



BATS uses standard tools and processes to support bill tracking and analysis. Bill information is automatically imported every hour from the Legislative Service Center (LSC).

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Bill Tracking - Overview

A bill number will remain the same throughout the life of the bill. The bill identification (ID) will automatically get updated to the most current version as it moves through the legislative process.

1. **Select:** Down arrow next to BATS.
2. **Select:** Bills.
 → BATS will display a list of bills based on the current view.



In this example, we change the view from 'all bills in the current legislature' to a sample view to display a list of bills.



Display Bill Information

Bill information includes several sections with additional details.

1. **Select:** Bill.
 → BATS will display [bill information](#).
 → Bill numbers remain the same throughout the life of the bill. The bill identification (ID) will get updated to the most current version as it moves through the legislative process.

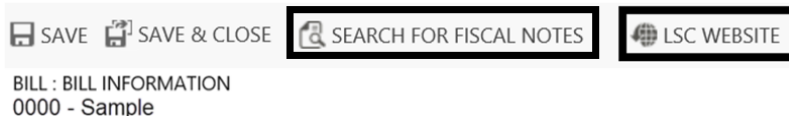


In this example, the bill information includes several sections.

Quick Links - Fiscal Notes Website / Legislative Service Center (LSC) Website

Use the quick links on the bill information page to go to the Fiscal Notes website or the LSC website.

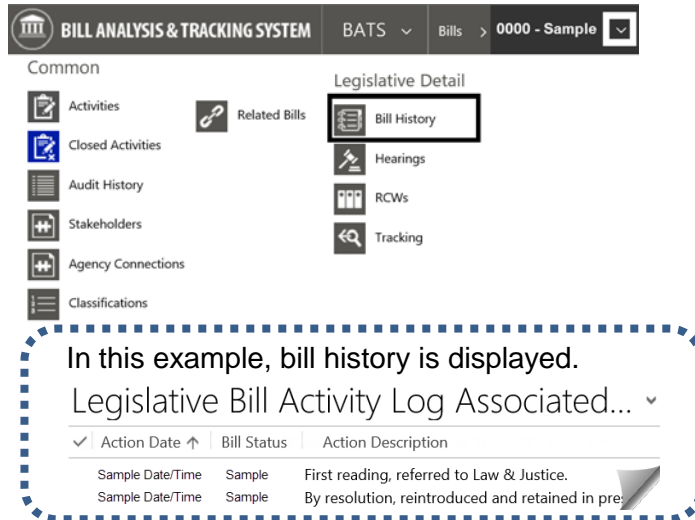
1. **Select:** Search for Fiscal Notes
 -- or --
Select: LSC Website.



Bill History

Use bill history to display additional information about a bill.

- Select:** Down arrow next to the bill.
- Select:** Bill History.
 → BATS will display additional information about the bill.



In this example, bill history is displayed.

Legislative Bill Activity Log Associated...

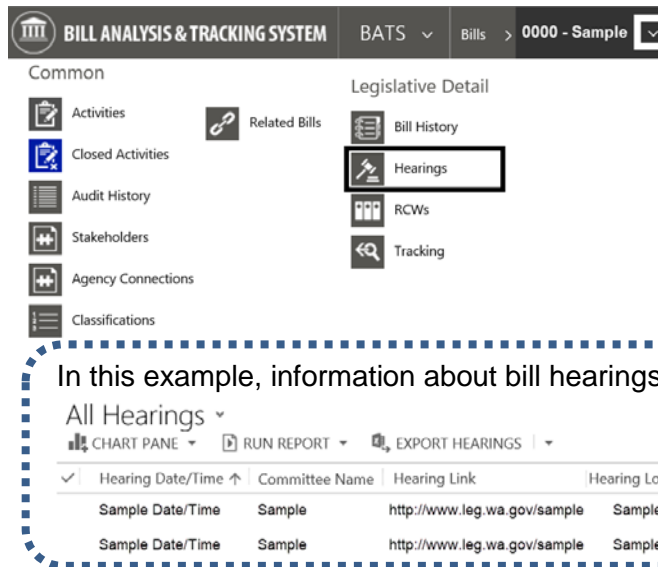
✓ Action Date ↑	Bill Status	Action Description
Sample Date/Time	Sample	First reading, referred to Law & Justice.
Sample Date/Time	Sample	By resolution, reintroduced and retained in pre...

Bill Hearings

Use hearings to display additional information about a bill.

- Select:** Down arrow next to the bill.
- Select:** Hearings.
 → BATS will display information about hearings for the bill.
 → If the bill includes a hearing link, you can select the link and BATS will display the Legislative Service Center (LSC) website with additional information about the hearing.

Hearing Link
<http://www.leg.wa.gov/sample>



In this example, information about bill hearings is displayed.

All Hearings

CHART PANE RUN REPORT EXPORT HEARINGS

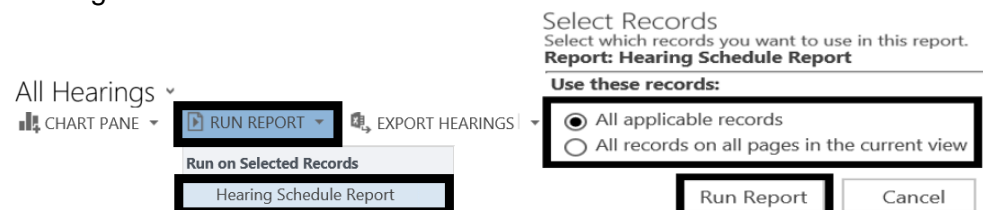
✓ Hearing Date/Time ↑	Committee Name	Hearing Link	Hearing Location	Hearing Number
Sample Date/Time	Sample	http://www.leg.wa.gov/sample	Sample	Sample
Sample Date/Time	Sample	http://www.leg.wa.gov/sample	Sample	Sample

Bill Hearings Report

Use run report to display the hearings report.

