Agency Bill Analyses – Agency Process Overview

Agencies create analyses for a bill to provide clear, concise answers and help ensure decision makers easily understand the agency's position. Multiple analysis can be created by an agency to describe multiple "what-if" scenarios for a bill before it is checked in as enrolled.

✓ The BEARS application allows agency users to create, edit, review, and delete an Agency Bill Analysis based on roles and permissions assigned

✓ The workflow for creating an Agency Bill Analysis in BEARS is based on the current workflow and expectations

✓ The following processes are covered in this job aid:

  o Creating a new Agency Bill Analysis (Agency Administrator)

  o Providing relevant information for the Agency Bill Analysis by an Agency Analyst or the Agency Administrator

  o Completing the Agency Bill Analysis

To create a user account for BEARS, complete the BEARS Security Request form for the application. Keep in mind only one role can be assigned per user, information on roles and permissions can be found in the Roles and Permissions Guide.

✓ BEARS can be accessed using Chrome, Firefox, or Microsoft Edge. Access BEARS application.

✓ For training members of your agency on BEARS, please visit the BEARS training environment.

✓ For more information about BEARS and training materials, please visit the BEARS web page.

✓ For additional information about BEARS, contact the OFM Help Desk.

HereToHelp@ofm.wa.gov **360.407.9100**

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Agency Bill Analyses (List) Screen – Agency User

The Agency Bill Analyses Screen is available for any Agency User to view information. A System View is a pre-defined list of bills for the selected session in BEARS with a set of filters applied to certain columns displayed.

Note: The buttons available in the header will be available based on the role/permissions of the user.

- ☐ Preset System Views will be set up and available for all users
- ☐ Saved Views are user specific and multiple views can be created and saved
- ☐ Filters and sorting can be used to tailor the list of bills to view and/or store as a Saved View
- ☐ Any bill that already has one or more analyses associated will display a subset of records with its analysis information included
- ☐ Page Header:
    - o Until a bill is selected the page header only contains information about the current legislative session
    - o After a bill is selected the Bill Short Title as a link to the Bill in LSC is included
    - o After an Agency Bill Analysis is created the Analysis Name and Analysis Status are included
- ☐ Sidebar or Left Navigation – provides navigational links to the workflow components to complete an Agency Bill Analysis
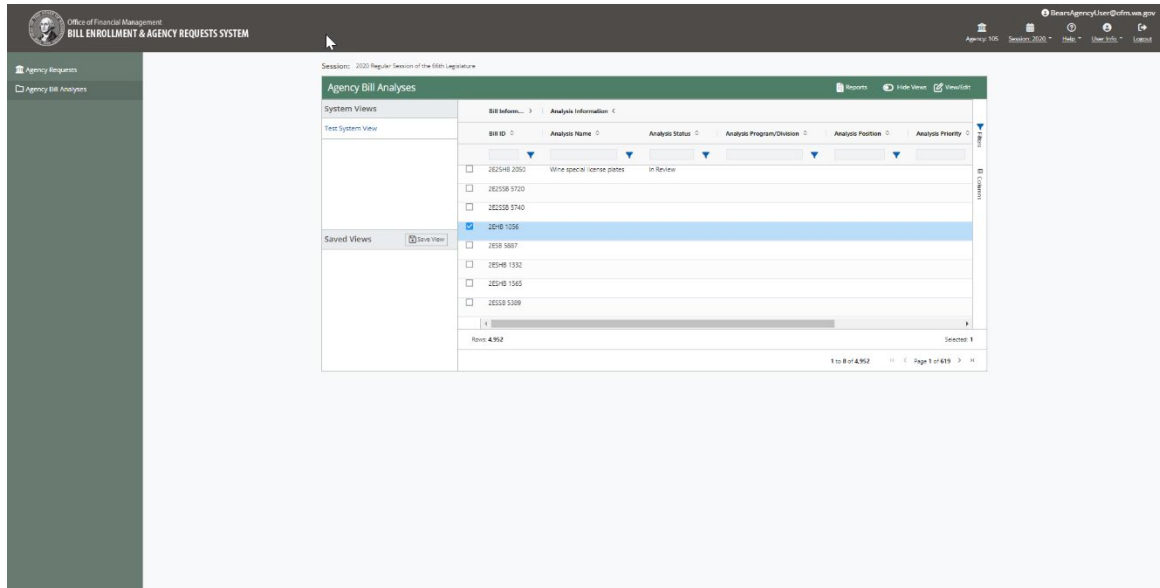
Agency Bill Analyses (List) Screen & Create Agency Bill Analysis – Agency Administrator

