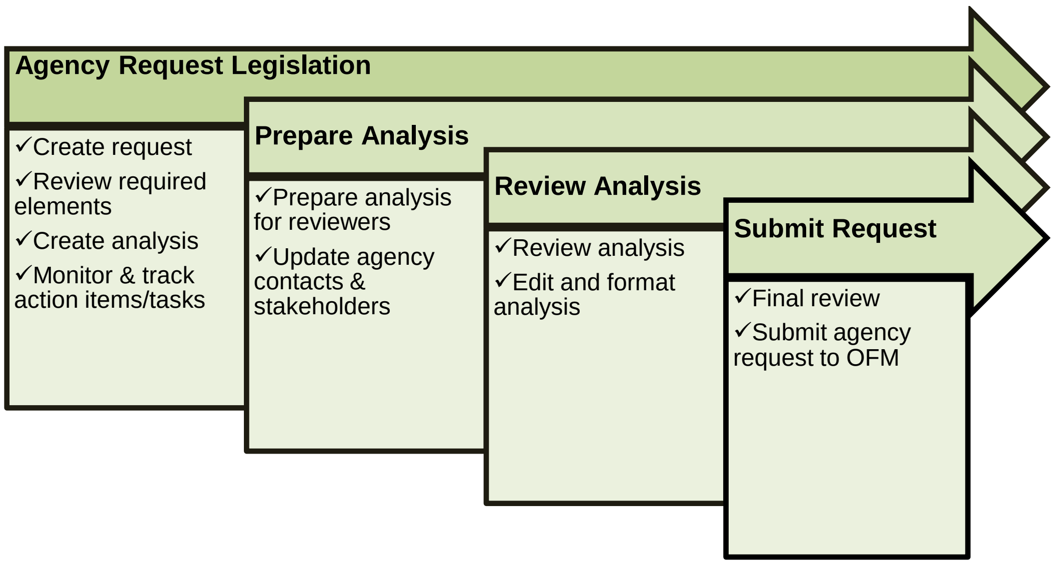
BATS uses standard tools and processes to support agency request legislation.

- ✓ Agency request legislation is used by agencies to initiate their own bills. They coordinate their agency analysis, stakeholder support, and approval processes with OFM based on current instructions for the legislative session.



Agency Request Legislation - Overview

BATS uses standard tools and processes to support agency request legislation based on current instructions for the legislative session.

✓ BATS will automatically update the status for agency request legislation as it moves through the analysis and review process. For example, a new request will remain in 'draft' status until it is submitted to OFM.

Create New Agency Request

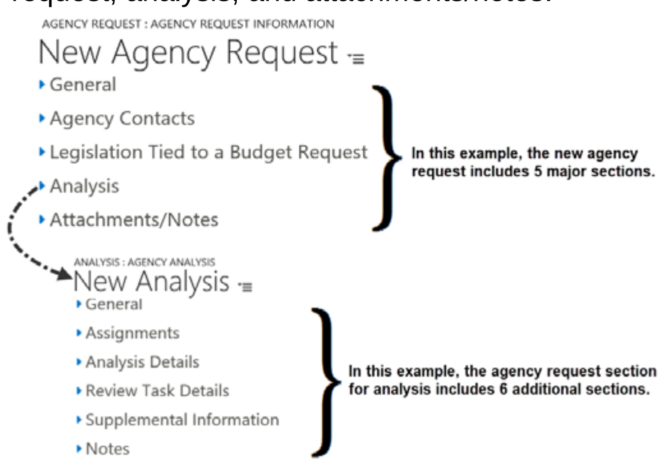
1. **Select:** Down arrow next to BATS.
2. **Select:** Agency Requests.

3. **Select:** New.

➔ BATS will display several sections to collect information for the agency request.

➔ You cannot save the new request until required information is input. For example, you need to input a short title in the [general section](#) and select yes or no in the [legislation tied to a budget request section](#) before you can save the new request.

In this example, the new request includes sections to collect general information, agency contacts, legislation tied to a budget request, analysis, and attachments/notes.



Display Required Elements Checklist

Use 'required elements' to display a checklist for the agency request based on current instructions for the legislative session.

1. **Select:** Required Elements.

➔ BATS will display the required elements checklist.

Agency Request - General Information

Use the general section to provide information based on required elements for the legislative session.

