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# INTRODUCTION TO THE BILL ANALYSIS AND TRACKING SYSTEM (BATS)

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**OFM**

OFFICE OF FINANCIAL MANAGEMENT

# WELCOME!

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Please Silence Your Cell Phones

Sign In Sheet and Handouts

Bathrooms

Building Access and Emergency Exits

Training Material Available for Download

Evaluations

# AGENDA

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What is Introduction to BATS Training?

Learning Objectives

Other topics of interest?

Lessons and Demonstrations

Open Forum: Q&A

Help and Resources

# WHAT IS INTRODUCTION TO BATS TRAINING?

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Addressing topics that result in frequent calls to the Help Desk

Covering topics that are common when first working with BATS

Addressing common questions and issues

Who has taken the BATS eLearning course?

# LEARNING OBJECTIVES

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A basic overview of BATS

Create and submit agency request legislation

Track and analyze bills as they work through the Legislative process

# OTHER TOPICS OF INTEREST?



# **BATS OVERVIEW**



# WHAT IS BATS?

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The Bill Analysis Tracking System (BATS) is used by agencies to manage and track legislation

What does it do?

- BATS allows agencies to:
  - Create, submit, and manage agency request legislation to the Office of Financial Management
  - Track and analyze bills working their way through the Legislature
  - Assign tasks and activities related to bills

Who else uses it?

BATS is also used by OFM and the Governor's Office to make recommendations and decisions on enrolled bills

# ACCESSING BATS

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OFM BATS Product Page:

- <https://www.ofm.wa.gov/it-systems/bill-analysis-and-tracking-system-bats>

BATS is a web-based application:

- <https://xcrm.wa.gov/crmbats/main.aspx>

Secure Access Washington (SAW) access is required for agencies not using Active Directory

- <https://secureaccess.wa.gov/>

Note: BATS prefers the Internet Explorer Browser - you may experience some usability issues in other browsers

DEMONSTRATION #1

# LOGGING INTO BATS AND BASIC NAVIGATION

Watch the instructor demonstrate this  
functionality

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# NAVIGATING BATS



# NAVIGATION BAR

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↑  
Home  
Returns you to  
the home page

↖  
BATS drop-down  
Displays the  
Work Tile Ribbon

↖  
Dashboards drop-down  
Shows current view, as well  
as recently visited pages

↖  
Help  
Provides Help with  
the MS CRM system

# DASHBOARDS & QUEUES

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## Dashboards

Allows users to combine data from multiple areas and display that data on one page

May also be used to apply filters, drill down for more details, or open an task to work on