- Select:** Run Report.
 → BATS will display available reports and parameters based on the current view.
- Select:** Report.
- Select:** Report parameters.
- Select:** Run Report.
 → BATS will display report results.

In this example, we select the hearing schedule report based on the 'all hearings' view.



All Hearings

CHART PANE RUN REPORT EXPORT HEARINGS

Run on Selected Records

Hearing Schedule Report



Select Records
 Select which records you want to use in this report.
Report: Hearing Schedule Report

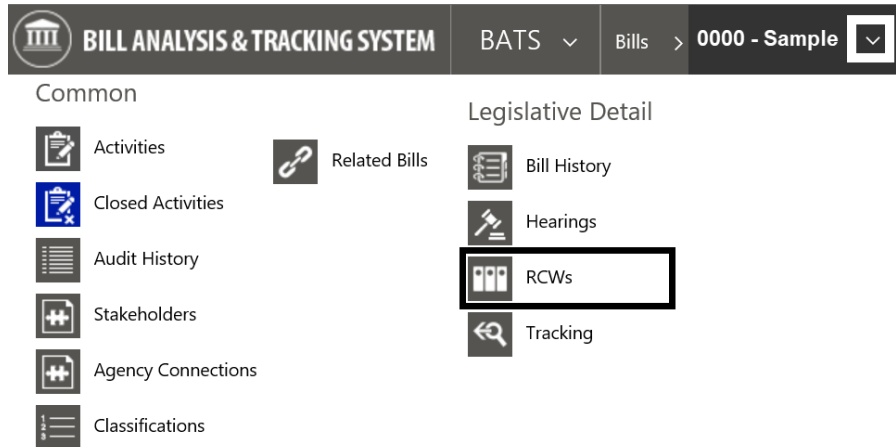
Use these records:

All applicable records
 All records on all pages in the current view

Run Report Cancel

Revised Code of Washington (RCW)
 Use RCWs to display additional information about a bill.


- Select:**  Down arrow next to the bill.
- Select:** RCWs.
 BATS will display a list of RCWs associated with the bill.






The screenshot shows the BATS navigation bar with the following items:

- Common:** Activities, Closed Activities, Audit History, Stakeholders, Agency Connections, Classifications
- Legislative Detail:** Bill History, Hearings, **RCWs** (highlighted with a black box), Tracking

In this example, a list of RCWs related to the bill is displayed.



RCW Associated View 

 Name 	Created On
Sample 00.01	Sample Date/Time
Sample 00.01.01	Sample Date/Time



- Select:** RCW name.
 BATS will display RCW information.


 Name 	Created On
Sample 00.01	Sample Date/Time

In this example, RCW information is displayed.

 WEBLINK  EMAIL A LINK

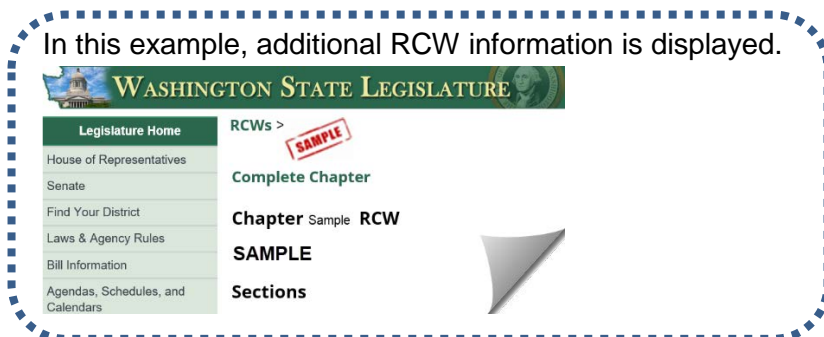
RCW : INFORMATION
 Sample 00.01

-  General
-  Related Bills

- Select:** Weblink.
 BATS will display the Legislative Service Center (LSC) website with additional information about the RCW.

 **WEBLINK**  EMAIL A LINK

In this example, additional RCW information is displayed.



The screenshot shows the Washington State Legislature website with the following content:

- Legislature Home
- House of Representatives
- Senate
- Find Your District
- Laws & Agency Rules
- Bill Information
- Agendas, Schedules, and Calendars
- RCWs > **SAMPLE**
- Complete Chapter
- Chapter Sample **RCW**
- SAMPLE**
- Sections

Track Bills

BATS uses standard tools and processes to track bills. For example, you can track bills and get an email with information about bill updates from data imported from the Legislative Service Center (LSC).

- ✓ Track with hourly updates = one email every hour. If you are tracking 10 bills with hourly updates, you will receive one email every hour with information about the 10 bills (not 10 separate emails).
- ✓ Track with daily updates = one email every day. If you are tracking 10 bills with daily updates, you will receive one email every day with information about the 10 bills (not 10 separate emails).

1. **Select:** Track without updates
-- or --
Select: Track with hourly updates
-- or --
Select: Track with daily updates.

➔ To stop tracking a bill, select stop tracking. BATS will display this option if you are tracking a bill.



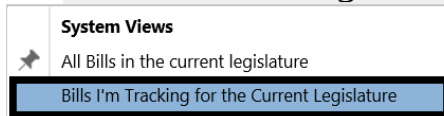


BILL : BILL INFORMATION
0000 - Sample

- ✓ **Track without updates** BATS will not send you an email.
- ✓ **Track with hourly updates** BATS will send you one email every hour.
- ✓ **Track with daily updates** BATS will send you one email every day.

In this example, we use a standard view to display bills we are tracking for the current legislature.

