

WELCOME! THE PRESENTATION WILL BEGIN SHORTLY...

1. Test your audio to ensure that it is working correctly
 - To change your speaker, microphone, or camera settings, select More actions (...) > Show device settings in your meeting controls



- Then, select the speaker, microphone, and camera options you want
 - The instructors are standing by to provide assistance if needed
2. Use **Show conversation** to open the **Meeting chat** panel
 - You can use **Meeting chat** to ask questions or respond
 3. Please press the microphone button (mute your PC) when not speaking





NOVEMBER 2020

INTRODUCTION TO THE BILL ANALYSIS AND TRACKING SYSTEM (BATS) VIRTUAL TRAINING

Josh Rogers

Steven Puvogel

Gaius Horton

Chris Soots

OFM

OFFICE OF FINANCIAL MANAGEMENT

You will be participating in an event where
video and audio recording may occur.

AGENDA

Welcome Information

Roll Call/Attendance check

What is Introduction to BATS Training?

What's New?

Learning Objectives

Other Topics of Interest?

Lessons and Demonstrations

Help and Resources



WE ARE HAPPY YOU'RE HERE!

This session is being recorded

Break

Same content as the in-person class

In case we get disconnected...

Handouts and job aids

Training material available at ofm.wa.gov

Evaluations



NEEDED FOR COURSE COMPLETION CREDITS

ATTENDANCE CHECK

If your full name isn't shown in the Teams Participants list, please let us know that you are here.

OFM

OFFICE OF FINANCIAL MANAGEMENT

WHAT IS INTRODUCTION TO BATS TRAINING?

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

A basic overview of BATS

How to create and submit agency request legislation

How to track and analyze bills as they work through the Legislative process

Some topics include a paired demonstration in a sandbox environment

OTHER TOPICS OF INTEREST?



WHAT'S NEW FOR 2020?

- Improved browser compatibility - now works with Google Chrome!



“BEARS” COMING IN 2022!

- A new applications called the Bill Enrollment and Agency Requests System or “BEARS” is expected to be released in 2022
- It will replace the Microsoft CRM platform with a more appropriate platform
- New, consistent design for all new OFM web applications to make it easier for users to learn new applications
 - BEARS is designed to look, feel, and operate similar to ABS



BATS OVERVIEW



WHAT IS BATS?

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

OFM BATS Product Page:

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

BATS is a web-based application:

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

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

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

DEMONSTRATION #1

LOGGING INTO BATS AND BASIC NAVIGATION

Watch the instructor demonstrate this
functionality

OFM

OFFICE OF FINANCIAL MANAGEMENT



NAVIGATING BATS



NAVIGATION BAR



↑
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

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

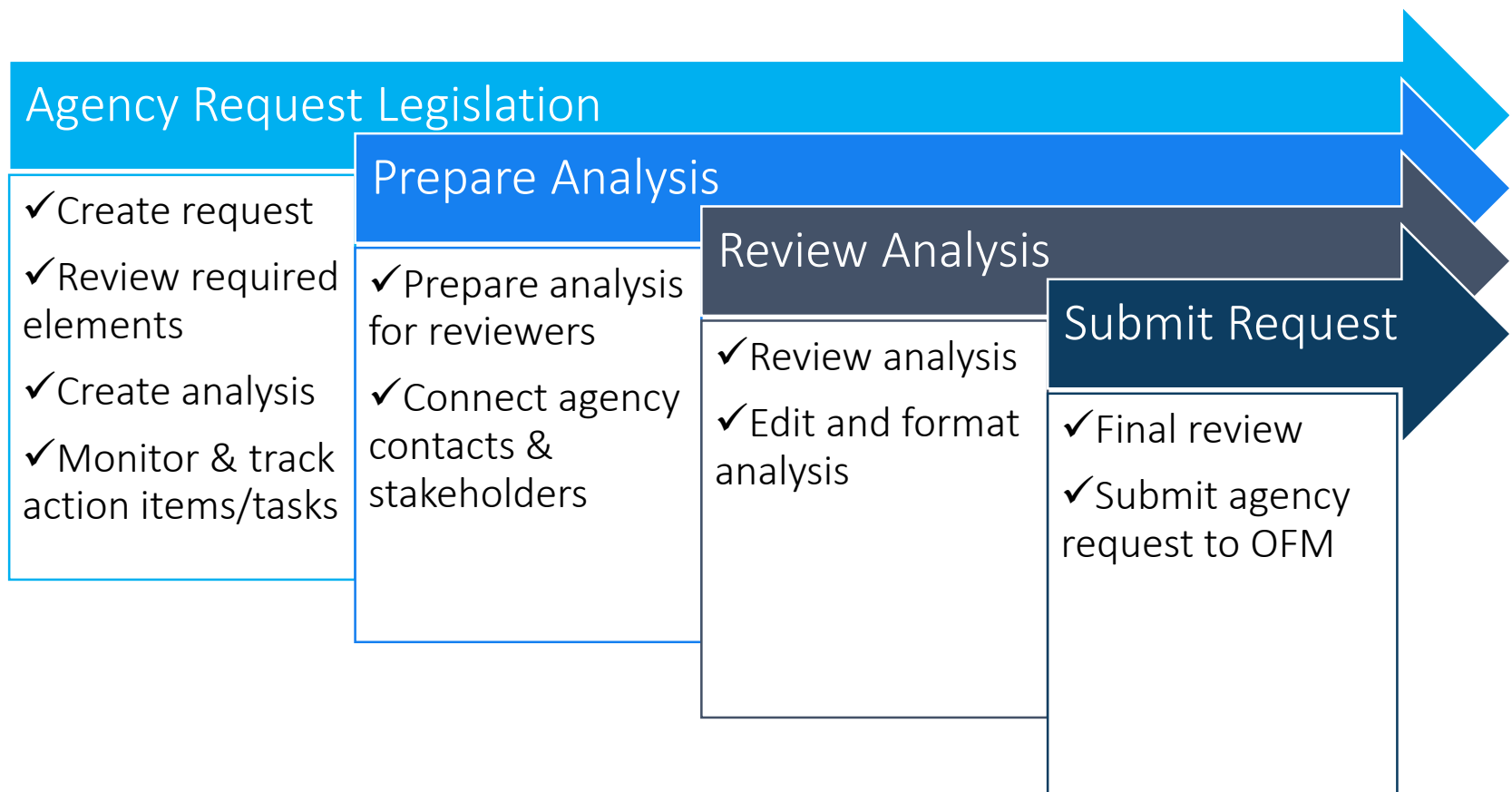
Don't forget to mark your tasks complete when you are done!