1. **Select:** General.	General
2. **Input:** Short Title.	Short Title * Sample
3. **Input:** Short Decription. ➔ Use plain talk to provide a clear and concise description for the intent of the agency request.	Short Description Sample information
4. **Select:** Program (if applicable for your new agency request).	Program
5. **Input:** Final Z-Draft #. ➔ Format is Z-4digit.1digit (for example, Z-0001.1).	Final Z-draft # is provided to you by the code reviser's office (it is assigned to bills drafted by an agency before they have a valid bill number). Final Z-Draft #
6. **Select:** Owner. This is the agency owner for the request.	Owner * Sample
7. **Select:** Primary Contact. This is the agency point of contact for the request.	Primary Contact * Sample
8. **Input:** AAG Contact. This is the agency attorney general contact name.	AAG Contact
9. **Review:** Approved Checkbox. ➔ BATS will display additional details if checkbox is not checked.	In this example, the approval checkbox is selected to indicate the proposal will move forward to OFM/Governor's office. Approved? ☑
10. **Review:** Emergency Clause Checkbox. ➔ BATS will display additional details if checkbox is checked.	In this example, the checkbox is not selected. Emergency Clause? ☐
11. **Review:** Previously Requested Checkbox. ➔ BATS will display additional details if checkbox is checked.	In this example, the checkbox is not selected. Previously Requested? ☐
12. **Select:** Save.	Save

Agency Request - Agency Contacts

Use the agency contacts section to provide information about stakeholders and other contacts based on required elements for the legislative session.

1. **Select:** Agency Contacts.

Agency Contacts

2. **Select:** plus icon.
➔ BATS will prompt you for agency contact information.

3. **Input:** Name and Organization.

Name and Organization (if applicable) *

Sample

➔ 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. **Input:** Description.
➔ Provide a brief description. For example, describe how the contact and their organization is connected to the intent of the agency request.

Description

5. **Select:** Role.
6. **Select:** Position.

Role *
- Analysis Contact
- Ceremony Contact
- Division Coordinator
- Stakeholder
- Subject Matter Expert

Position
- Supports
- Supports with Concerns
- Neutral
- Concerns
- Opposes
- No Position
- Other

7. **Select:** Save.
➔ Use the trash can icon to delete an agency contact.
➔ Select the agency contact name to update their information.

Name ↑

Sample

Save

In this example, we hover the cursor over the agency contact information to select the trash can icon.

Name ↑	Role	Position	Description
Sample	Sample	Sample	Sample

Agency Request - Legislation Tied to a Budget Request

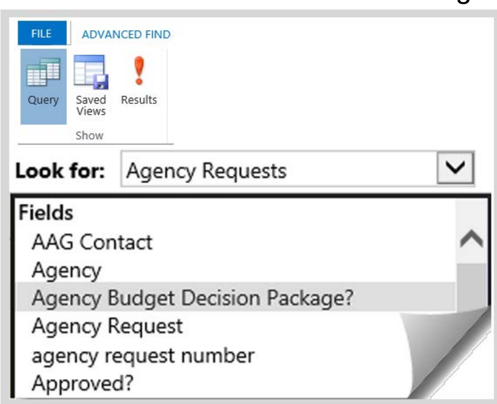
Use the legislation tied to a budget request section to indicate whether the proposed legislation is tied to a budget request.

1. **Select:** Legislation tied to a budget request.

2. **Select:** No or Yes.
➔ This indicates if the request is tied to a budget request.

3. **Select:** Save.

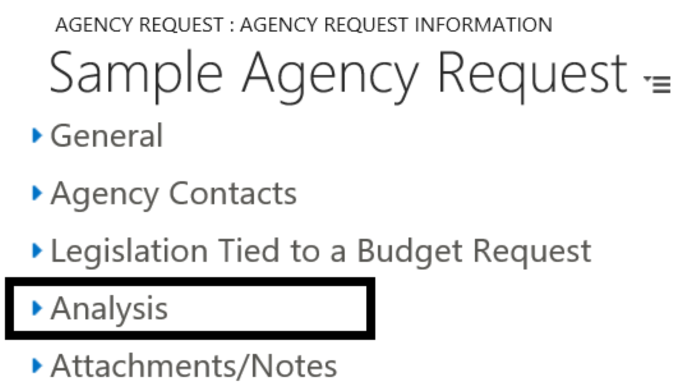
The field for ‘agency budget decision package’ is available in advanced find. For example, you can use advanced find to look for agency requests with or without budget decision packages.



Agency Request - 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 request analysis.