This section covers the **Agency Bill Analyses (List) Screen** as used by the Agency Admistrator including the ability to create an Agency Bill Analysis:

1. Navigate:
As an Agency Administrator log into BEARS and navigate to the **Agency Bill Analyses (List) Screen** to view the list of bills

➔ View Bill and Bill Analysis information by toggling between the following selection arrows:

- **Bill Information** selection – shows a line item per Bill ID and

- **Analysis Information** selection – shows a line item for each analysis created, a bill can have multiple analyses

➔ **Filter Tools** – the filter can be set for each column by the use of the filters tool on the right hand side

➔ **Column Tools** – the bill /analysis filter options customized by selecting or deselecting the checkbox by each column header

➔ **Other Information Displayed**:

- **Rows:** provides the number of records returned

- **Range and Page Number:** The bottom row displays the numeric range of 8 records returned and the page number of the range

2. Show Views/Hide Views:
Any Agency Administrator can select the **Show Views** button and **Hide Views** button (alt+shift+k) as a toggle to show or hide the System Views and Saved Views Selection Columns from the grid

3. Create Analysis:

An Agency Administrator can create a new Analysis by selecting the box next to any bill on the Agency Bill Analyses Screen and then selecting the **Create Analysis** button (alt+shift+n)

➔ Once the **Create Analysis** button (alt+shift+n) is selected, the Agency Administrator navigates to the **Analysis Information Screen** to enter the **Analysis Name** and **Program**

➔ **Save Unsuccessful:** If the information is not entered completely, when the **Save** button (alt+shift+s) is selected the following message will be provided:

"Bill Analysis failed to save."

➔ Select the **Back** button before saving or navigate away and receive the Unsaved Changes popup

- Select **Discard Changes** to navigate to another screen or
- Select **Continue Editing** to continue editing

Save Successful: If the information is entered completely, when the **Save** button (alt+shift+s) is selected the following message will be provided:

"Bill Analysis successfully save."

4.

5. View/Edit:

Once a Bill Analysis is created it can be selected from the list of bills on the **Agency Bill Analysis** Screen

➔ Then select the **View/Edit** button (alt+shift+v) to navigate to the **Bill Information** Screen to view or edit an analysis based on permissions
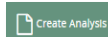
6. Run Reports:

The Agency Administrator can select the **Reports** button (alt+shift+d) to run a report

➔ Select the Reports button and select a report from the dropdown list of reports available in the Run Report Popup

➔ Select the Report Format radio button for PDF, Word, Excel

- Then Select the **Run Reports** button to run the report or

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☐ Select the **Cancel** Button to return to the Agency Bill Analyses Screen

7. **Flags:** Above the Bill Information and Analysis Information toggle arrows there are yes/no flags that can be set for each bill:

☐ **Set/Unset Track Bill Flag (alt+shift+t)**
To indicate interest in a specific bill

☐ **Set/Unset Lead Analysis Flag (alt+shift+l)**
To indicate Lead Analysis

☐ **Set/Unset Testify Flag (alt+shift+2)**
To indicate the need to Testify

☐ **Set/Unset AG Review Flag (alt+shift+2)**
To indicate Attorney General Review

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Agency Bill Analyses (List) Screen – Agency Analyst

1. Navigate:

As an Agency Analyst log into BEARS and navigate to the **Agency Bill Analyses (List) Screen** to view the list of bills

➔ View Bill and Bill Analysis information by toggling between the following selection arrows:

 Bill Information selection – shows a line item per Bill ID and

 Analysis Information selection – shows a line item for each analysis created, a bill can have multiple analyses

➔ **Filter Tools** – the filter can be set for each column by the use of the filters tool on the right hand side

➔ **Column Tools** – the bill /analysis filter options customized by selecting or deselecting the checkbox by each column header

➔ **Other Information Displayed**:

 Rows: provides the number of records returned

 Range and Page Number: The bottom row displays the numeric range of 8 records returned and the page number of the range

2. Show Views/Hide Views:

Any Agency Administrator can select the **Show Views** button and **Hide Views** button (alt+shift+k) as a toggle to show or hide the System Views and Saved Views Selection Columns from the grid

3. View/Edit:

Once a Bill Analysis is created it can be selected from the list of bills on the **Agency Bill Analyses (list)** Screen

➔ Then select the **View/Edit** button (alt+shift+v) is the to navigate to the **Bill Information** Screen to view or edit an analysis based on status and permissions

8. Run Reports:

The Agency Administrator can select the **Reports** button (alt+shift+d) to run a report
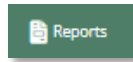
➔ Select the Reports button and select a report from the dropdown list of reports available in the Run Report Popup

➔ Select the Report Format radio button for PDF, Word, Excel

☐ Then Select the **Run Reports** button to run the report or

☐ Select the **Cancel** Button to return to the Agency Bill Analyses Screen

9. Flags: Above the Bill Information and Analysis Information toggle arrows there are yes/no flags that can be set for each bill:

☐ **Set/Unset Testify Flag (alt+shift+2)**
To indicate the need to Testify

☐ **Set/Unset AG Review Flag (alt+shift+2)**
To indicate Attorney General Review

Note: When an analysis is complete, the flags will default to last selected and will not be usable, but will not disabled.

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Bill Information Screen – Agency Analyst

1. Navigate:

Navigate to the **Bill Information** Screen by clicking on the View/Edit button (alt+shift+v) on the Agency Bill Analyses Screen

Note: Bill Information from the LSC is populated and updated once every hour

Important: For real time bill tracking go to the LSC and create a Bill Tracking account.

2. Back and Continue:

Use the **Back** and **Continue** buttons at the bottom of the screen to navigate back to the **Agency Bill Analyses (list)** Screen or continue on to the **Analysis Information** Screen

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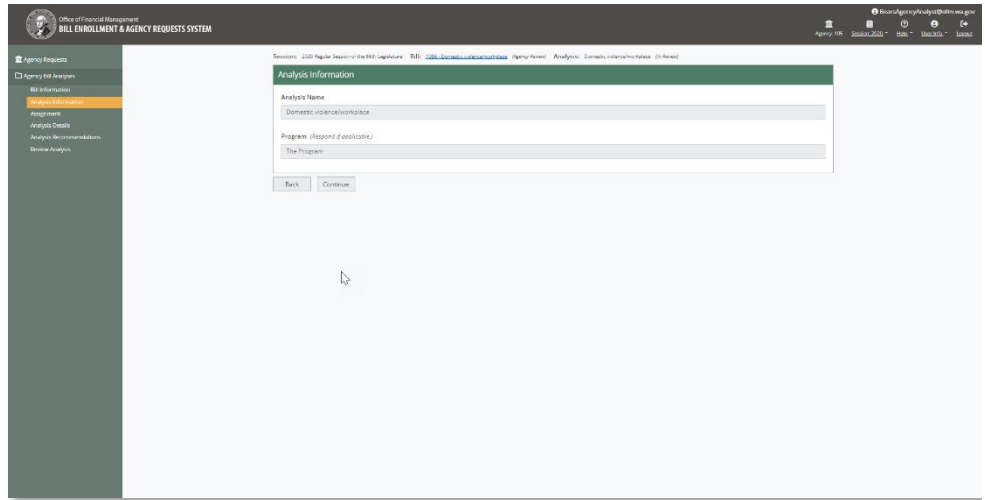## Analysis Information Screen – Agency Analyst

