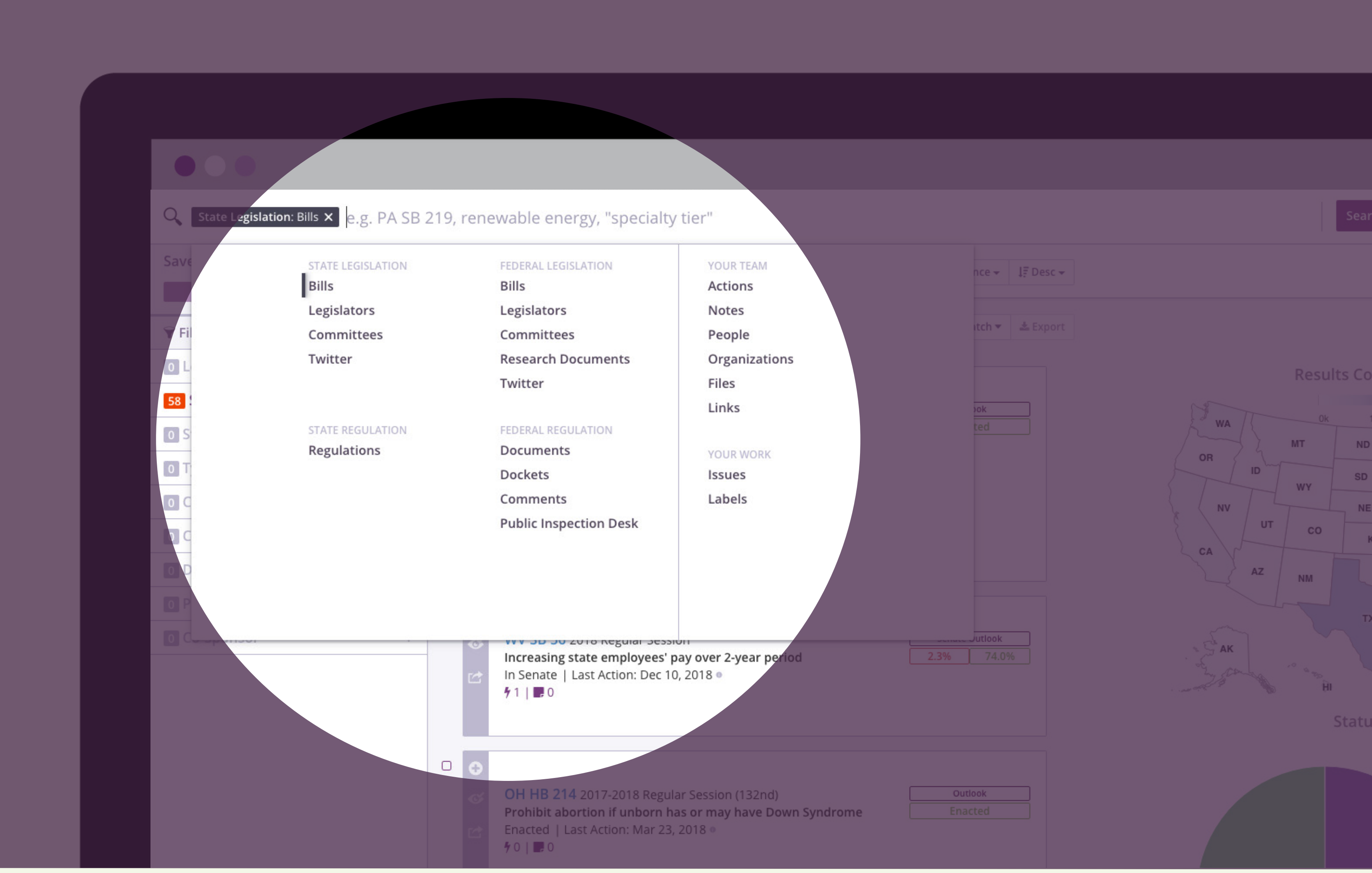
Accessing and monitoring legislative, regulatory, or media developments are important components of any issues management strategy. Here are some tools that allow you to access data on the platform.

Discovery

The most efficient way to discover new bills and regulations (either state, federal, or international) on an ongoing basis is to set up a **Discovery Alert**. You can tailor these alerts to include or exclude just about anything, and our Product Engagement team can help you create the right ones. You can also set an alert to send you individual email notifications when something is discovered, or a summary digest on a daily or weekly basis.

To create a new alert, or look at the status of your current alerts at any time, click the "Discovery Alert" icon from the navigation sidebar.

Once you've discovered an important bill or regulation (or if you already know of one you want to keep track of), you can keep track of it



as it moves through the legislative or regulatory process by adding it to a specific **Issue**. You can add as many bills or regulations to a particular Issue as you'd like and — just like Discovery Alerts — set up custom email alert settings for each one.