➔ Bills I'm Tracking for the Current Legislature ▾



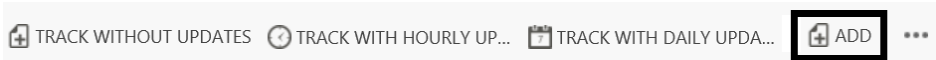
Track Bills - Agency

Agency administrators and agency coordinators can track bills for an agency. For example, you can designate bills for agency tracking so BATS users in your agency can find the bills using a shared view.

1. **Select:** Add.

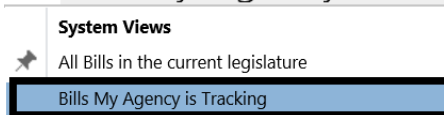
➔ To stop tracking a bill for the agency, select remove. BATS will display this option if you are tracking a bill for the agency.





In this example, we use a standard view to display bills tracked by the agency.

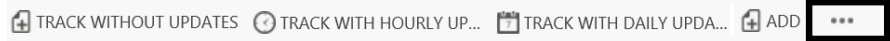
➔ Bills My Agency is Tracking ▾



Track Bills - Agency Division/Team Tracking

Agency administrators and agency coordinators can track bills for an agency division. For example, you can designate bills for division tracking so BATS users in your agency can find the bills using a shared view.

1. **Select:**  Ellipsis.



2. **Select:** Division.



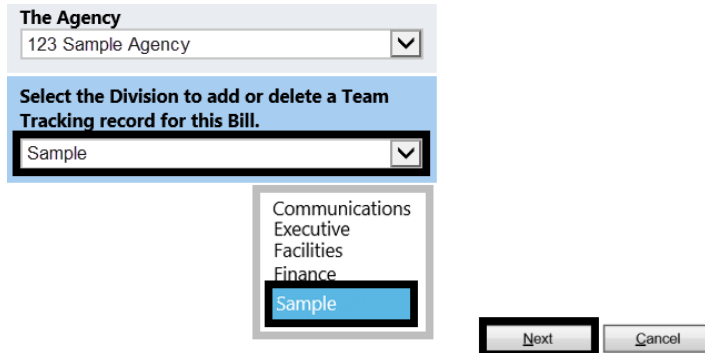
3. **Select:** Division name.

4. **Select:** Next.

→ BATS will display an error message if divisions have not been created for the agency.


→ Agency administrators can create divisions using the BATS Admin menu.

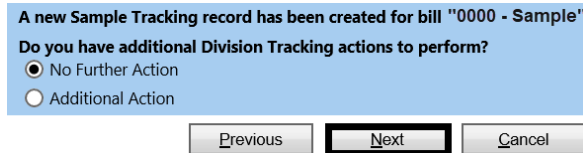
In this example, we select a sample division from the list.



5. **Select:** Next.

6. **Select:** Finish.

→ To stop tracking a bill, select  ellipsis and select division again. BATS will guide you through the process to select the division name and remove the bill from division/team tracking.



In this example, we use a shared view to display bills tracked by the agency sample division.

- ✓ You may need to create a new view if it doesn't already exist. For example, some agencies have their administrator or coordinator create and share views for each division.

→ Bills Division "Sample" is tracking ▾

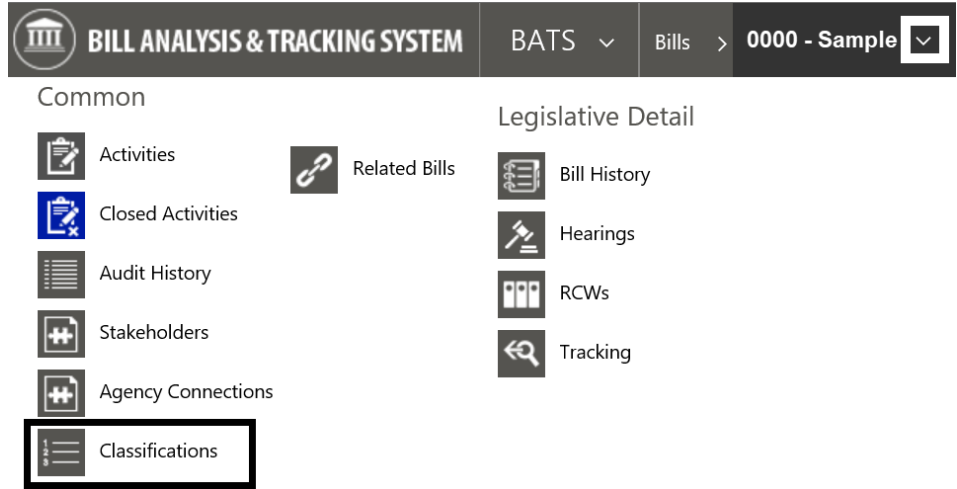
✓	Bill Short Title ↑	Bill ID	Bill Status	Bill Status Date
	0000 - Sample	Sample	Sample	Sample Date

Track Bills - Classification

Agency administrators and agency coordinators can track bills for a classification. For example, you can designate bills for classification tracking so BATS users in your agency can find the bills using a shared view.

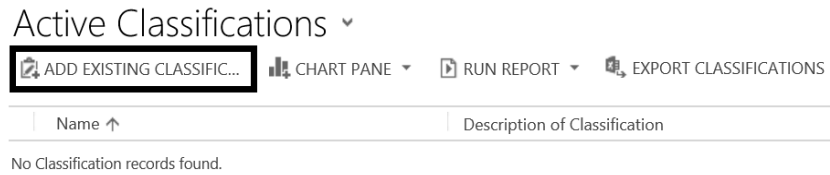
1. **Select:**  Down arrow next to the bill.

2. **Select:** Classifications.
 → BATS will display a list of classifications associated with tracking the bill.