1. **Navigate:**

Navigate to the **Analysis Information** Screen to view the Analysis Name and Program information entered when the Analysis was created

2. **Back and Continue:**

Use the **Back** and **Continue** buttons at the bottom of the screen to navigate back to the **Bill Information** Screen or continue on to the **Assignment** Screen

Assignment – Agency Administrator

1. New Assignment:

Log in as the Agency Administrator and navigate to **Assignment** Screen via the **Continue** button at the bottom of the **Analysis Information** Screen or the left side navigation

➔ Enter the Preparer's Full Name and Preparer's Email Address

➔ Due date is optional

2. Save Successful:

Select the **Save** button(alt+shift+s) to save the assignment, if the save is successful a successful save message will be provided.

3. Save Usuccessful:

Select the **Save** button(alt+shift+s) to save the assignment, if the save is successful an usuccessful save message will be provided with a validation summary.

➔ When the assignment is saved successfully a notification is sent to the Analyst with a link to the Agency Bill Analysis in BEARS

4. If the Agency Administrator navigates away from the **Assignment** Screen without saving, an **Unsaved Changes** popup will be provided
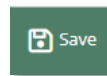
"You have unsaved changes.

You can continue editing and save changes, or discard changes and navigate away."

☐ **Discard Changes** – Select to navigate away without saving

☐ **Continue Editing** – Select to return to the screen to continue and save changes

Assignment – Agency Analyst

1. View Assignment:

Log in as the Agency Analyst to view the Assignment for the Analysis

2. Back and Continue:

Use the **Back** and **Continue** buttons at the bottom of the screen to navigate back to the **Analysis Information** Screen or continue on to the **Analysis Details** Screen

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Bill Information Screen

An Agency Analyst or Agency Admin can continue with an Analysis they are creating or receive a notification of an assignment for a particular bill. Selecting the link in the notification navigates to the Bill Information Screen for the Agency Bill Analysis assigned.

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Analysis Details Screen

1. Analysis Details:

➔ Navigate to the **Analysis Details** Screen either by the left side navigation or the continue button on the **Analysis Information** Screen

2. Analysis Details:

"Complete the fields below. Requirements will need to be prvided before the analysis and/or assignments can be completed. Please work with your agency administrator to determine which questions are required for your agency. If it doesn't apply please indicate N/A."

➔ The unsaved changes popup is provided when navigating away from the screen before saving

"You have unsaved changes.

You can continue editing and save changes, or discard changes and navigate away."

- ☐ **Discard changes** – return to the Analysis Details Screen with no changes
- ☐ **Continue Editing** – Keeps current changes and continue editing

3. Save (Unsuccessful):

Select the **Save** button (alt+shift+s) - If the fields are not complete the following message is provided:

"Analysis Details failed to save."

4. Save (Successful):

Select the **Save** button (alt+shift+s) - When the Analysis Details are successfully saved the following message is provided:

"Analysis Details successfully saved."
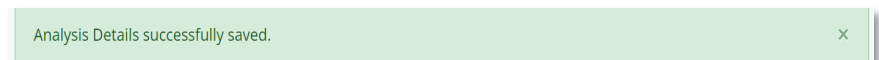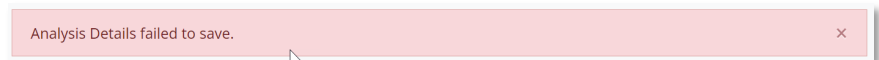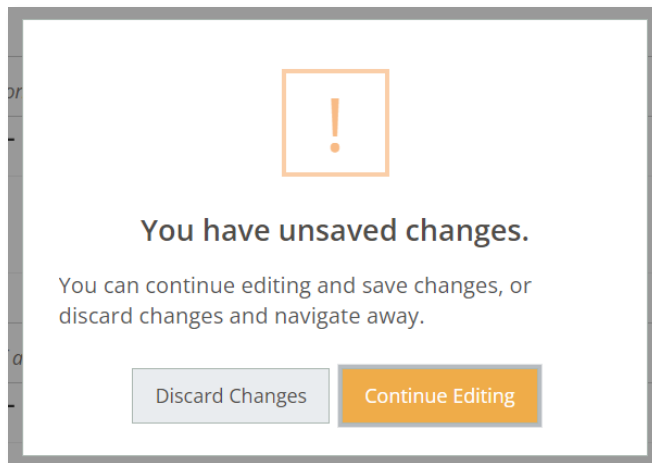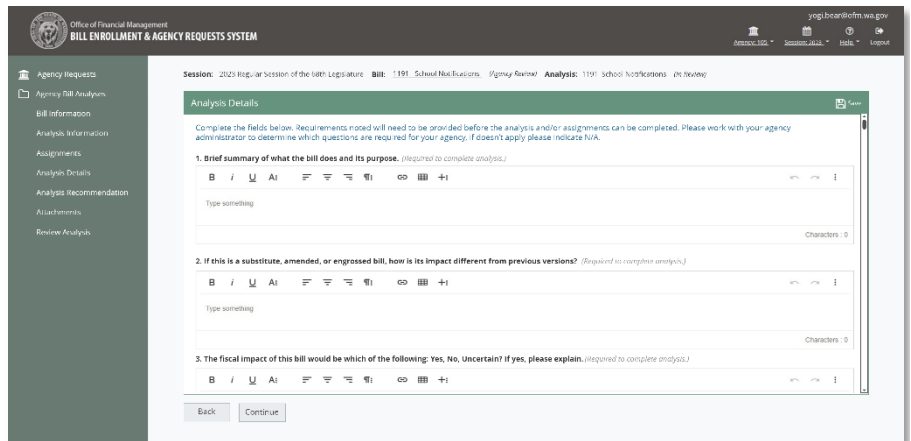
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Analysis Recommendations Screen

1. Analysis Recommendations:

Navigate to the **Analysis Recommendation** Screen either by the left side navigation or the continue button on the **Analysis Details** Screen

➔ **Select one of the following for the Position:**

- ☐ Supports
- ☐ Supports with Concerns
- ☐ Neutral
- ☐ Concerns
- ☐ Opposes
- ☐ Other

And add an explaination for each one

➔ **Select one of the following for the Priority:**

- ☐ **High**
- ☐ **Medium**
- ☐ **Low**
- ☐ **Inactive**

2. Save (Unsuccessful):

Select the **Save** button (alt+shift+s), When the Explanation for the Deny or Conditional Hold fields are not complete the following message is provided:

"An explanation is required."

3. Save (Successful):

Select the **Save** button (alt+shift+s), When the Analysis Recommendations are successfully saved the following message is provided:

"Recommendations successfully saved."

The unsaved changes popup is provided when navigating away from the screen before saving

"You have unsaved changes.

You can continue editing and save changes, or discard changes and navigate away."

- ☐ **Discard changes** – return to the Analysis Details Screen with no changes
- ☐ **Continue Editing** – Keeps current changes and continue editing

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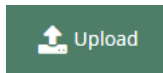Page 14 of 19