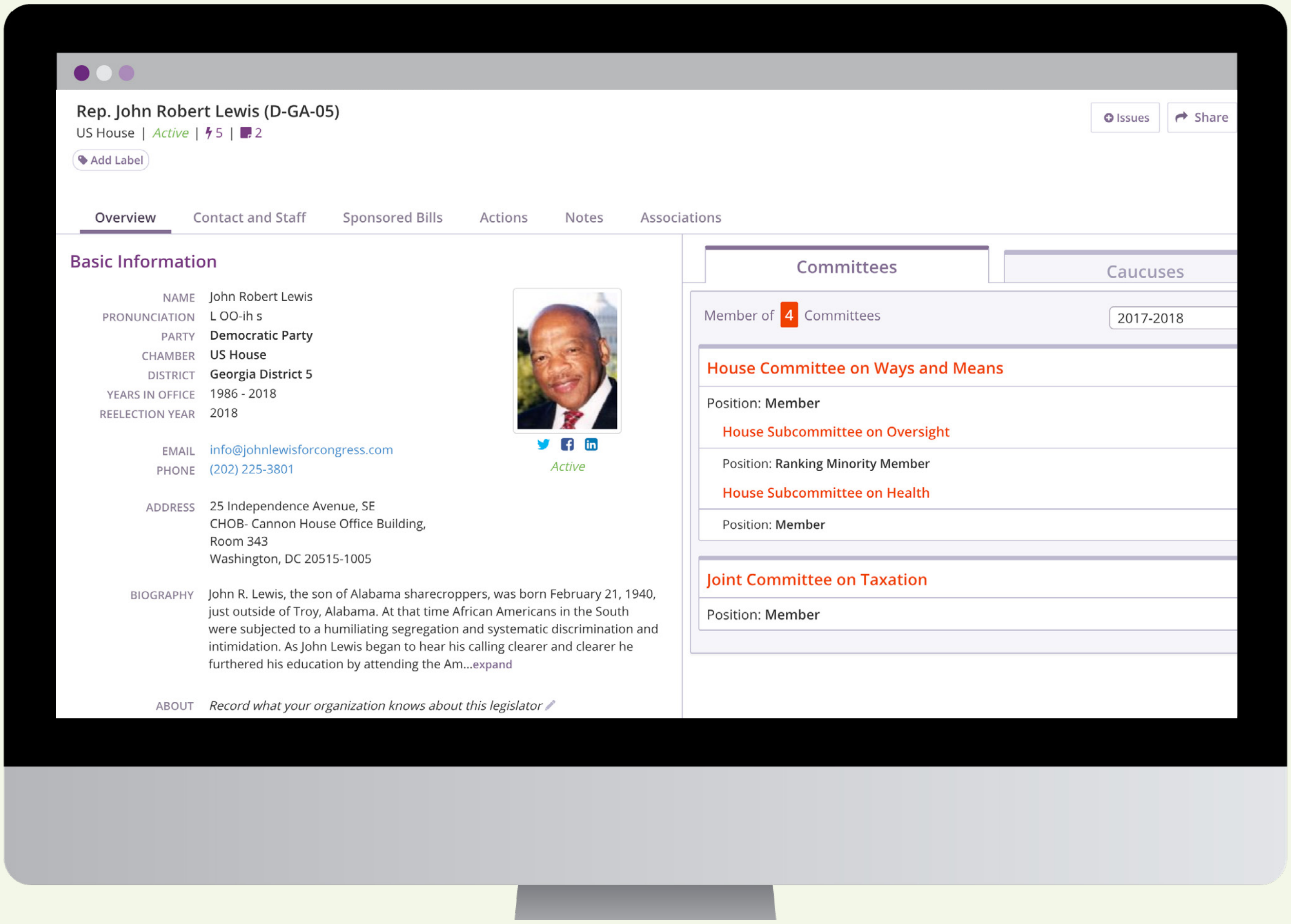
To add a bill or regulation to an Issue, click "+ Issue" in the upper right side of the bill or regulation page and select the corresponding Issue from the dropdown. To view any bills or regulations you are currently tracking relative to an Issue, click the Data tab in the corresponding Issue page.

Search

Sometimes, you don't know necessarily what you're looking for — and that's ok. FiscalNote's **Search** function allows you to search across all of the data on our platform, making it easy to explore new information.

To start, simply click the Search bar at the top of any page. Here, you will see a preview pane that allows you to select exactly what you're looking for.

When searching across U.S. data, for example, click on the specific data set you'd like to research such as Federal Committees or State Legislation. On the right of the preview pane, you will see that you can search across Your Team or Your Work. This will allow you to access collaboration data such as Actions and Labels. We'll provide more information on that later.