Agency Request - Attachments/Notes

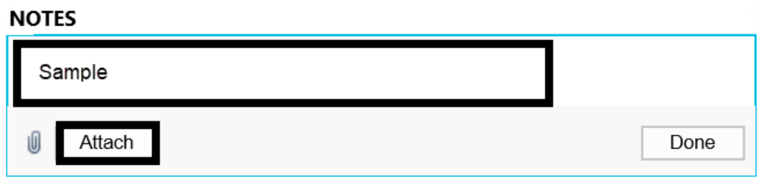
Use the attachments/notes section to provide additional information for the agency request.

✓ This section is part of the agency request (there is a separate section for agency analysis notes).

1. **Select:** Attachments/Notes.

2. **Input:** Notes.
   -- and/or --
   Select: Attach.

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



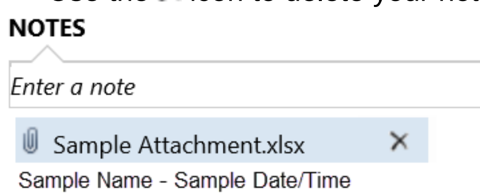
3. **Select:** Done.

➔ 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.



Agency Request Analysis - Overview

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

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

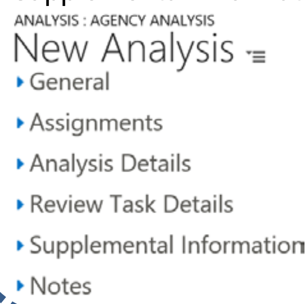
1. **Select:** Analysis.

2. **Select:**  plus icon.

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

➔ You cannot select the plus icon if the agency request has not been created yet. For example, BATS will display 'to enable this content, create the record' because you cannot create the analysis until the agency request is created and saved.

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

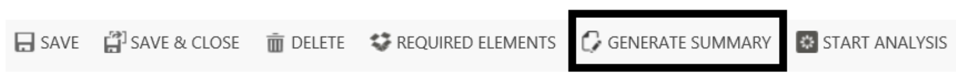


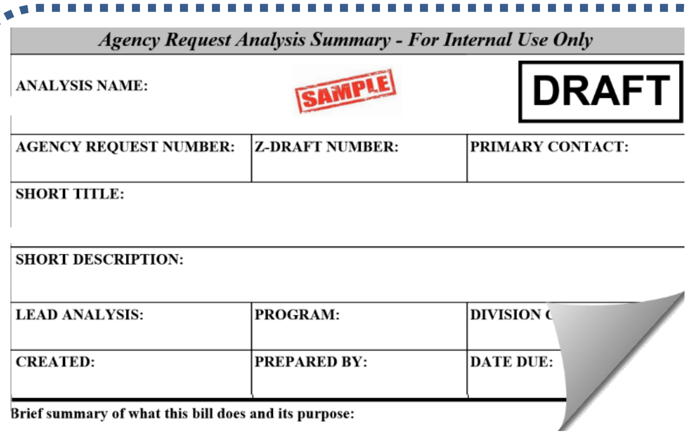
Agency Analysis - Generate Summary

Use generate summary to display analysis information for the agency request.

1. **Select:** Generate Summary.

➔ BATS will open a browser tab to 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 for the agency request.

1. **Input:** Analysis Name.
   ➔ Use up to 100 characters to input a name for your agency analysis.

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 request, create a new analysis record, and make assignments so that other BATS users in their agency 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

Use the details section to provide analysis details for the agency request. 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 if needed.
- ✓ Use plain talk to provide clear and concise answers for the narrative sections to help ensure decision makers can easily understand and prioritize your agency request.

1. **Input:** Brief summary.

➔ Provide a brief summary/purpose.

2. **Input:** Impact Difference.

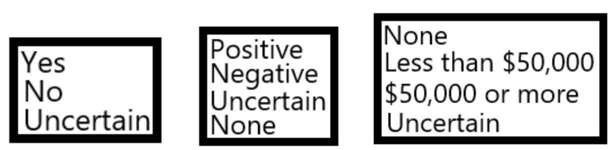
➔ If this is a substitute, amended, or engrossed bill, provide a brief description of how the impact is different from previous versions.

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?

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 +

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 +

17. **Select:** Testify (Yes/No).

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

18. **Input:** Issues to Testify On.

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

No or Yes

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?

Yes
No
Uncertain

Comment on rules +

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 +

Source B I S x² Ix Styles Format

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

General comments +

Source B I S x² Ix Styles Format

24. **Select:** Save.

Save

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.

Review Task Details

➔ In this example, the task details are 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 and prioritize your agency request.

1. **Select:** Supplemental Information.