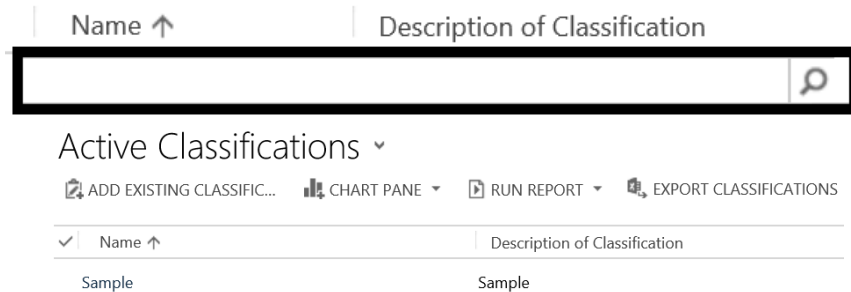
The screenshot shows the BATS navigation menu. The 'BILLS' dropdown is open, showing '0000 - Sample' with a dropdown arrow. Below the navigation bar, there are two columns of menu items: 'Common' and 'Legislative Detail'. The 'Classifications' item in the 'Common' column is highlighted with a black box.

3. **Select:** Add Existing Classifications.



The screenshot shows the 'Active Classifications' page. The 'ADD EXISTING CLASSIFICATION...' button is highlighted with a black box. Below the buttons, there is a table with columns 'Name' and 'Description of Classification'. The text 'No Classification records found.' is displayed below the table.

4. **Select:** Classification.
 → Use  lookup to find the classification.
 → BATS will display a list of classifications associated with tracking the bill.
 → Agency administrators can create classifications using BATS Admin menu.



The screenshot shows the 'Active Classifications' page with a search bar highlighted by a black box. The search bar contains a magnifying glass icon. Below the search bar, the table shows one record with 'Sample' in both the 'Name' and 'Description of Classification' columns.

In this example, we change the view to display bills tracked by classification 'sample'.

✓ You may need to [create a new view](#) if it doesn't already exist.

➔ Bills with Classification Sample ▾

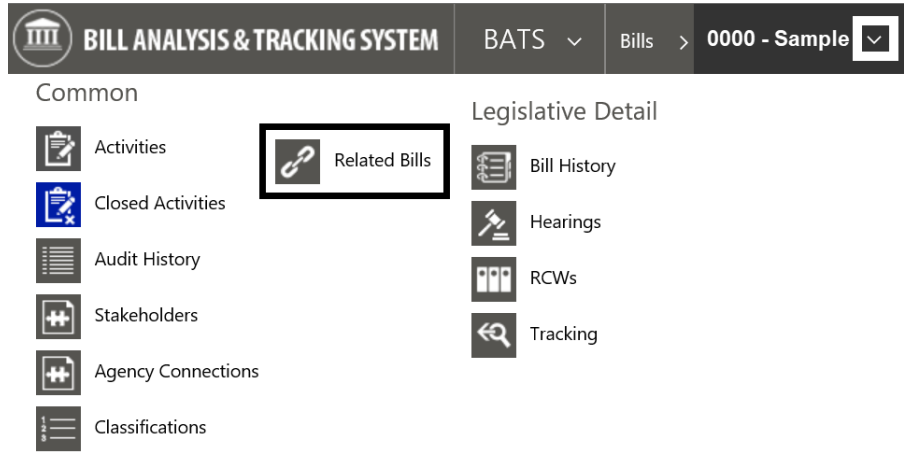
✓	Bill Short Title ▾	Date Introduced
	0000 - Sample	Sample Date
	0123 - Sample 123	Sample Date

Track Bills - Related Bills

Agency administrators and agency coordinators can track related bills. For example, use related bills to connect one bill to another bill for tracking and reference.

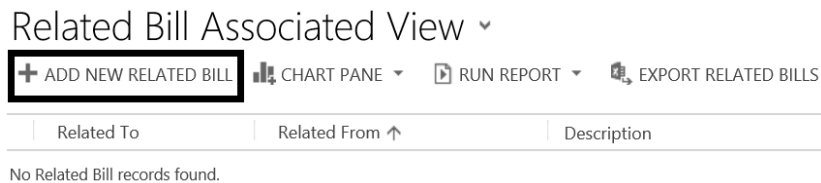
1. **Select:**  Down arrow next to the bill.

2. **Select:** Related Bills.
 → BATS will display a list of related bills.




The screenshot shows the BATS navigation menu. The top bar includes the TAMU logo, the system name 'BILL ANALYSIS & TRACKING SYSTEM', and navigation elements: 'BATS' with a dropdown arrow, 'Bills' with a right-pointing arrow, and '0000 - Sample' with a dropdown arrow. Below this, there are two columns of menu items. The left column, titled 'Common', includes: Activities, Closed Activities, Audit History, Stakeholders, Agency Connections, and Classifications. The right column, titled 'Legislative Detail', includes: Bill History, Hearings, RCWs, and Tracking. The 'Related Bills' item in the 'Common' column is highlighted with a black box.

3. **Select:** Add New Related Bill.
 → BATS will display bill information.



The screenshot shows the 'Related Bill Associated View' interface. At the top, there is a dropdown menu for the view type. Below it, there are four buttons: '+ ADD NEW RELATED BILL' (highlighted with a black box), 'CHART PANE', 'RUN REPORT', and 'EXPORT RELATED BILLS'. Below the buttons is a table with three columns: 'Related To', 'Related From ↑', and 'Description'. The table is currently empty, with the text 'No Related Bill records found.' displayed below it.

4. **Select:** Bill. This will be the related bill.
 → Use  lookup to find the bill.



The screenshot shows the 'Relate to' form. It has a label 'Relate to' and a sub-label 'Related To'. Below the sub-label is a text input field with a search icon on the right, which is highlighted with a black box.

