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

Josh Rogers
Steven Puvogel
Gaius Horton
Chris Soots

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.
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
  o 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:
  o Create, submit, and manage agency request legislation to the Office of Financial Management
  o Track and analyze bills working their way through the Legislature
  o 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:


BATS is a web-based application:

- Launch URL: [https://xcrm.wa.gov/crmbats/main.aspx](https://xcrm.wa.gov/crmbats/main.aspx)

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

- [https://secureaccess.wa.gov/](https://secureaccess.wa.gov/)
DEMONSTRATION #1

LOGGING INTO BATS AND BASIC NAVIGATION

Watch the instructor demonstrate this functionality
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
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:
- Create request
- Review required elements
- Create analysis
- Monitor & track action items/tasks

Prepare Analysis:
- Prepare analysis for reviewers
- Connect agency contacts & stakeholders

Review Analysis:
- Review analysis
- Edit and format analysis

Submit Request:
- Final review
- Submit agency request to OFM
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
BREAK – RETURN
AT 3:00 PM
PREPARE
ANALYSIS
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
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 PROCESS

1. Analysis completed by preparer
2. Marked READY FOR REVIEW
3. Mark your task complete
4. Sent to first reviewer
5. First reviewer receives email with action required
6. Reviewer selects Analysis Name to review
7. Generates SUMMARY or scrolls through screen
8. Makes any edits needed
9. Returns reviewer to Activities page where they MARK COMPLETE
10. Onto next reviewer until final reviewer is reached
11. The final reviewer then selects COMPLETE on the ANALYSIS page
12. SAVE & CLOSE
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
SUBMIT REQUEST
DEMONSTRATION #5

SUBMIT REQUEST

Watch the instructor demonstrate this functionality
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 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.
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
To get copies of the latest system documentation:


OFM Budget:

• [https://ofm.wa.gov/budget](https://ofm.wa.gov/budget)

Sign up for GovDelivery:

• [https://public.govdelivery.com/accounts/WAGOV/subscriber/new](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:
    o Creating a Fiscal Note in FNS (YouTube)
    o 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?
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?