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

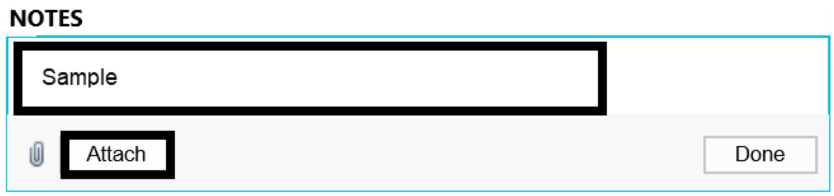
Use the notes section to provide additional information for the agency analysis.

✓ This section is part of the agency analysis (there is a separate section for agency request notes).

1. **Select:** Notes.

2. **Input:** Notes.
   -- and/or --
   Select: Attach.

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



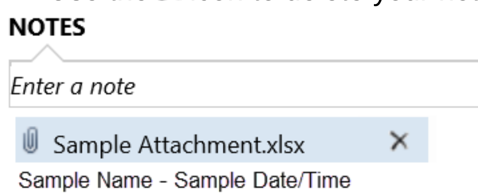
3. **Select:** Done.

➔ 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.

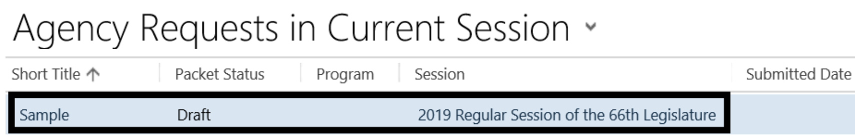


Agency Analysis - Start Analysis

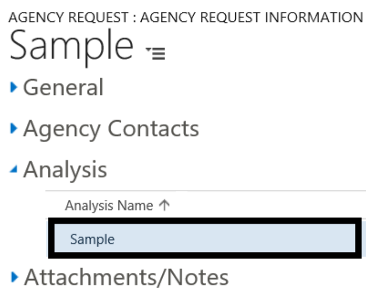
Use 'start analysis' to input analysis for the agency request.

- ✓ 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 and prioritize your agency request.
- ✓ Remember to select 'mark complete' after you finish the analysis. When you finish your action item and mark the item complete, BATS will update the status and assignments.

1. **Select:** Agency Request.

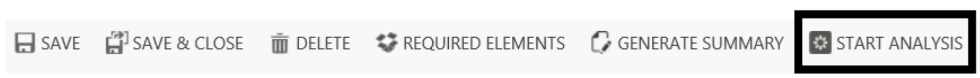


2. **Select:** Analysis.
3. **Select:** Analysis Name.

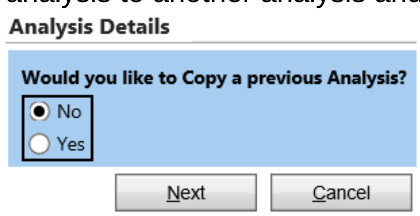


4. **Select:** Start Analysis.

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



➔ If the agency request includes more than 1 analysis, BATS will display a prompt so that you can copy another analysis from the same request. For example, you can copy information from one analysis to another analysis and then quickly edit the information.

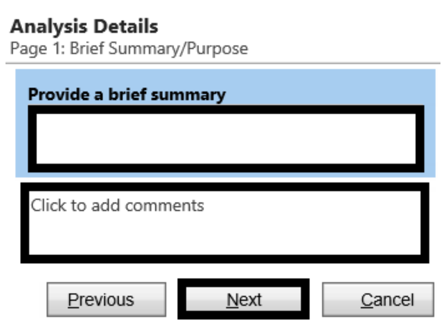


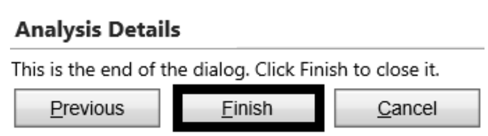
5. **Input:** Analysis information.
6. **Select:** Next.

➔ 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.





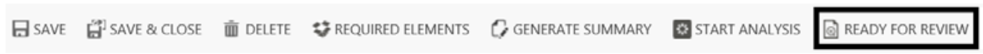
8. **Select:** Save.

Agency 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 Analysis - Review Analysis

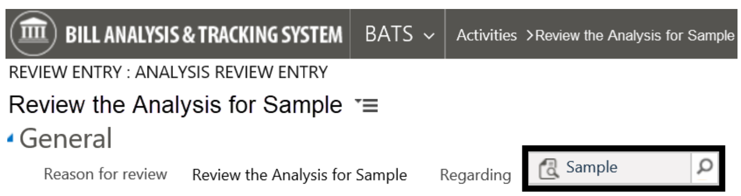
BATS will automatically send you an email when you are assigned to review agency analysis.