5. **Input:** Description.
 → Provide brief description for why you are relating the bill.

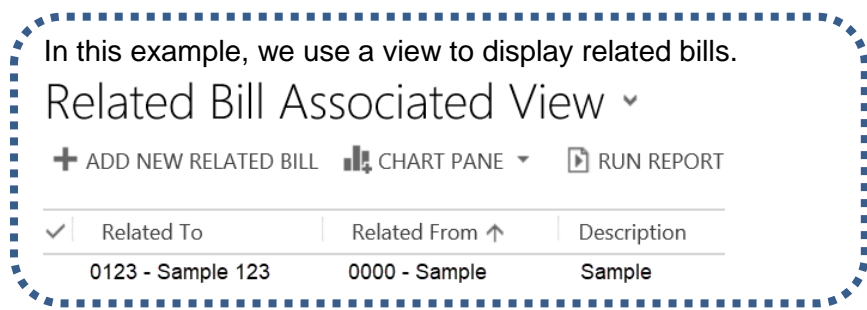


The screenshot shows the 'Related To' and 'Description' fields. The 'Related To' field contains the text '0123 - Sample 123'. The 'Description' field is an empty text input box, highlighted with a black box.

6. **Select:** Save.



The screenshot shows a 'Save' button, which is highlighted with a black box.



In this example, we use a view to display related bills.

Related Bill Associated View

+ ADD NEW RELATED BILL | CHART PANE | RUN REPORT

✓	Related To	Related From ↑	Description
	0123 - Sample 123	0000 - Sample	Sample

Update Description or Remove Connection for Related Bill

Agency administrators and agency coordinators can update the description and/or remove the connection to a related bill.

- 1. Double-Click:** Row. This is the row for the related bill.
 → BATS will display related bill information.

Related Bill Associated View ▾

+ ADD NEW RELATED BILL
 📊 CHART PANE ▾
 📄 RUN REPORT

Related To	Related From ↑	Description
0123 - Sample 123	0000 - Sample	Sample

→ If you accidentally select the link to the bill, BATS will display details about the bill instead of related bill information.

Related To	Related From ↑
0123 - Sample 123	0000 - Sample

- 2. Input:** Description (brief description to explain why you are relating the bill)
 -- or --
Select: Delete (this will remove the connection to the related bill).

Related To 0123 - Sample 123

Description -- or --

→ In this example, we select delete to confirm that we want to remove the connection to the related bill.

Confirm Deletion


Do you want to delete this Related Bill? You can't undo this action.

- 3. Select:** Save.

Track Bills - Who is Tracking This Bill

Agency administrators and agency coordinators can display information about who is tracking a bill.

- 1. Select:** Down arrow next to the bill.
- 2. Select:** Tracking.
 → BATS will display a list of users and divisions/teams in the agency who are currently tracking the bill.


 BILL ANALYSIS & TRACKING SYSTEM
 BATS ▾
 Bills > 0000 - Sample ▾

Common

- Activities
- Closed Activities
- Audit History
- Stakeholders
- Agency Connections
- Classifications

Related Bills

Legislative Detail

- Bill History
- Hearings
- RCWs
- Tracking

In this example, a user in the agency is tracking the bill with hourly updates.

Active Tracking ▾

Tracked Bill	Owner	Division	Notification Level ↑
0000 - Sample	Sample Name		Hourly

Bill Information – Overview

Bill information includes several sections with additional details.

- ✓ A bill number will remain the same throughout the life of the bill. The bill identification (ID) will get updated to the most current version as it moves through the legislative process. Use the [bill history report](#) to display additional information about the versions.
- ✓ The analysis section includes several additional sections to collect information for [agency bill analysis](#).

In this example, the bill information includes several sections.

BILL : BILL INFORMATION
0000 - Sample

Bill #	SAMPLE	Date Introduced	Sample Date	Primary Sponsor	Sample Name
Bill ID		Original Chamber	Sample		

- ▶ General
- ▶ Agency Position
- ▶ Agency Contacts
- ▶ Chamber Votes
- ▶ Sponsors
- ▶ Analysis
- ▶ Notes

} Select a section to display details.

Bill Information - General

Use the general section to display information about the bill. This information is imported every hour from the Legislative Service Center (LSC).

- ✓ You can display information in the general section but you cannot change it.

In this example, the general section includes additional information imported from LSC.

▶ **General**

Session	🔒	SAMPLE		
Short Title *	🔒			
Official Title	🔒			

Companion Bill	🔒	--	Related Draft #	🔒	Sample
Passed By Chamber Of Origin Flag	🔒	--	Passed By Opposite Chamber Flag	🔒	Passed by Legislature Flag
Tracking Notes	🔒	*****			Related Agency Request

Bill Information - Agency Position







Use the agency position section to update information about the agency position and priority for a bill.

✓ This section is usually updated after your agency has completed the [agency bill analysis](#).

1. Select: Agency Position. → BATS will display information for agency position and priority.	<input type="button" value="▶ Agency Position"/>
2. Select:  plus icon.	<input type="button" value="⊕"/>
3. Input: Agency Short Title.	Agency Short Title <input type="text"/>
4. Select: Agency Position.	Agency Position <input type="text" value="--"/>
5. Select: Agency Priority.	Agency Priority <input type="text" value="--"/>
6. Select: Save.	<input type="button" value="Save"/>

Bill Information - Agency Contacts

Use the agency contacts section to provide information about stakeholders and other contacts.