Custom Dashboards can also be created

## Queues

Track and manage actions assigned to you

Use drop-down to show different views

Can create custom views

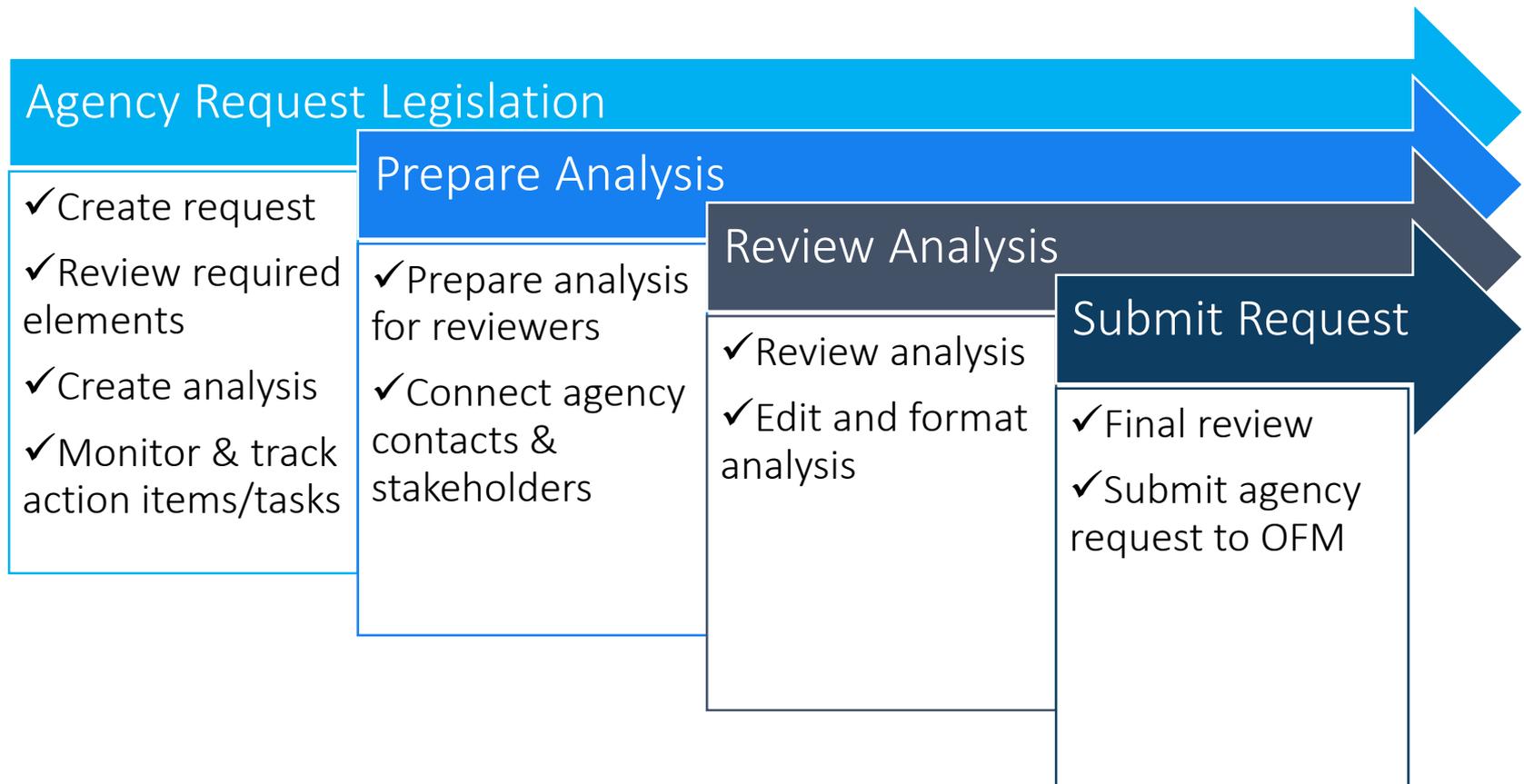
Don't forget to mark your tasks complete when you are done!

# **AGENCY REQUEST LEGISLATION PROCESS**



# AGENCY REQUEST LEGISLATION PROCESS

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# **AGENCY REQUEST LEGISLATION**



# AGENCY REQUEST LEGISLATION

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## What is Agency Request Legislation?

- Used by agencies to initiate their own bills
  - They will find a legislator to sponsor the bill and introduce it to the legislature
- Cabinet agencies that initiate a bill are required to submit their request in a packet to OFM and the Governor's Office for review/approval prior to obtaining legislative sponsors
- The agency coordinates the analysis, stakeholder support and approval processes with OFM

# WHAT MAKES GOOD AGENCY REQUEST LEGISLATION?

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- A clearly defined problem to address
- It addresses the Governor's strategic priorities
- It solves the problem presented
- Any alternatives have been considered
- No unanticipated costs or precedents
- Includes fiscal notes from all affected agencies
- The Assistant Attorney General review is attached

DEMONSTRATION #2

# CREATE AGENCY REQUEST

Watch the instructor demonstrate this  
functionality

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# **PREPARE ANALYSIS**



# ANALYSIS AS A STAND-ALONE ACTIVITY

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Analysis is part of the Agency Request Legislation process

It is also a an important stand-alone task and a required expectation for any bill that you have been assigned

The next few slides address the process and best practices for you to use even if you haven't made an agency request for legislation

# BILL ANALYSIS

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Analysis is a tech, policy, fiscal, and legal review of a bill draft or introduced bill

Agencies prepare analysis on bills to determine impact, issues, support, and recommendations for the governor

Agencies analyze information related to bills and use BATS to update and track that information

# ELEMENTS OF AN ANALYSIS

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Brief Summary

Impact Difference

Policy Effect

- Level
- Describe Impact

Is there a Fiscal Impact?

- Type of Impact
- Annual Impact
- Fiscal Impact Comments

Appropriations Needed

Which Budget Impacted

Others Impacted

Continue to Track

Stake Holder Effect

Recommended Position

Issue to Testify On

Effect on Rules

AG Review

General Comments

- ▶ Elements are the same through screen and the Analysis Wizard

# ANALYSIS QUESTIONS

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1. If this is a substitute, amended, or engrossed bill?
  - How does it differ from the previous version?
2. What would be the policy effect of this bill?
3. Is there a fiscal impact?
4. What other divisions of your agency, other state agencies, or local governments would be impacted by this bill?
5. What is the bill's effect on any agency stakeholders?
6. What is the agency's recommended position on this bill?
7. Do you recommend that we testify?
8. If enacted, will the bill require a new rule or revise an existing rule?
9. Should the Attorney General review the bill?

