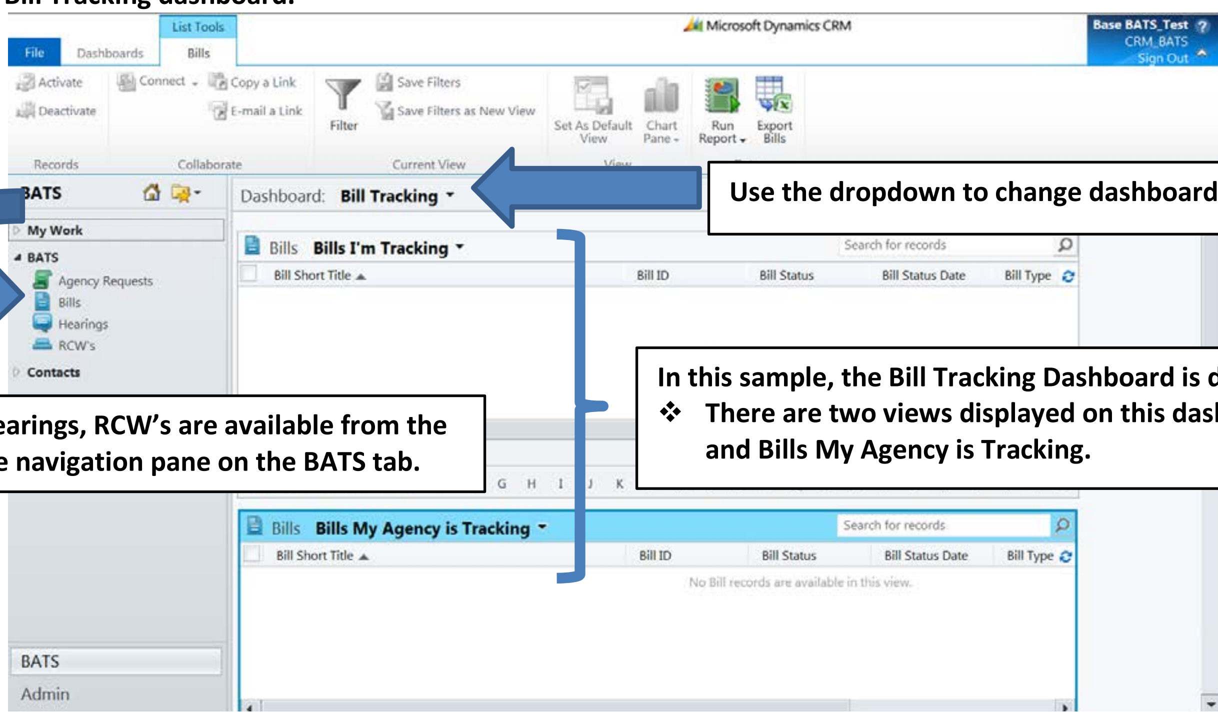
The Bill Analysis and Tracking System (BATS) provides flexible tracking, reporting, and analysis methods from bill origin through the legislative process.

- ❖ Bill-related information is imported (loaded) into BATS from the Legislative Service Center (LSC) database on an hourly basis.
- ❖ Security protocols ensure that individual agencies own and control access to their information.

This document provides an overview of bill tracking functions, including:

- ❖ Bill tracking and activities.
- ❖ Related bills.
- ❖ Legislative details (history, hearings, RCW's, fiscal notes, LSC website).

Sample: Bill Tracking dashboard.



Use the dropdown to change dashboards and/or views if needed.

Bills, Hearings, RCW's are available from the left-side navigation pane on the BATS tab.

In this sample, the Bill Tracking Dashboard is displayed.

- ❖ **There are two views displayed on this dashboard: Bills I'm Tracking and Bills My Agency is Tracking.**