DATA

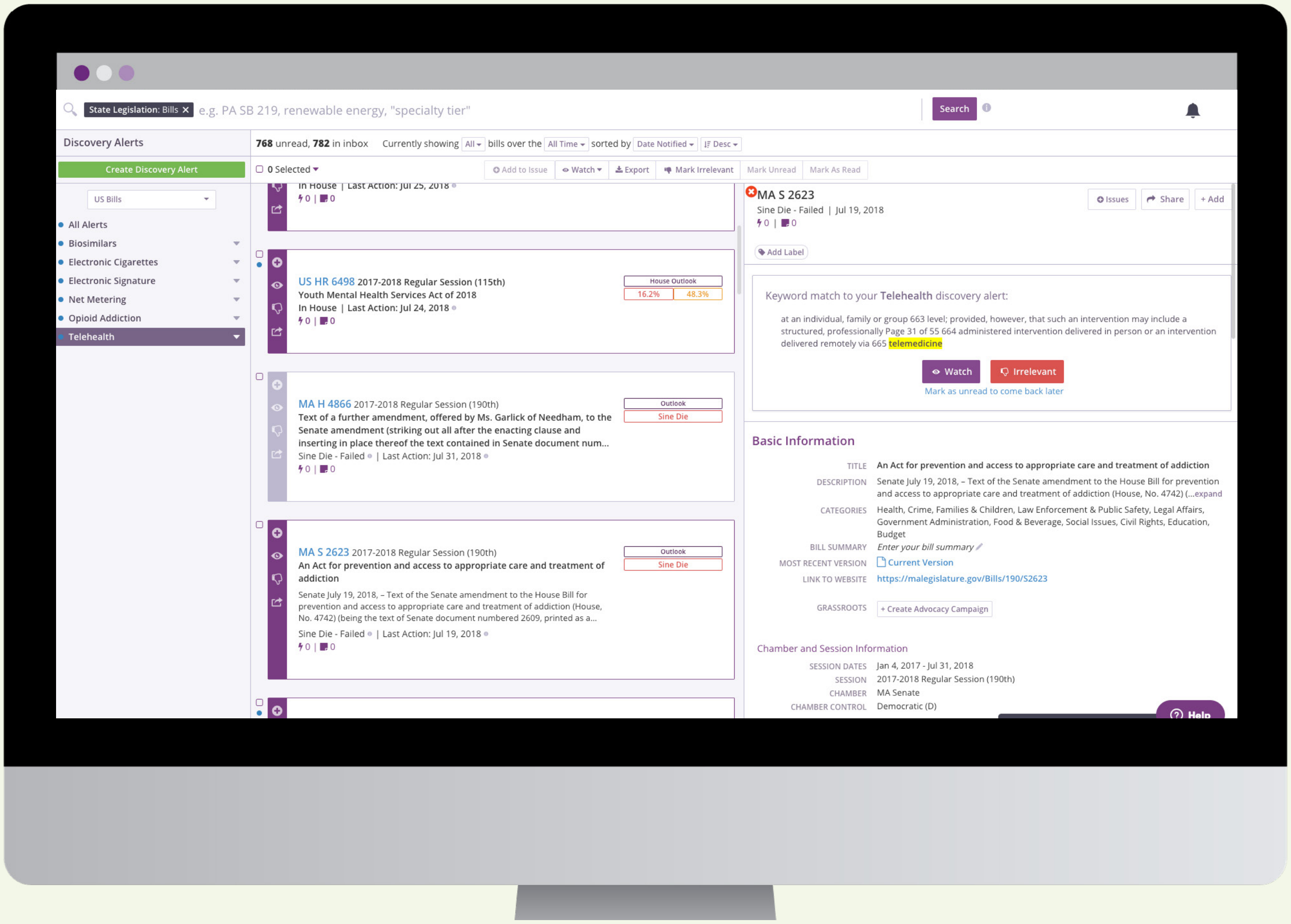
FiscalNote includes a massive amount of useful information you can start engaging with through the same tools described before. Here's a list of some major things you can access in the platform, and how to find them.

Legislators

FiscalNote contains detailed information on every state legislator and Member of Congress. To find someone, simply choose the type of legislator you're looking for from the search drop-down (state or federal) and enter all or part of the person's name. FiscalNote will display all of the matching results, and you can click on any of them to reveal a variety of biographical, ideological, and behavioral information. This includes :

- **Biographical information**, including contact information for them and their staff, re-election year, state, social media profiles, etc.
- How **effective** they are when sponsoring or co-sponsoring legislation in certain issue areas
- **Similar legislators** (even across party lines)
- **Committees & caucuses** they belong to
- Bills they've **sponsored**

REMINDER: You can add legislators, committees, and contacts to your Issues. Just click the **Add To Issues** button on any of those entity pages to add it to the relevant Issue.



- Direct **voting history**, plus general **voting tendencies** by issue and ideology
- Any **Actions** you've taken that involve them, and any **Notes** you've made in relation to them

Legislation

Most FiscalNote users set up their workflow to automatically find relevant bills and regulations through Discovery Alerts and Issues. However, you can always search for any piece of state or federal legislation and immediately gain insights from it by using Search.

To narrow your search results, use the filters on the left side of the screen to make your search a bit more specific — you can select the states you're interested in, issue categories, the date range, or even the bill sponsor, among a number of other factors.