DEMONSTRATION #3

# PREPARE ANALYSIS

Watch the instructor demonstrate this  
functionality

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# COMPLETE THE ANALYSIS

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Attachments and more info can be added into the Notes section

Click on Generate Summary to review

When complete select Ready to Review to send to the first reviewer

Remember to close out the task in your queue by selecting Mark Complete!

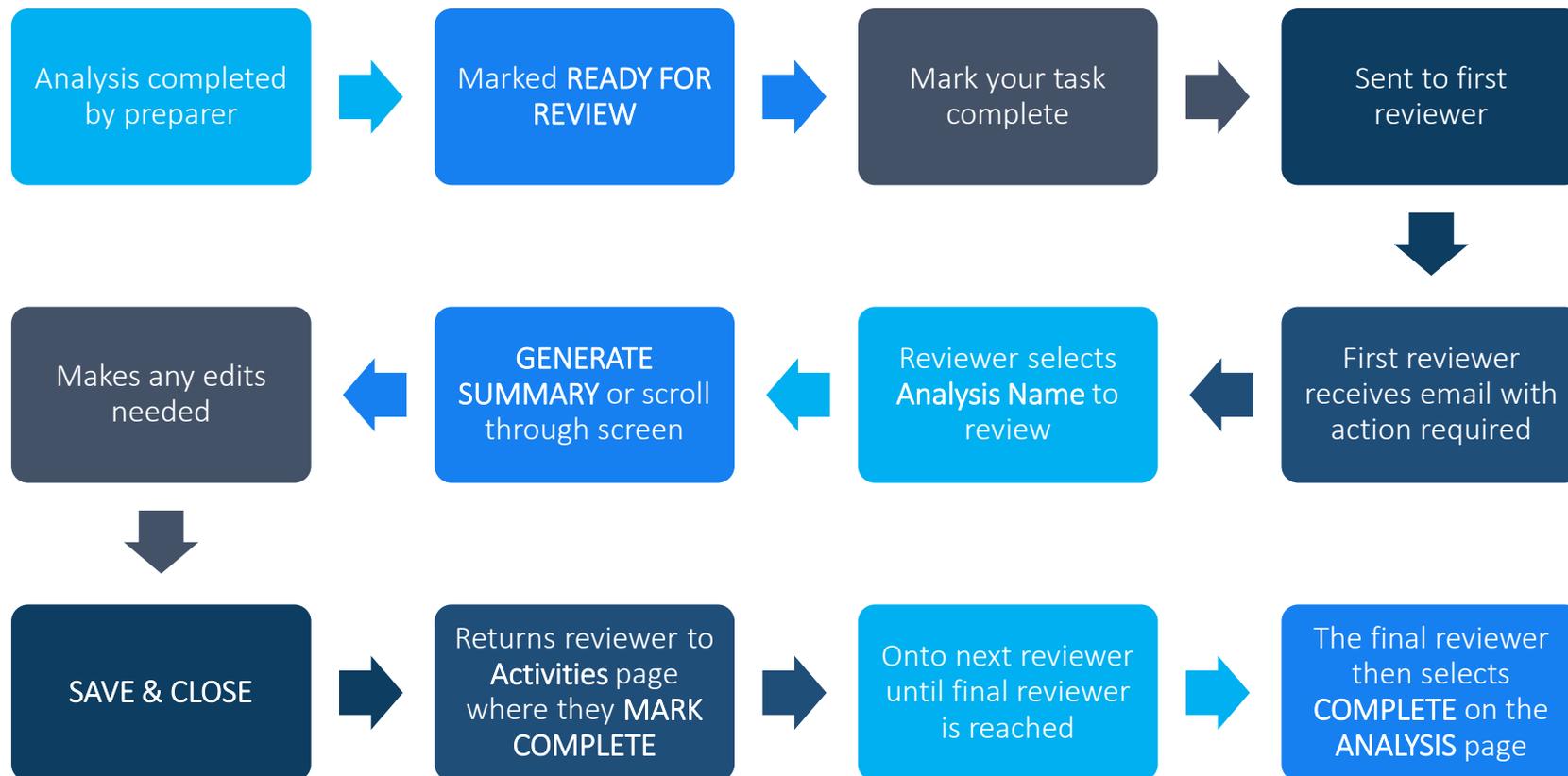
- It's the only way to move the analysis forward in the review process

# REVIEW ANALYSIS



# REVIEW ANALYSIS PROCESS

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## REVIEW ANALYSIS PROCESS (CONT.)

