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).

Bill Tracking - Overview .................................................................................................................................................. 2
Display Bill Information.................................................................................................................................................. 2
Quick Links - Fiscal Notes Website / Legislative Service Center (LSC) Website ......................................................... 2
Bill History .................................................................................................................................................................... 3
Bill Hearings .................................................................................................................................................................. 3
Bill Hearings Report ..................................................................................................................................................... 3
Revised Code of Washington (RCW) ............................................................................................................................ 4
Track Bills ...................................................................................................................................................................... 5
Track Bills - Agency......................................................................................................................................................... 5
Track Bills - Agency Division/Team Tracking ................................................................................................................ 6
Track Bills - Classification .............................................................................................................................................. 7
Track Bills - Related Bills ............................................................................................................................................. 8
   Update Description or Remove Connection for Related Bill ......................................................................................... 9
Track Bills - Who is Tracking This Bill .......................................................................................................................... 9
Bill Information – Overview .......................................................................................................................................... 10
Bill Information - General ............................................................................................................................................ 10
Bill Information - Agency Position ............................................................................................................................... 11
Bill Information - Agency Contacts .............................................................................................................................. 11
Bill Information - Chamber Votes ............................................................................................................................... 12
Bill Information - Sponsors .......................................................................................................................................... 12
Bill Information - Analysis ......................................................................................................................................... 12
Bill Information - Notes ............................................................................................................................................... 13
Agency Bill Analysis - Overview ................................................................................................................................. 14
Agency Bill Analysis - Generate Summary .................................................................................................................. 14
Agency Analysis - General Information ....................................................................................................................... 15
Agency Analysis - Assignments .................................................................................................................................. 16
Agency Analysis - Details ............................................................................................................................................. 17
Agency Analysis - Review Task Details ....................................................................................................................... 19
Agency Analysis - Supplemental Information ............................................................................................................... 19
Agency Analysis - Notes .............................................................................................................................................. 20
Agency Bill Analysis - Start Analysis .......................................................................................................................... 21
Agency Bill Analysis - Ready For Review .................................................................................................................... 22
Agency Bill Analysis - Review Analysis ........................................................................................................................ 22
Agency Bill Analysis - Final Review and Complete Analysis ...................................................................................... 23
   Activate Analysis (Undo Complete).......................................................................................................................... 23
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.

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.

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.

1. Select: Down arrow next to the bill.
2. Select: Bill History.
   ➞ BATS will display additional information about the bill.

Bill Hearings
Use hearings to display additional information about a bill.

1. Select: Down arrow next to the bill.
2. 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

Bill Hearings Report
Use run report to display the hearings report.

   ➞ BATS will display available reports and parameters based on the current view.
   ➞ BATS will display report results.

In this example, we select the hearing schedule report based on the 'all hearings' view.
Revised Code of Washington (RCW)

Use RCWs to display additional information about a bill.

1. **Select:** Down arrow next to the bill.
2. **Select:** RCWs.  
   - BATS will display a list of RCWs associated with the bill.
3. **Select:** RCW name.  
   - BATS will display RCW information.
4. **Select:** Weblink.  
   - BATS will display the Legislative Service Center (LSC) website with additional information about the RCW.
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.

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.


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

5. Select: Next.

   - 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 select a sample division from the list.

The Agency
123 Sample Agency

Select the Division to add or delete a Team Tracking record for this Bill.
Sample

Communications
Executive
Facilities
Finance
Sample

A new Sample Tracking record has been created for bill "0000 - Sample"
Do you have additional Division Tracking actions to perform?
- No Further Action
- Additional Action

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

0000 - Sample Sample Sample Sample Date

Previous Next Cancel
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:** Check the Down arrow next to the bill.

2. **Select:** Classifications.

   BATS will display a list of classifications associated with tracking the bill.

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

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.

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.
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.

   ➔ BATS will display bill information.

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

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


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

Related Bill Associated View

- Add New Related Bill
- Chart Pane
- Run Report
- Export Related Bills

<table>
<thead>
<tr>
<th>Related To</th>
<th>Related From</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0123 - Sample 123</td>
<td>0000 - Sample</td>
<td>Sample</td>
</tr>
</tbody>
</table>
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.

2. **Input**: Description (brief description to explain why you are relating the bill)

   - **Select**: Delete (this will remove the connection to the related bill).

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 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 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.
### 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.

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

3. **Input:** Agency Short Title.

4. **Select:** Agency Position.

5. **Select:** Agency Priority.

6. **Select:** 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.

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

3. **Input:** Name and organization.
   - 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.

5. **Input:** Description.
   - Provide brief description to explain why you are connecting this agency contact to the bill.

6. **Select:** Save.
   - Use the trash can icon to delete an agency contact.
   - Select the agency contact name to update their information.
Bill Tracking and Analysis
Bill Analysis & Tracking System (BATS)

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.

<table>
<thead>
<tr>
<th>Chamber Votes</th>
<th>Senate Votes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chamber</td>
<td>Date</td>
</tr>
<tr>
<td>No Roll Call Vote records found.</td>
<td>No Roll Call Vote records found.</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Sponsors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor Order</td>
</tr>
<tr>
<td>0 Primary Bill Sponsor</td>
</tr>
<tr>
<td>1 Secondary Bill Sponsor</td>
</tr>
<tr>
<td>2 Secondary Bill Sponsor</td>
</tr>
</tbody>
</table>

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 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.

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.

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 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).

2. **Select:** Program/Division.

3. **Select:** 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.

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.

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.

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.

3. Select: 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.

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.

3. **Select:** Policy Effect.
4. **Input:** Description of Policy Effect.
   ➔ Provide a brief description of the 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.

9. **Select:** Appropriation Needed.
10. **Select:** Budget Impacted.
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.

12. **Select:** Continue to Track.
   - If there is no policy effect or fiscal impact, do you want to continue to track the bill?

13. **Select:** Effect on Stakeholder.
14. **Input:** Stakeholder Effect Comments.
   - Provide a brief description of the effect on stakeholders.

15. **Select:** Recommended Position.
   - This is the recommended position for the agency.
16. **Input:** Position Comments.
   - Provide a brief description of the agency position.

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.

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

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

23. **Input:** General Comments.
   ➔ Provide additional 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.

<table>
<thead>
<tr>
<th>Reviewer Name</th>
<th>Reviewer Title/Purpose</th>
<th>Due Date</th>
<th>Activity Status</th>
<th>Actual End</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sample Name</td>
<td>Sample Date/Time</td>
<td>Sample Date/Time</td>
<td>Completed</td>
<td></td>
</tr>
<tr>
<td>Sample Name</td>
<td>Reviewer</td>
<td>Sample Date/Time</td>
<td>Open</td>
<td></td>
</tr>
</tbody>
</table>

   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.
**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.

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**

- Sample

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

- 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.


- BATS will guide you through the analysis details step-by-step with additional information.

5. Input: Analysis information.


- 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.
    BATS will update the status and assignments.

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.

    BATS will display the assigned activity for the review.

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