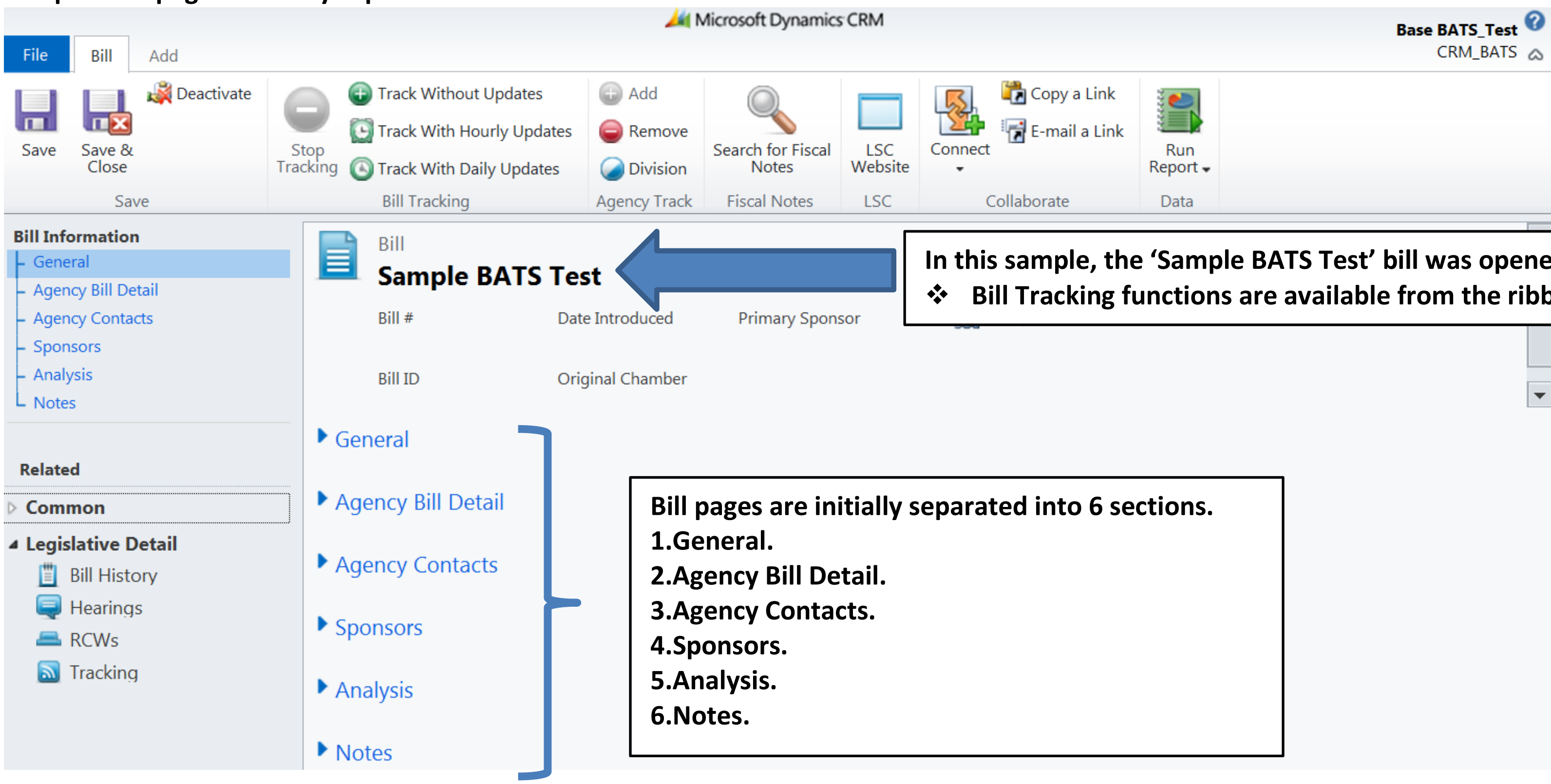
Bill Tracking
Bill-related information is imported (loaded) into BATS from the Legislative Service Center (LSC) database.

Bill Tracking	Process Overview	Additional Info
Tracking for User	Open a bill page (find and select a bill). ❖ Select track without updates. ❖ Select track with daily updates. ❖ Select track with hourly updates. ❖ Select stop tracking.	Starting point for tracking a bill. ❖ Change views if needed. ❖ Select tracking functions from the ribbon.
Tracking for Agency/Division	Open a bill page (find and select a bill). ❖ Select add. ❖ Select remove. ❖ Select division.	Starting point for tracking a bill. ❖ Change views if needed. ❖ Select tracking functions from the ribbon.
Tasks and Activities	Open a bill page (find and select a bill). ❖ Select task and/or activity. ❖ Input information about task and/or activity.	Starting point for managing tasks and activities associated with a bill. ❖ Select tasks and activities from the ribbon.
Related Bills	Open a bill page (find and select a bill). ❖ Select related bills. ❖ Input information about related bills.	Starting point for relating bills for tracking purposes. ❖ Select related bills from the ribbon.
History, Hearings, RCW's	Open a bill page (find and select a bill). ❖ Display history. ❖ Display hearings. ❖ Display RCW's.	Starting point for displaying detailed information about bill history, hearings, RCW's. ❖ Select history, hearings, or RCW's from the left-side navigation pane.
Fiscal Notes and LSC Website	Open a bill page (find and select a bill). ❖ Search Fiscal Notes. ❖ Display LSC Website.	Starting point for displaying fiscal notes or LSC website. ❖ Select search fiscal notes or LSC website link from the ribbon.