Attachments Screen

1. Select:

➔ After the required elements are saved, navigate to the **Attachments** screen by selecting **Continue** at the bottom of the **Analysis Recommendations** screen or by selecting **Attachments** in the left sidebar navigation
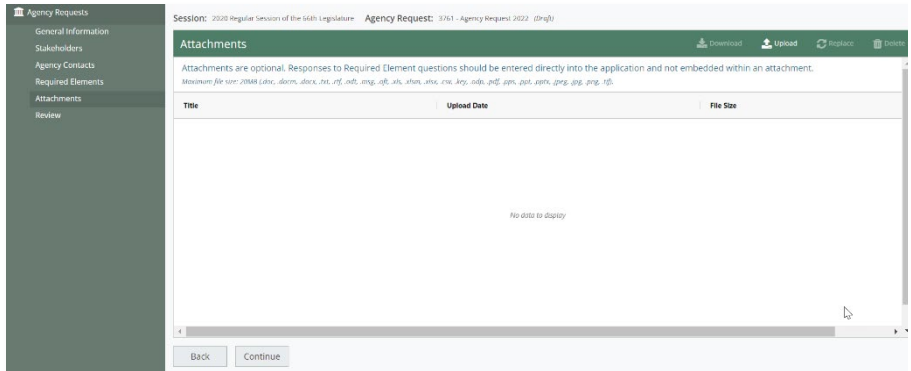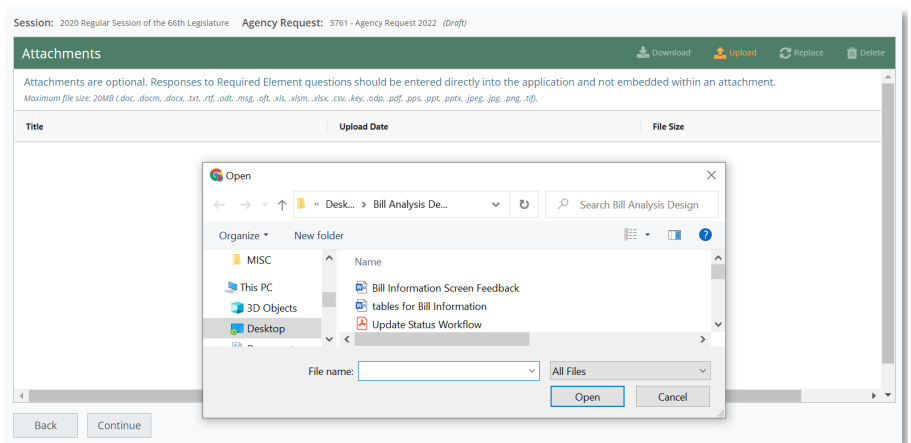

2. Upload:

➔ Select **Upload** (alt+shift+u) to navigate to the files on your computer and select a file to upload

➔ Directly below the Attachments header the following information is provided:

Attachments are optional. Responses to Required Element Questions should be entered directly into the appliaction and not embedded within an attachment.

Maximum file size: 20MB (.doc, .docm, .docx, .txt, .rtf, .odt, .msg, .oft, .xls, .xlsm, .xlsx, .csv, .key, .odp, .pdf, .pps, .ppt, .pptx, .jpeg, .jpg, .png, .tif).


➔Once the file has been uploaded, a message that the file has been successfully uploaded is provided:

"Attachment {name of file} successfully uploaded."
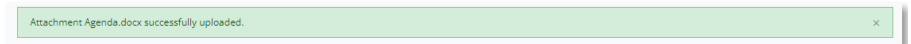
➔If the file is not of the appropriate format for the upload, the user receives the following validation message:

"Attachment failed to upload. Valid file types: (.doc, .docm, .docx, .txt, .rtf, .odt, .msg, .oft, .xls, .xlsm, .xlsx, .csv, .key, .odp, .pdf, .pps, .ppt, .pptx, .jpeg, .jpg, .png, .tif)"
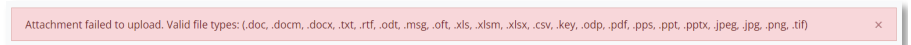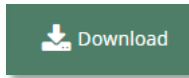
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3. Download:

➜ select the checkbox next to the file to download and select the **Download** button (alt+shift+d) the file automatically downloads to the downloads folder on your computer, there is no validation message for a download

4. Delete:

➜ Select the checkbox next to the file to delete and select the **Delete** button (alt+shift+x) the following delete confimation message is provided:
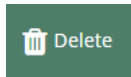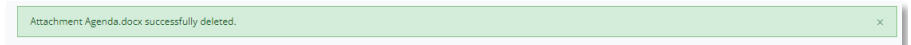
"Delete Confirmation
You are about to delete {Name of File.filetype} this action cannot be undone, continue?"

➜ **Cancel** navigates back to the page with no changes,

➜ **Delete** removes the file from the Attachments list and the following validation message is displayed:

"Attachment {name of file} successfully deleted."