AGENCY REQUEST LEGISLATION



AGENCY REQUEST LEGISLATION PROCESS



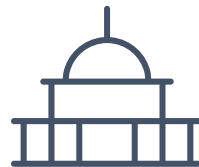
AGENCY REQUEST LEGISLATION

What is Agency Request Legislation?

- Used by agencies to initiate their own bills
 - Agencies 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?

- 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

OFM

OFFICE OF FINANCIAL MANAGEMENT





**BREAK – RETURN
AT 3:00 PM**

PREPARE ANALYSIS



ANALYSIS AS A STAND-ALONE ACTIVITY

Analysis is part of the Agency Request Legislation process

It is also 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

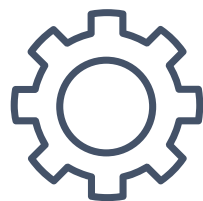


WHAT IS BILL ANALYSIS?

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

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

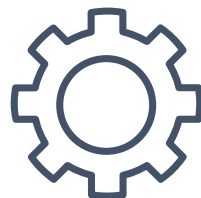
Recommended Position

Issue to Testify On

Effect on Rules

AG Review

General Comments



DEMONSTRATION #3

PREPARE ANALYSIS

Watch the instructor demonstrate this
functionality

OFM

OFFICE OF FINANCIAL MANAGEMENT



COMPLETE THE ANALYSIS

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!**

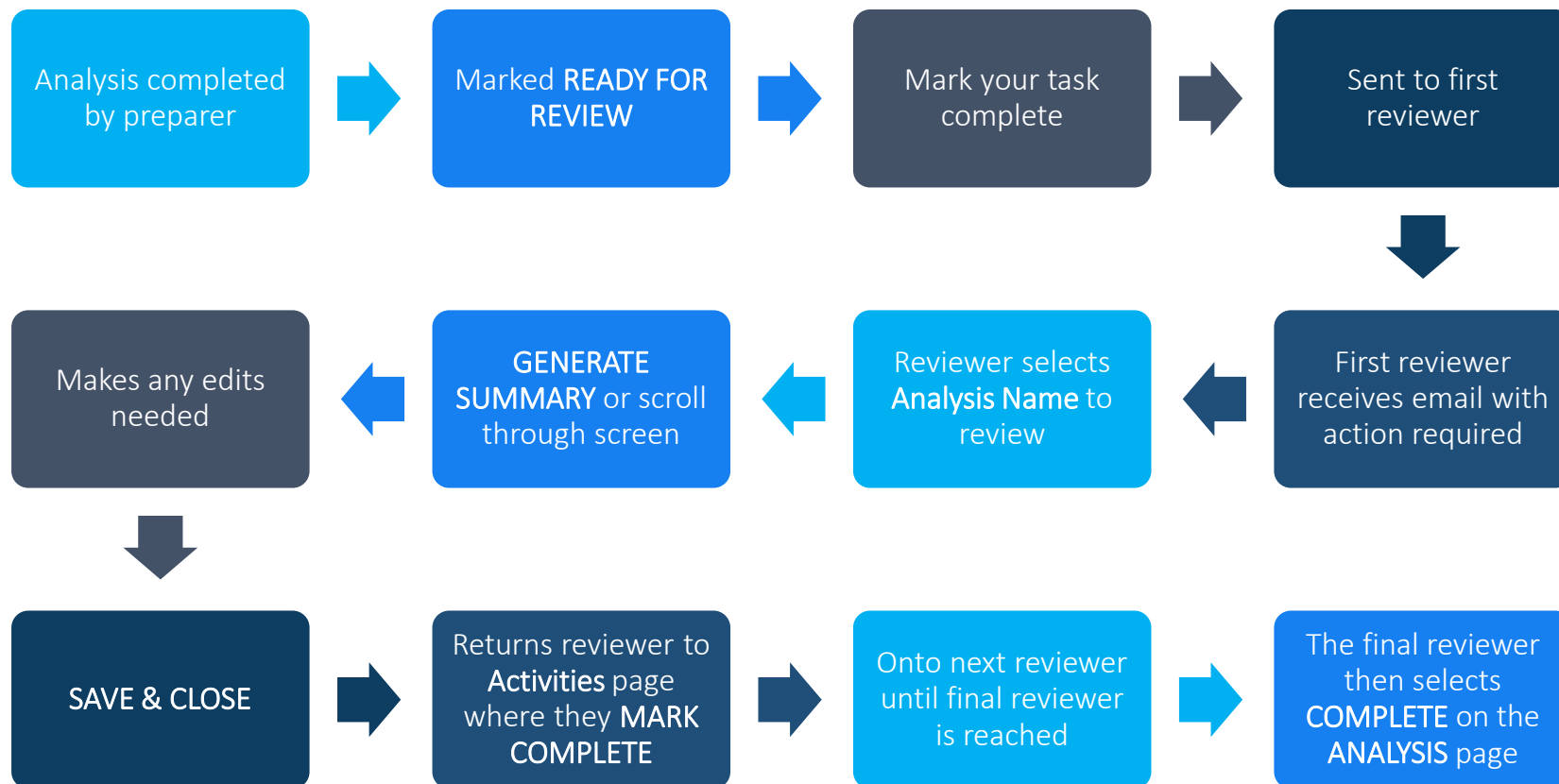
- It's the only way to move the analysis forward in the review process



REVIEW ANALYSIS



REVIEW ANALYSIS PROCESS



REVIEW ANALYSIS PROCESS

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