1. Select: Agency Contacts. → BATS will display information for agency contacts.	<input type="button" value="▶ Agency Contacts"/>										
2. Select:  plus icon.	<input type="button" value="⊕"/>										
3. Input: Name and organization.	Name and Organization (if applicable) * <input type="text"/> → This is the name and organization of the contact. For example, provide first and last name for a stakeholder. Include their organization name if applicable.										
4. Select: Role. This is the role for the agency contact.	Role * <input type="text"/>										
5. Input: Description. → Provide brief description to explain why you are connecting this agency contact to the bill.	Description <input type="text"/>										
6. Select: Save. → Use the  trash can icon to delete an agency contact. → Select the agency contact name to update their information.	<input type="button" value="Save"/> <div style="border: 2px dashed blue; border-radius: 15px; padding: 10px;"> In this example, we hover the cursor over the agency contact information to select the  trash can icon. </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="text-align: left;">Name ↑</th> <th style="text-align: left;">Role</th> <th style="text-align: left;">Position</th> <th style="text-align: left;">Description</th> <th></th> </tr> </thead> <tbody> <tr> <td>Sample</td> <td>Sample</td> <td>Sample</td> <td>Sample</td> <td style="text-align: center;"></td> </tr> </tbody> </table>	Name ↑	Role	Position	Description		Sample	Sample	Sample	Sample	
Name ↑	Role	Position	Description								
Sample	Sample	Sample	Sample								

Bill Information - Chamber Votes

Use the chamber votes section to display information about house and senate votes for the bill. This information is imported every hour from the Legislative Service Center (LSC).

- ✓ You can display information in the chamber votes section but you cannot change it.

In this example, there are no roll call vote records for the bill.

Chamber Votes

House Votes

Chamber	Date ↓	Vote Id ↓	Yeas	Nays	Absent	Excused
No Roll Call Vote records found.						

Senate Votes

Chamber	Date ↓	Vote Id ↓	Yeas	Nays	Absent	Excused
No Roll Call Vote records found.						

Bill Information - Sponsors

Use the sponsors section to display information about sponsors for the bill. This information is imported every hour from the Legislative Service Center (LSC).

- ✓ You can display information in the sponsors section but you cannot change it.

In this example, there are primary and secondary sponsors for the bill. You can select a sponsor name to display their contact information.

Sponsors

Sponsor Order ↑	Role (To)	Connected To
0	Primary Bill Sponsor	Sample Name
1	Secondary Bill Sponsor	Sample
2	Secondary Bill Sponsor	Sample

Bill Information - Analysis

Use the analysis section to create and maintain detailed information, assignments, and notes.

1. **Select:** Analysis.

➔ BATS will display several sections to collect information about [agency bill analysis](#).

BILL : BILL INFORMATION
0000 - Sample

Bill #	Date Introduced	Sample Date	Primary Sponsor	Sample Name
Bill ID SAMPLE	Original Chamber	Sample		

- ▶ General
- ▶ Agency Position
- ▶ Agency Contacts
- ▶ Chamber Votes
- ▶ Sponsors
- ▶ Analysis**
- ▶ Notes

Bill Information - Notes

Use the notes section to provide additional information for the bill.

1. **Select:** Notes.



2. **Input:** Notes.

-- and/or --

Select: Attach.

→ BATS uses standard options to browse, select, and upload attachments.

NOTES

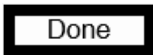
Sample

 **Attach**
Done


3. **Select:** Done.

→ BATS will display information about notes and/or attachments.

→ Use the  icon to delete your note and/or attachment.





In this example, the notes section includes an excel spreadsheet with the name of the person who uploaded the attachment and the date/time it was uploaded.

✓ Use the  icon to delete your note or attachment.

NOTES

Enter a note

 Sample Attachment.xlsx


Sample Name - Sample Date/Time

Agency Bill Analysis - Overview

Agency administrators and agency coordinators can use the analysis section to create and maintain detailed information, assignments, and notes.

- ✓ You can create multiple analysis records. For example, some agencies create multiple analysis records to develop different 'what if' scenarios.

1. **Select:** Analysis.



2. **Select:** + plus icon.

→ BATS will prompt you for general information about the new analysis.



In this example, the analysis includes sections to collect general information, assignments, analysis details, review task details, supplemental information, and notes.

ANALYSIS : AGENCY ANALYSIS

New Analysis

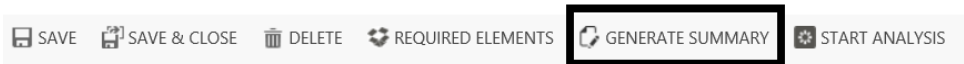
- ▶ General
- ▶ Assignments
- ▶ Analysis Details
- ▶ Review Task Details
- ▶ Supplemental Information
- ▶ Notes

Agency Bill Analysis - Generate Summary

Use generate summary to review analysis information.

1. **Select:** Generate Summary.

→ BATS will display a summary of the analysis.



Agency Request Analysis Summary - For Internal Use Only

ANALYSIS NAME:			SAMPLE	DRAFT
AGENCY REQUEST NUMBER:	Z-DRAFT NUMBER:	PRIMARY CONTACT:		
SHORT TITLE:				
SHORT DESCRIPTION:				
LEAD ANALYSIS:	PROGRAM:	DIVISION C		
CREATED:	PREPARED BY:	DATE DUE:		

Brief summary of what this bill does and its purpose:

Agency Analysis - General Information

Use the general section to provide basic information about the analysis.

1. Input: Analysis Name.

➔ Use up to 100 characters to input a name for your agency analysis.

➔ Some agencies include the version of the bill in their analysis name.(a bill number doesn't change but the version may change during the life of a bill).

Analysis Name *

2. Select: Program/Division.

Program/Division

3. Select: Division coordinator.

Division Coordinator

4. Select: Lead Analysis.

➔ Yes/No to indicate if this is the lead analysis. For example, some agencies create a lead analysis as their primary analysis and create additional analysis records for 'what if' scenarios.

Lead Analysis?

5. Select: Preparer.

➔ This is the person responsible for providing the analysis.