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5. Replace:

➔ Select the checkbox next to the file to replace and select the **Replace** button (alt+shift+c) the following replace confimation message is displayed:
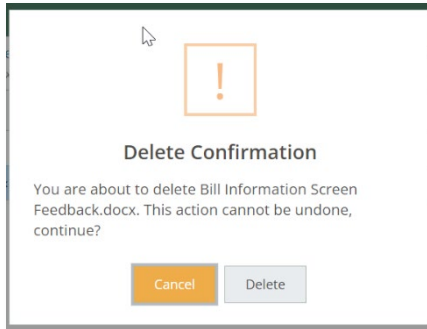
"Replace Confirmation
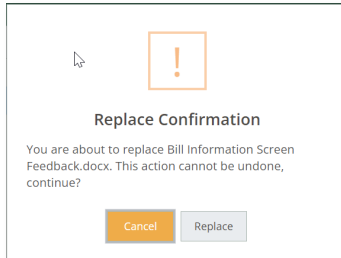
You are about to delete {Name of File.filetype} this action cannot be undone, continue?"

➔ **Cancel** navigates back to the page with no changes,

➔ **Replace** to browse and select a new file. Select and the file chosen replaces the file selected in the list

The following success banner is displayed:

"Attachment {name of file} successfully replaced previous attachment (Name of File}."
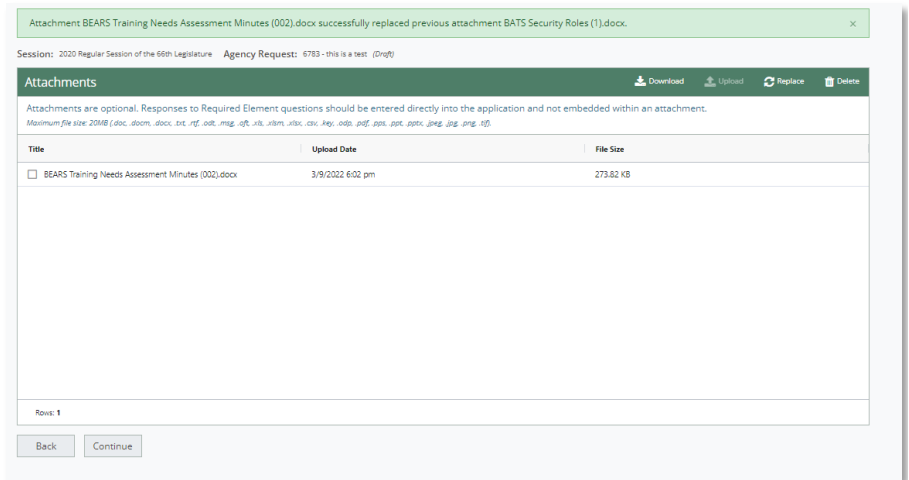
Review and Complete Analysis – Agency Administrator

1. **Select:**

➔ After any optional Attachments have been added, navigate to the **Review** screen by click on the **Continue** button at the bottom of the **Attachments** page or through the left sidebar navigation.

2. **Review and Update:**

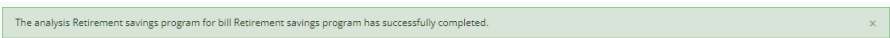➔ Each section of the **Review** screen has an **Update** button used to navigate to the section that needs additional information
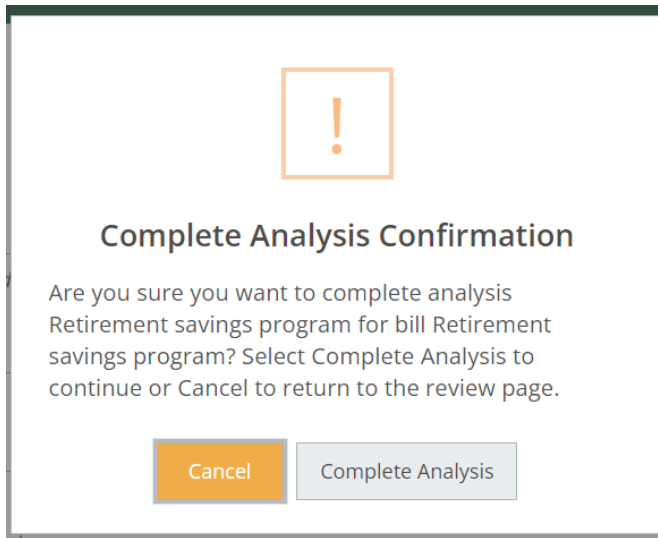
➔ By selecting the **View Summary** button (alt+shift+p) a PDF is generated containing all information entered