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After the review process is complete, the request is sent to OFM by the agency admin

- BATS will provide edit checks for required elements

Analysis can be withdrawn after submittal by agency admin

DEMONSTRATION #4

# REVIEW ANALYSIS

Watch the instructor demonstrate this  
functionality

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**SUBMIT REQUEST**



DEMONSTRATION #5

# SUBMIT REQUEST

Watch the instructor demonstrate this  
functionality

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# **BILLS OVERVIEW**



# BILLS

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BILL ANALYSIS & TRACKING SYSTEM

BATS ▾

Bills >

Bill information is imported into BATS from the Legislative Service Center, or LegTech, on an hourly basis.

Security ensures each agency owns and controls access to their information

OFM cannot see an Agency Request until it's been submitted

Use the drop downs to change the VIEW of the data you are seeing

- Most popular: Bills My Agency is Tracking
- You can filter what you see by clicking on the filter icon on the far right, then clicking on the arrow of the column you want to filter on

You can Export this view to Excel

## MORE ABOUT BILLS...

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The Bill Number Stays the same for the life of the Bill

The Bill ID changes and the most current version is displayed, you can see previous versions in the Bill History Screen

Bill numbers are reused every two years

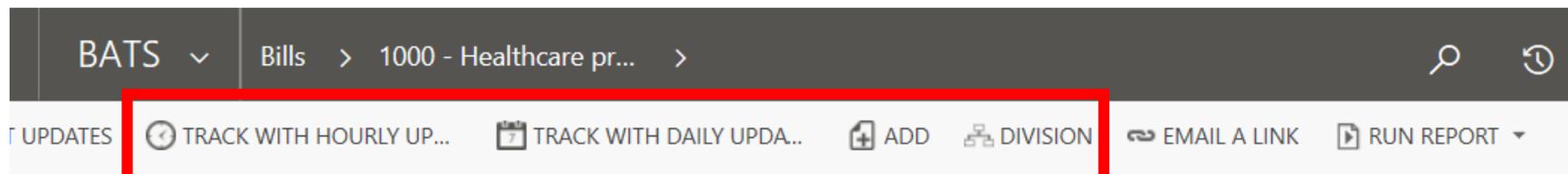
Watch for similar bills that have different numbers

# **BILL TRACKING & NOTIFICATIONS**



# BILL TRACKING

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## Bill Screen

- You can use the tracking buttons to receive regular notifications regarding a bill

Certain roles can assign tracking to all the users in an agency, or only specific divisions within the agency

# TIPS AND TRICKS

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When experiencing unexpected issues in BATS, clear your browser cache

If you access BATS via SAW, your SAW and BATS email must be the same

The search window in BATS only searches for matches in the first column

You can use the asterisk (\*) for a wild card search

Mark your tasks complete when you are done with your action

You cannot successfully Save until all the required fields are complete

Don't forget to Save your request or you will not be able to move onto Analysis

# Q&A



# STAYING INFORMED

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To get copies of the latest system documentation:

- <https://ofm.wa.gov/it-systems/bill-analysis-and-tracking-system-bats>

OFM Budget:

- <https://ofm.wa.gov/budget>

Sign up for GovDelivery:

- <https://public.govdelivery.com/accounts/WAGOV/subscriber/new>

# WHO TO CONTACT WITH QUESTIONS?

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## OFM Help Desk

- Phone: 360.407.9100
- Email: [HereToHelp@ofm.wa.gov](mailto:HereToHelp@ofm.wa.gov)

## Budget Policies and Procedures:

- Follow the link to find your OFM Budget Analyst:  
<https://ofm.wa.gov/budget/budget-staff-agency-assignments>

# RECOMMENDED TRAINING

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## OFM - Fiscal Notes System (FNS) Training

- Course Code: OFM\_FNSTraining
- Representatives from OFM will provide an introduction to the basic operation of FNS in a large audience format, including a live demonstration of FNS usage, and an explanation of FNS best practices.

## WA-State - Bill Analysis and Tracking System (BATS): Tracking and Analysis (eLearning)

- Course Code: BATS:\_Tracking\_&\_Analysis\_ORG
- <https://gm1.geolearning.com/geonext/wasdop/coursesummary.coursecatalog.geo?id=22507234234>



# PLEASE COMPLETE OUR SURVEY!

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Any questions?

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