6. Select: Preparer Due Date.

In this example, we leave the preparer name and due date blank.

✓ If you are not the agency coordinator, you might want to skip these steps and let the coordinator assign the preparer and due date as part of their process. For example, some agencies designate a person to act as a coordinator for their agency analysis processes.

Preparer

Preparer Due Date


7. Select: Save.

Agency Analysis - Assignments

Agency administrators and agency coordinators can use the assignments section to prepare and display a list of reviewers for the agency analysis. For example, some agency coordinators will create a new analysis record and make assignments for other BATS users in their agency to provide reviews and edit the analysis.

- ✓ BATS also provides an option to link a default coordinator and up to seven default reviewers using programs/divisions. For example, agency administrators can link a division coordinator and reviewers to a program. When you associate that program to your agency analysis, BATS will auto-fill assignments/tasks to prepare and review the analysis. Reference the job aid for divisions/programs/classifications for more information about setting up the defaults.

1. **Select:** Reviewer.

→ Use  lookup to find reviewers for the agency analysis.

Reviewer




2. **Select:** Due Date.

→ BATS will automatically update the status for assignments. For example, the reviewer status will remain 'not assigned' until the analysis is prepared and ready for review.

Due Date

In this example, the status is not assigned because the agency analysis is not ready for review yet.

Assignments

Reviewer	Status	Due Date
 Sample Name	 Not assigned	Sample Date
--	 Not assigned	--

3. **Select:** Save.

Save

Agency Analysis - Details

Agency administrators and agency coordinators can use the details section to provide analysis details for the bill. BATS will display information based on current instructions for the legislative session (this job aid provides sample analysis details).

- ✓ The analysis details section provides a quick way to scroll through all of the details and apply formatting for narrative sections. You can also input analysis details by using '[start analysis](#)' (top banner area). BATS will guide you through the analysis details step-by-step with additional information. When you are finished, you can use the analysis details section to edit the information and apply formatting.
- ✓ Use plain talk to provide clear and concise answers for the narrative sections to help ensure decision makers can easily understand your agency analysis.

1. **Input:** Brief summary.

➔ Provide a brief summary/purpose.

Brief Summary ⁺



2. **Input:** Impact Difference.

➔ If this is a substitute, amended, or engrossed bill, provide a brief description of how the impact is different from previous versions.

Impact Difference ⁺



3. **Select:** Policy Effect.

4. **Input:** Description of Policy Effect.

➔ Provide a brief description of the policy effect.

Major
Minor
None
Uncertain

Description of Policy Effect ⁺



5. **Select:** Fiscal Impact.

6. **Select:** Type of Impact.

7. **Select:** Annual Impact.

8. **Input:** Fiscal Impact Comments.

➔ Provide a brief description of the fiscal impacts.

Yes
No
Uncertain

Positive
Negative
Uncertain
None

None
Less than \$50,000
\$50,000 or more
Uncertain

Fiscal Impact Comments ⁺



9. **Select:** Appropriation Needed.

10. **Select:** Budget Impacted.

Yes
No
Uncertain

N/A
Operating Budget
Capital Budget
Transportation Budget



11. Input: Others Impacted.

➔ Provide a brief description of others impacted. For example, other divisions of your agency, other state agencies, or local government impacted by this bill.

Others Impacted ⁺

Rich text editor toolbar with icons for undo, redo, bold, italic, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, styles, and format. Below the toolbar is a large empty text box for input.

12. Select: Continue to Track.

➔ If there is no policy effect or fiscal impact, do you want to continue to track the bill?

No
Yes
Defer to Lead

13. Select: Effect on Stakeholder.

14. Input: Stakeholder Effect Comments.

➔ Provide a brief description of the effect on stakeholders.

Major
Minor
None
Uncertain

Stakeholder Effect Comments ⁺

Rich text editor toolbar with icons for undo, redo, bold, italic, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, styles, and format. Below the toolbar is a large empty text box for input.

15. Select: Recommended Position.

➔ This is the recommended position for the agency.

16. Input: Position Comments.

➔ Provide a brief description of the agency position.

Support
Support with Concerns
Neutral
Concerns
Oppose
No Position
Other

Position Comments ⁺

Rich text editor toolbar with icons for undo, redo, bold, italic, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, styles, and format. Below the toolbar is a large empty text box for input.

17. Select: Testify (Yes/No).

➔ Does your agency plan to testify at hearings in support of the bill?

18. Input: Issues to Testify On.

➔ Provide a brief description of the issues to testify on.

No or Yes

Issues to Testify On ⁺

Rich text editor toolbar with icons for undo, redo, bold, italic, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, styles, and format. Below the toolbar is a large empty text box for input.

19. Select: Effect On Rules.

20. Input: Rules Comments.

➔ Provide a brief description of the effect on rules. For example, would this bill require a new rule or revise an existing rule?

Yes
No
Uncertain

Comment on rules ⁺

Rich text editor toolbar with icons for undo, redo, bold, italic, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, styles, and format. Below the toolbar is a large empty text box for input.

21. **Select:** Should AG Review (Yes/No).
 → Should attorney general review the bill?

 No or Yes

22. **Input:** AG Information.
 → Provide a brief description or other information for the attorney general review.

Ag information ⁺

23. **Input:** General Comments.
 → Provide additional comments.

General comments ⁺

24. **Select:** Save.

Agency Analysis - Review Task Details

Use the review task details section to display status and information about tasks related to the analysis.

✓ You can select a task to display additional details and you can complete the task if it is assigned to you.

1. **Select:** Review Task Details.
 → BATS will display a list of tasks related to the analysis.

→ In this example, the task list is displayed for the agency analysis.