OFM

OFFICE OF FINANCIAL MANAGEMENT



SUBMIT REQUEST



DEMONSTRATION #5

SUBMIT REQUEST

Watch the instructor demonstrate this
functionality

OFM

OFFICE OF FINANCIAL MANAGEMENT



BILLS OVERVIEW



BILLS



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...

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

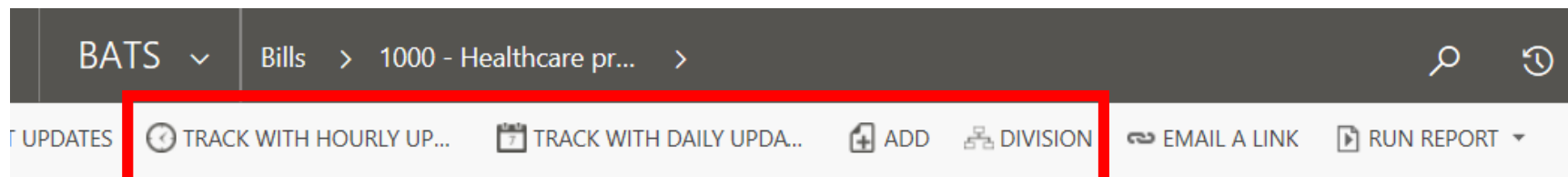
Watch for similar bills that have different numbers



BILL TRACKING & NOTIFICATIONS



BILL TRACKING



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

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

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?

OFM Help Desk

- Phone: 360.407.9100
- Email: 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

OFM Bill Analysis and Tracking System (BATS): Tracking and Analysis (eLearning)

- Course Code: BATS:_Tracking_&_Analysis_ORG

OFM Fiscal Notes System (FNS) Training

- Recorded demonstrations available on ofm.wa.gov:
 - Creating a Fiscal Note in FNS (YouTube)
 - FNS Training Presentation 2019 (YouTube)
- Virtual training coming in January 2021





PLEASE COMPLETE OUR SURVEY!

OFM Enterprise Applications Training:
Chris.Soots@ofm.wa.gov

Any questions?

OFM

OFFICE OF FINANCIAL MANAGEMENT

BACKUP



ANALYSIS QUESTIONS

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?