When you find your bill, click the bill number in the result description to go to that bill's page, where you can see the following:

- Title, description, and full bill text
- Session information
- Sponsor and co-sponsors
- Any related documents or similar bills
- The FN Outlook, which assesses the likelihood of passage
- The Timeline, which summarizes the history of the bill
- Any upcoming or previous hearings
- Markups related to the bill
- Any votes the bill has gone through
- The Virtual Whipboard, which contains vote-by-vote predictions for both chambers, and can be adjusted based on your knowledge

- Any Actions you've taken that are related to the bill, and any Notes you've made on the bill (including a custom bill summary)
- Any Associations you've uploaded to that bill such as relevant files and web links such news articles

FiscalNote also makes it easy to access information related to bills or issues. For example, find GAO, CRS, or CBO Reports, in addition to Dear Colleague Letters, in the Search function under **Federal Legislation**.

Or, for **committee** information such as hearings or transcripts, search Committees under either Federal or **State Legislation**.

Regulation

Mitigating or anticipating regulatory risks is an important component of any Issues Management strategy. FiscalNote provides comprehensive data on both state and federal regulations, all in one place. While the basic process of accessing regulations is similar, FiscalNote displays regulatory-specific information differently than legislative information.

As with legislators and legislation, searching for regulation starts by selecting **State Regulation** or **Federal Regulation** from the search drop-down. Then, enter your search term, and click Search.

The information contained in different state registers varies significantly from state to state, but FiscalNote can show you several key things for regulations in most states without having to leave the FiscalNote platform. These include :

- Title and ID
- Custom Summary
- Full documents for all stages (proposed, final, etc.)
- Status and Publication Dates
- Any Actions or Notes you've taken and associated with this regulation

Similar information is also available for Federal Regulations, which also include every public comment submitted to the regulation by individuals, organizations, and other government entities. Inside docket pages, you can view the sentiment and position of all comments, as well as the general themes across those comments.

Social Media

Twitter is a great way to get insights into what influential legislators are thinking about your key issues long before any documents go into the public record. To search through legislator tweets, select Twitter from either the State or Federal Legislation categories in the search drop-down and enter your search term. You can also access Facebook and LinkedIn profiles (when available) directly from the Legislator pages.

COLLABORATION AND KNOWLEDGE MANAGEMENT

Whether you're researching regulations and building networks, or monitoring the latest developments on one or more key bills, FiscalNote is designed to make it easy and frictionless to share information and expertise with your colleagues. Here are some of the most important collaboration features built into FiscalNote.

Discussions

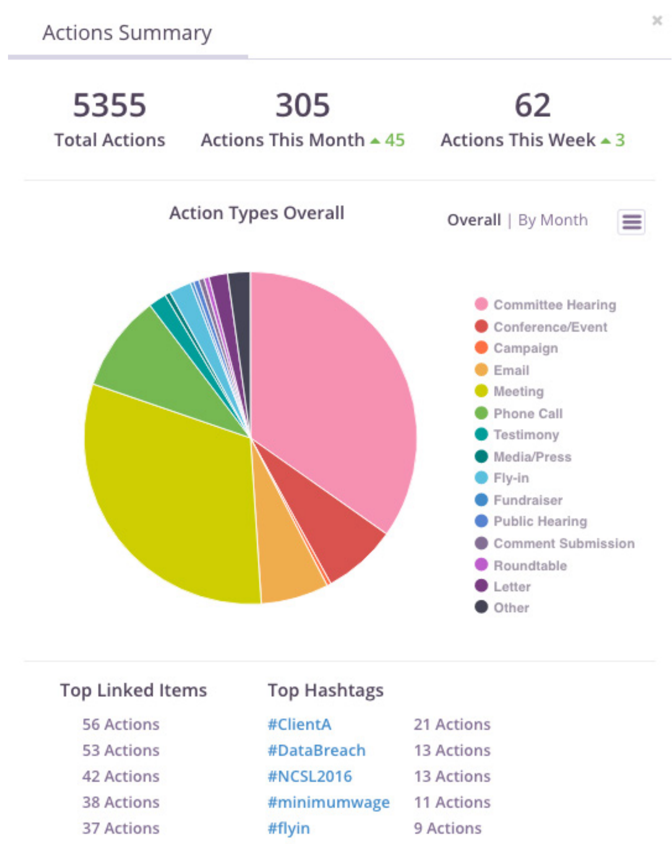
Our Discussions feature is a great way to share information or gather strategic insights from someone else in your organization, and to keep that knowledge associated with the right document or entity page.

You can start (or continue) a Discussion from the Discussions panel, which is available from any screen, and is located in the lower right hand corner. To start or resume a Discussion related to what you're currently looking at, click the Discussions tab to expand it. To make a comment or ask a question to a specific person, type the "@" symbol and start typing that person's name to generate a list of potential matches. That person will then receive a notification of your message inside the application, and via email.