Reviewer Name	Reviewer Title/Purpose ↑	Due Date	Activity Status	Actual End
Sample Name	Reviewer	Sample Date/Time	Completed	Sample Date/Time
Sample Name	Reviewer	Sample Date/Time	Open	

Status In Review

Agency Analysis - Supplemental Information

Use the supplemental information section to provide additional details for the agency analysis.

✓ Use plain talk to provide clear and concise answers for the narrative sections to help ensure decision makers can easily understand your agency analysis.

1. **Select:** Supplemental Information.

2. **Input:** Supplemental information.
 → BATS provides sections for Supplemental 1, Supplemental 2, and Supplemental 3.

Supplemental 1

Supplemental 2

Supplemental 3

Agency Analysis - Notes

Use the notes section to provide additional information for the agency analysis.

1. **Select:** Notes.



2. **Input:** Notes.

-- and/or --

Select: Attach.

→ BATS uses standard options to browse, select, and upload attachments.


NOTES

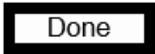
Sample

 **Attach**
Done


3. **Select:** Done.

→ BATS will display information about notes and/or attachments.

→ Use the  icon to delete your note and/or attachment.





In this example, the notes section includes an excel spreadsheet with the name of the person who uploaded the attachment and the date/time it was uploaded.

✓ Use the  icon to delete your note or attachment.

NOTES

Enter a note

 Sample Attachment.xlsx 


Sample Name - Sample Date/Time

Agency Bill Analysis - Start Analysis

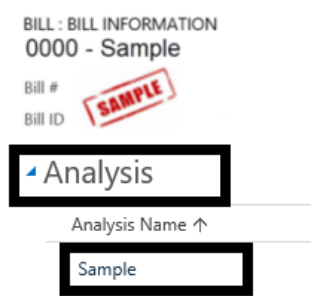
Use 'start analysis' to input analysis for the agency analysis.

- ✓ BATS will guide you through the analysis details step-by-step with additional information. Use plain talk to provide clear and concise answers for the narrative sections to help ensure decision makers can easily understand your agency analysis.

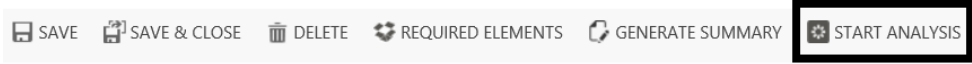
1. **Select:** Bill.



2. **Select:** Analysis.
3. **Select:** Analysis Name.



4. **Select:** Start Analysis.
→ BATS will guide you through the analysis details step-by-step with additional information.



→ If the bill includes more than one agency analysis, BATS will display a prompt so you can copy another analysis from the same bill. For example, you can copy information from one analysis to another analysis and then quickly edit the information.

Analysis Details

Would you like to Copy a previous Analysis?

No

Yes

5. **Input:** Analysis information.
6. **Select:** Next.
→ Continue the steps to input analysis details and select next for the next section of details.
→ When you get to the end of the steps, BATS will display an 'end of dialog' message.
7. **Select:** Finish.



8. **Select:** Save.





Agency Bill Analysis - Ready For Review

Agency administrators and agency coordinators can use the ready for review option to indicate the analysis is available for the review cycle.

- ✓ Remember to select 'mark complete' after you select 'ready for review'. When you finish your action item and mark the item complete, BATS will update the status and assignments.

1. **Select:** Ready for Review.



2. **Select:** Mark Complete.
 → BATS will update the status and assignments.




Agency Bill Analysis - Review Analysis

BATS will automatically send you an email when you are assigned to review agency analysis.

- ✓ Remember to select 'save & close' and 'mark complete'. For example, when you finish your action item and mark the item complete, BATS will update the status and assignments.
- ✓ If there are multiple reviewers for the analysis, each reviewer will select 'mark item complete' after they review the analysis and the agency administrator will select 'complete' when they are done with their [final review](#).

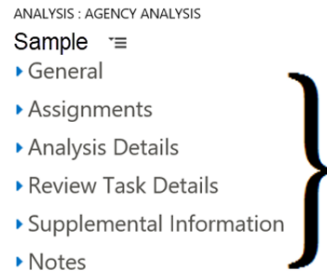
1. **Select:** Link to the analysis that needs to be reviewed.
 → BATS will display the agency analysis sections.



2. **Select:** Generate Summary.
 → BATS will open a browser tab to display a summary of the analysis so you can review the information.




3. **Edit:** Agency analysis information if needed.
 → Scroll down or select agency analysis sections to edit information if needed.




} Select agency analysis sections to edit information if needed.

4. **Select:** Save & Close.
 → BATS will display the assigned activity for the review.



5. **Select:** Mark Complete.
 → BATS will update the status and assignments.



REVIEW ENTRY : ANALYSIS REVIEW ENTRY

Agency Bill Analysis - Final Review and Complete Analysis

Agency administrators can review, edit, and complete the analysis process.

- ✓ Remember to select 'save & close' and 'complete'. For example, when you finish your final review and select complete, BATS will update the status and assignments.
- ✓ BATS will automatically update the status for the agency bill analysis as it moves through the prepare and [review process](#). For example, BATS will automatically change the status from 'assigned' to 'in review' after the preparer selects 'ready for review'. If there are multiple reviewers for the analysis, each reviewer will select 'mark item complete' after they review the analysis and the agency administrator will select 'complete' when they are done with their final review.

1. **Select:** Complete.

➔ BATS will update the status and assignments.

In this example, we select complete.



Activate Analysis (Undo Complete)

Agency administrators can use 'activate' to reset (unlock) analysis steps on a completed analysis. For example, you may need to use this if you selected 'complete' for the analysis and need to make additional updates before you submit the agency request to OFM.

- ✓ When you select activate, BATS will update the reviewer status to 'not assigned' and unlock the analysis so you can make additional updates and select 'in review' again to restart the review process.