✓ 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.

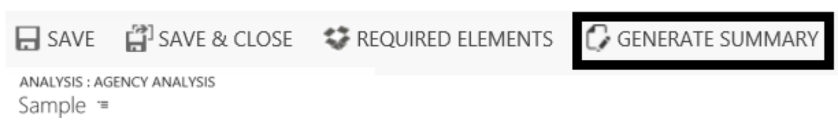
1. **Select:** Link to the analysis that needs to be reviewed.

➔ BATS will display the agency analysis sections.



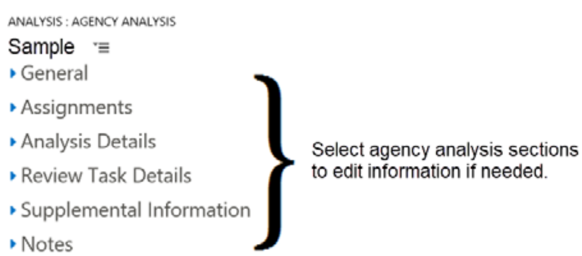
2. **Select:** Generate Summary.

➔ BATS will open a browser tab to display a summary of the analysis so that you can review the information.



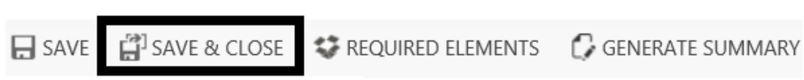
3. **Edit:** Agency analysis information if needed.

➔ Scroll down or select agency analysis sections to edit information if needed.



4. **Select:** Save & Close.

➔ BATS will display the assigned activity for the review.



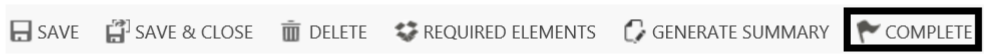
5. **Select:** Mark Complete.

➔ BATS will update the status and assignments.

Agency Analysis - Final Review/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 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 the activate option to reset (unlock) analysis steps on a completed analysis for a draft request. 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 that you can make additional updates and select 'in review' again to restart the review process.

Agency Request - Submit Agency Request to OFM

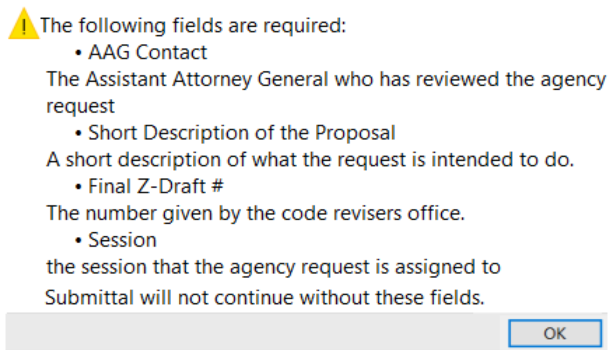
Agency administrators can submit an agency request to OFM.

✓ BATS will automatically update the status for agency request legislation as it moves through the analysis and review process. For example, a new request will remain in 'draft' status until it is submitted to OFM.

1. **Select:** Submit.

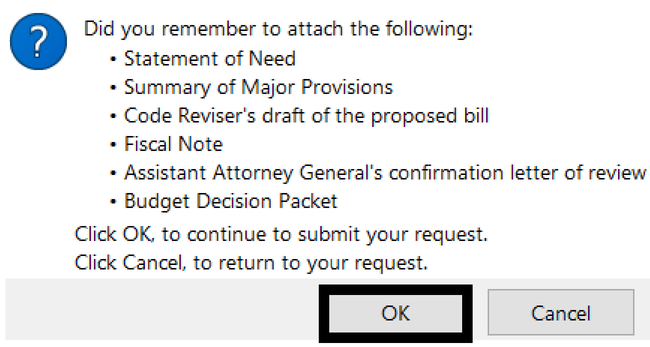
➔ BATS will provide edit checks to ensure required elements are included in the agency request.

In this example, BATS provides an error message based on the edit check for required elements.



2. **Select:** OK.

➔ BATS will update the status of the request.



Withdraw Agency Request (Undo Submit)

Agency administrators can withdraw an agency request if the status is 'submitted to OFM'. For example, you may need to use this if you accidentally selected submit for the agency request.

✓ Contact your OFM budget analyst to coordinate next steps if you need to withdraw an agency request.

1. **Select:** Withdraw.

➔ BATS will update the status of the request.