You can search Discussions to quickly find useful internal information, and even filter down to only search Discussions related to certain topics (bills, legislators, etc.). Clicking All Discussions at any time displays the most recent Discussions from across the entire platform.

Actions

One of the biggest differences between the FiscalNote platform and simple tracking and research tools is its ability to help you manage what you actually do in response to key legislative or regulatory developments. Actions are an easy-to-use, system of record for your team's activities around an issue. They act as both a forward-looking roadmap of what you are planning to do, as well as a up-to-date record of what has already been done.



Actions themselves can be anything from emails, to in-person meetings, to conferences, to public comments, and more. You can even tag your colleagues and external stakeholders to an Action in order to track exactly who is doing what. Whether you just took an action, or are planning on doing something in the future related to an issue, bill, legislator, regulation, or committee, simply visit the item's corresponding page, scroll down to the Actions field, and click Add Action.

The Actions tab of a page shows all Actions associated with an item at any time. You can also see every Action inside your organization by going directly to the Actions screen from the main sidebar navigation, or search for a specific one just as you would a bill, legislator, or Note. The See Actions Summary link located in the top right corner of the screen displays a visual summary of all Actions the team has taken.

Notes

Just like Discussions, almost everything in FiscalNote can have custom Notes added to it. **Notes** are free-form, so you can add anything you want. They can either be private, or viewable by other people in your organization. This is especially useful since Notes can also be quickly searched from the main search drop-down (just select Notes). If you make a private note, it will still come up in your own searches, but won't be viewable to anyone else.

Labels

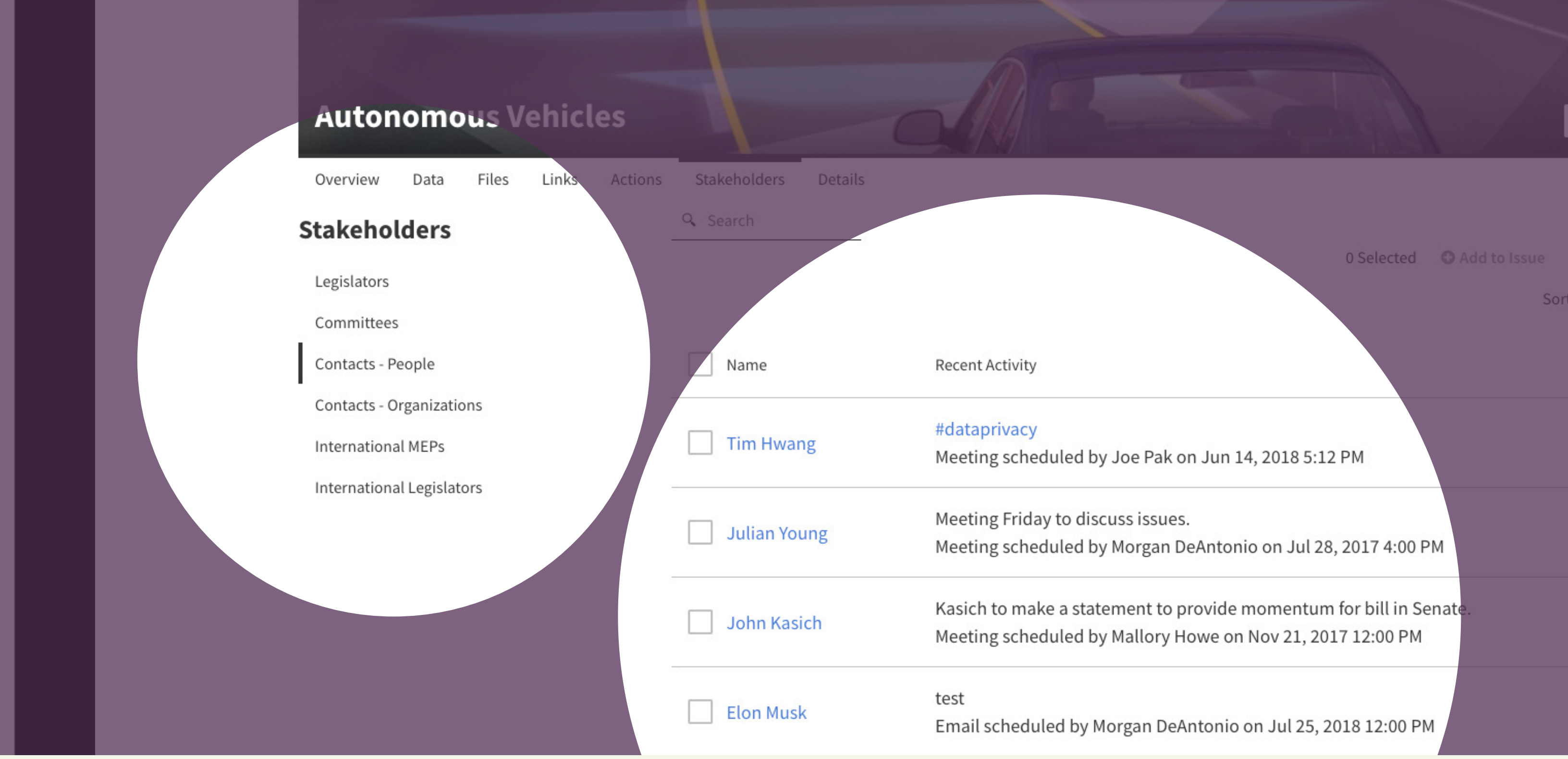
Labels can be used for a variety of different purposes. Users will often deploy labels to:

- Indicate a department or market that is affected by an Issue or stakeholder
- Associate different bill pages with Issues or sub-Issues
- Indicate an event or conference that is related to the entity page
- Or use it to categorize influencers such as "Champion" or "Detractor"

One easy way to create a new label is to go to any entity page — bills, rules, committees, Issues workspaces — and click Edit under the title of the page. This will prompt you to start typing a new or existing label. To access all of your labels, simply click Label from the search drop-down under Your Work and click Search. This page allows you to view and filter all of your labels, as well as all of the data associated with them.

Files & Links

Your Issues can also be used as a repository for relevant external files, such as news articles, PDFs, or other information that is important to your team and internal stakeholders. **Files** are located in each specific Issue page - clicking Files in an Issue will display all previously uploaded documents with the option to filter by Label. Clicking "+Upload File" will bring up a system prompt to select a file, as well as give the options to add a Label and tag a linked item such as a specific bill or legislator.



Managing Contacts

Your workstream isn't just for legislators and staffers — FiscalNote's **Contacts** feature lets you store your own network of Contacts (either individuals or organizations) inside the platform, and even track their relationships to different issues, bills, regulations, committees, or legislators. To create and manage Contacts, simply click the Contacts icon located in the main navigation sidebar. Note that if you create an individual Contact, you can associate them with a larger organizational Contact, so you may want to create your organizational Contacts first. Users can search for both FiscalNote-curated Contacts such as US Legislators and International Elected Officials, and their own custom Contacts. Additionally, you can search for both FiscalNote-curated organizational Contacts, such as Committees, as well as your own custom organizational Contacts.

Managing Stakeholders

First, let's provide some clarity on terms. Contacts that are added to Issues become tagged as **Stakeholders**. Stakeholders are people and organizations that either impact or are impacted by your organization's issues. Stakeholders can be internal decision makers or experts, as well as external trade groups, NGOs, academic institutions, governmental institutions, corporations, agencies, or lawmakers. **Stakeholder Management is how you manage a network of people and organizations with shared interests**.

FiscalNote clients document their engagements with Stakeholders through Actions. Any time a Stakeholder is tagged to an Action, you are creating a record of the people and organizations who share an interest in your particular Issue. This allows you to better build and maintain a network of Stakeholders based on a centralized system of record, and act accordingly based on your organization's goals. The Actions Summary report is a useful way to measure engagement with Stakeholders, as it shows Actions by Type, "Linked Items", Hashtags, and Types over a selected period of months.

FiscalNote's advocacy management technology VoterVoice has a suite of tools for deploying, monitoring, and measuring key interactions between an organization's internal and external stakeholders. **For more information on VoterVoice, please contact your Account Manager.**

REPORTING

Reporting is a great way to bring it all together: to both aggregate trends across multiple issues and geographies, as well demonstrate your value across the organization.

Reports (currently only available for legislative data) allow you to customize a PDF with engaging visualizations such as bills by state, priority and position bar graphs, and actions pie charts, among others. **Exports** generate a simpler, structured documents with bills and rules in list format that can be exported in PDF or spreadsheet (CSV or XLS) formats. Let's walk you through how to generate Reports and Exports in just a few clicks.

Exports

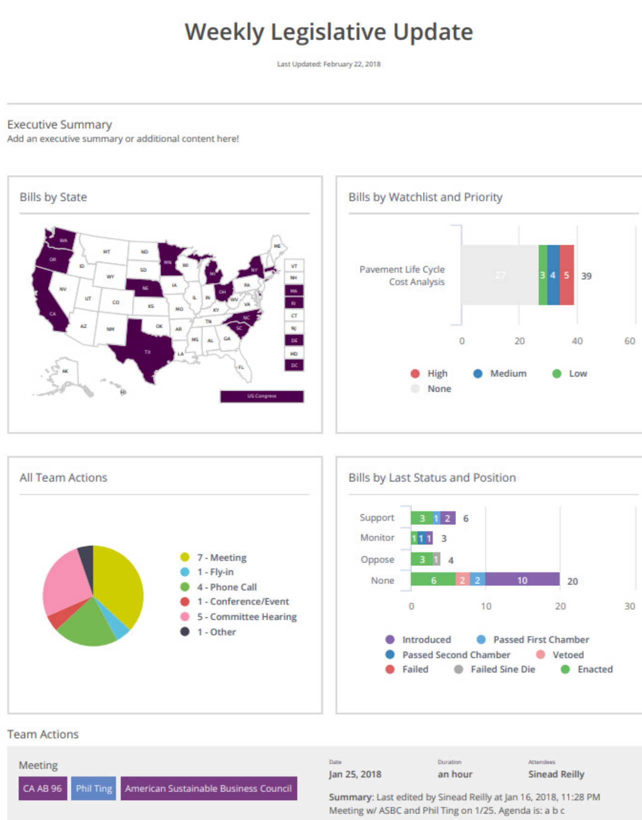
Similarly to Reports, select one or multiple bills by clicking the checkbox at the left-hand side of the bill card. Remember, Exports can incorporate both legislative and regulatory data at the state and federal level. Once you've selected your bills or rules, click Export below the search bar. This will prompt you to title the document, select the export type, and customize the information you decide to share.