3. **Complete Analysis:**

Even if the Analysis has information missing, the Agency Administrator can Select the Complete button at the bottom of the screen to complete the Analysis

➔ The successfully completed message will be provided:

"The analysis {name of analysis} for bill {Bill title} has successfully completed."

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Review Screen – Agency Analyst

4. **Select:**

After any optional Attachments have been added, navigate to the **Review** screen by click on the **Continue** button at the bottom of the **Attachments** page or through the left sidebar navigation.

5. **Review and Update:**

Each section of the **Review** screen has an **Update** button used to navigate to the section that needs additional information
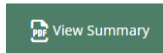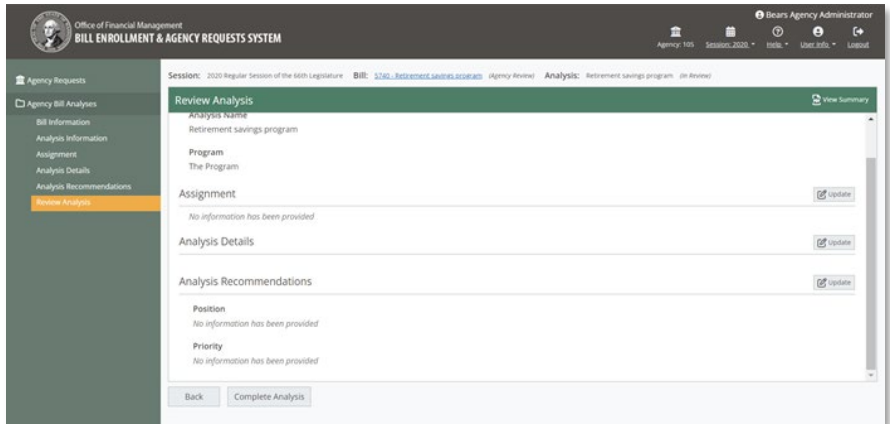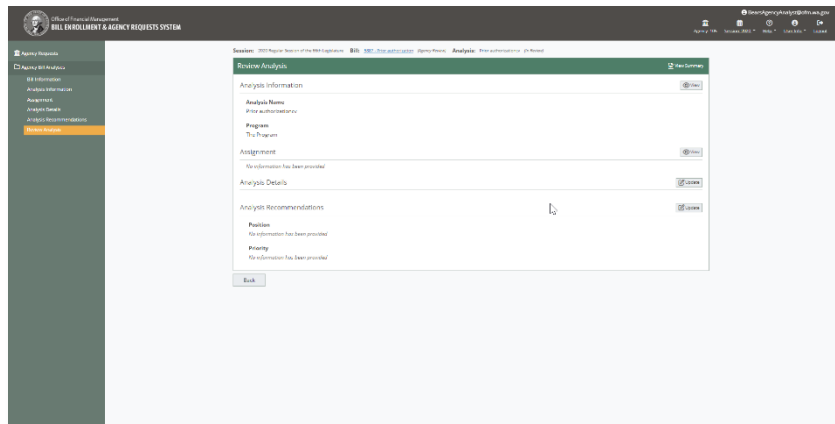
➔ By selecting the **View Summary** button (alt+shift+p) a PDF is generated containing all information entered

6. **Navigate:**

Use the **Back** button to return to the Analysis Recommendations Screen

View Summary

Important: Only the Agency Administrator can complete an Analysis.

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