Reports

First, select one or multiple bills by clicking on the checkbox at the left-hand side of a bill card. You will be able to see these checkboxes anywhere you access legislation — Search, Discovery Alerts, or Issues.

You can generate reports on Issue-specific bills through the Data tab within a given Issue. Simply select the bills within a specific Issue, and click Create Report in the menu bar. Additionally, you can report on bills across all Issues through the dedicated Reporting section. Once you've selected your bill(s), click Create Report below the search bar.

In both instances, you will then be prompted to select either Weekly Legislative Update, which is a pre-built template, or Custom Report, which is a highly customizable report generator where you can decide what visualizations to include and where to place them in the report. Once you're done, click Save and FiscalNote will generate the report for you to download and share.

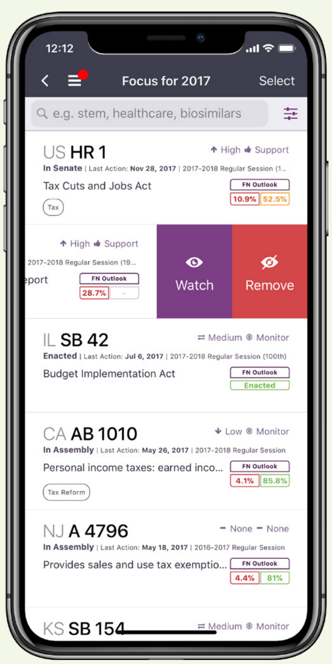


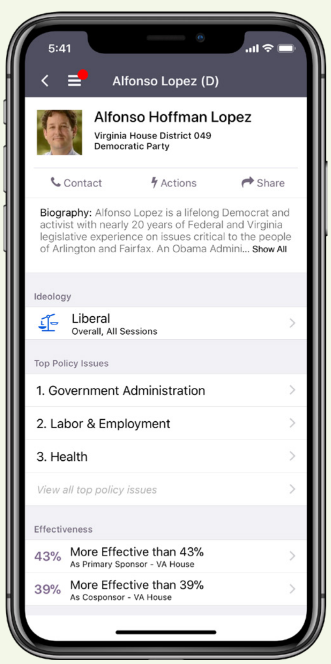
FISCALNOTE MOBILE

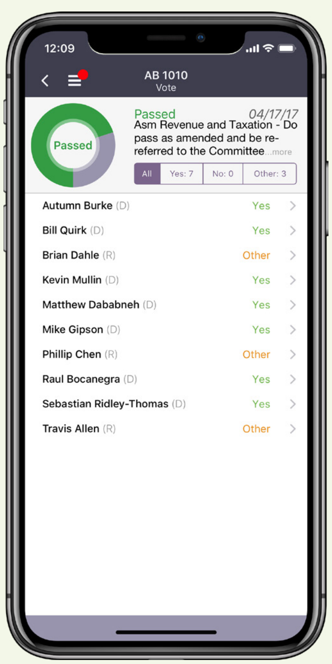
At FiscalNote, we know that government and policy- related work doesn't always wait until you're at your desk — that's why we designed a companion mobile app to make it easier to leverage the information and features mentioned previously. When you use the app, you'll recognize many of the concepts explored here (Discovery Alerts, FN Outlook, Actions, etc.), but your phone is an especially useful way to do a couple of different things. These include:

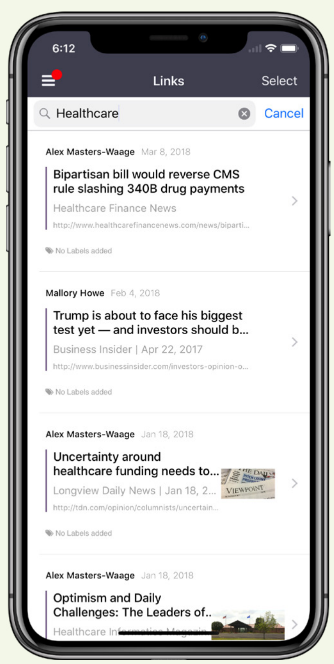
- Scanning a business card, which automatically generates and populates a Contact in FiscalNote
- Logging Actions as they happen with a few taps
- Leaving detailed Notes for yourself and for colleagues by using built-in voice transcription
- Finding contact information and calling legislator offices directly from your phone
- Cramming for meetings by identifying key legislators and committee members on-the-go
- Accessing and adding Contacts as you interact with them
- Reviewing your organization's scheduled and logged Actions to respond to questions immediately (e.g. "What are we doing about issue X?")

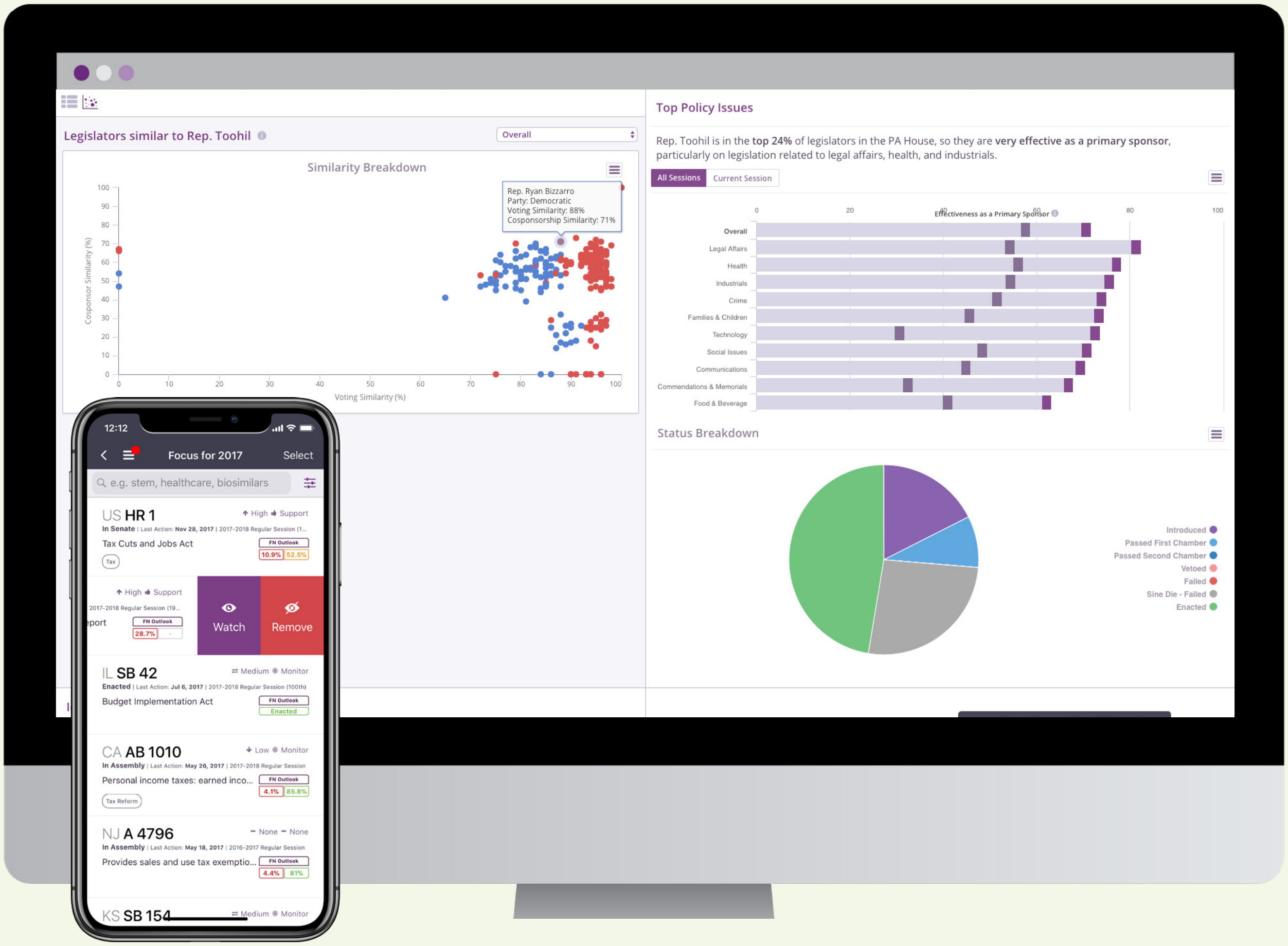
In short, FiscalNote Mobile is more than just the ability to access the platform from a phone — it's actually a better way to do many of the things that make your team successful on a day-to-day basis. So take a few minutes, and give it a try it right now. **Download the iOS Mobile App here**











KEEP EXPLORING FISCALNOTE!

These are some of the most important and immediately useful features in FiscalNote, but there's lots more inside the platform, and we're constantly adding new capabilities and functionality. If you have a question about how something works, or what else you can do with your GRM, don't hesitate to reach out to your Account Manager at any time, or if you're experiencing technical issues, please contact us at **support@fiscalnote.com**.

FN Help Portal

https://support.fiscalnote.com/hc/en-us

FiscalNote

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