Bill Tracking (continued)

Some information about a bill will be greyed-out because it is 'read only' information.

Sample: **Bill page is initially separated into 6 sections.**



In this sample, the 'Sample BATS Test' bill was opened.

- **Bill Tracking functions are available from the ribbon.**

Bill pages are initially separated into 6 sections.

1.General.
2.Agency Bill Detail.
3.Agency Contacts.
4.Sponsors.
5.Analysis.
6.Notes.

Display (View) Bills

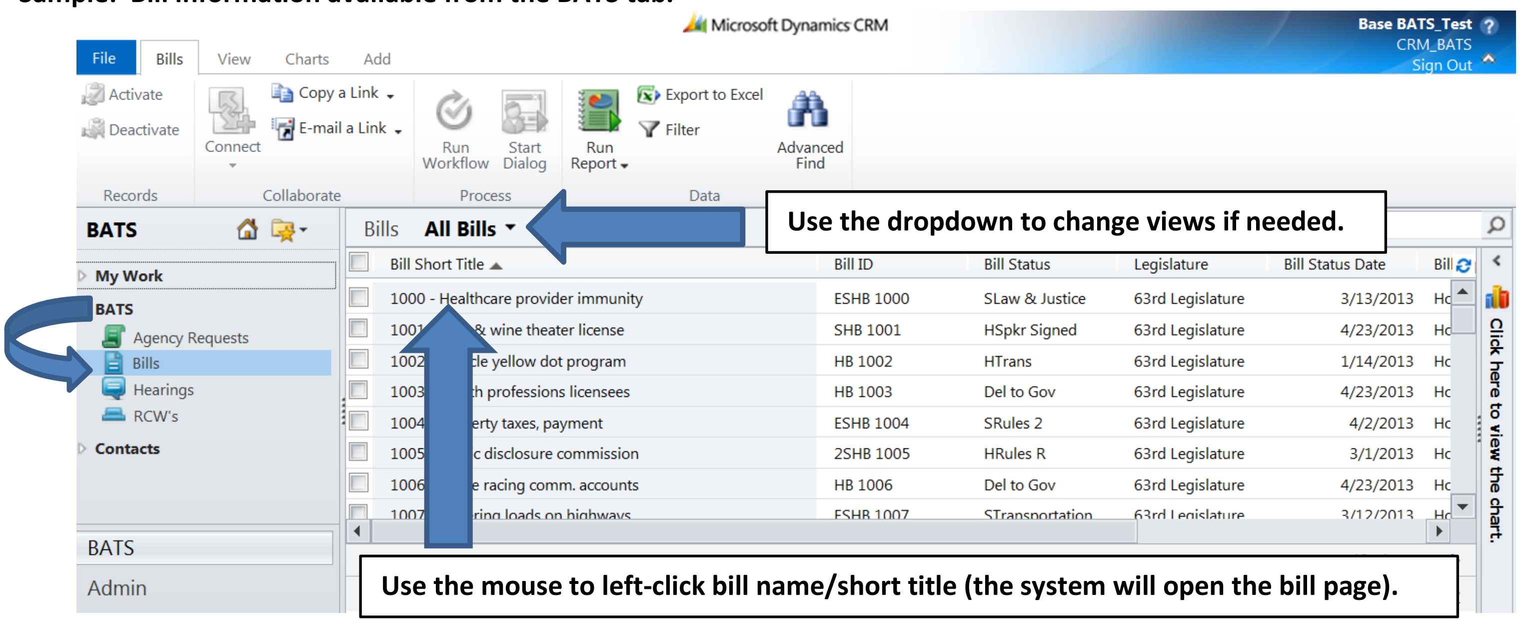
A list of bills is available from the BATS tab in the left side navigation pane and from some of the BATS dashboards.

To access a list of bills from the BATS tab in the left-side navigation pane:

1. **Select:** BATS tab (left side navigation pane).
2. **Select:** BATS (left side navigation pane).
3. **Select:** Bills (left side navigation pane).

☑**Result**: Bill information is displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Bill information available from the BATS tab.



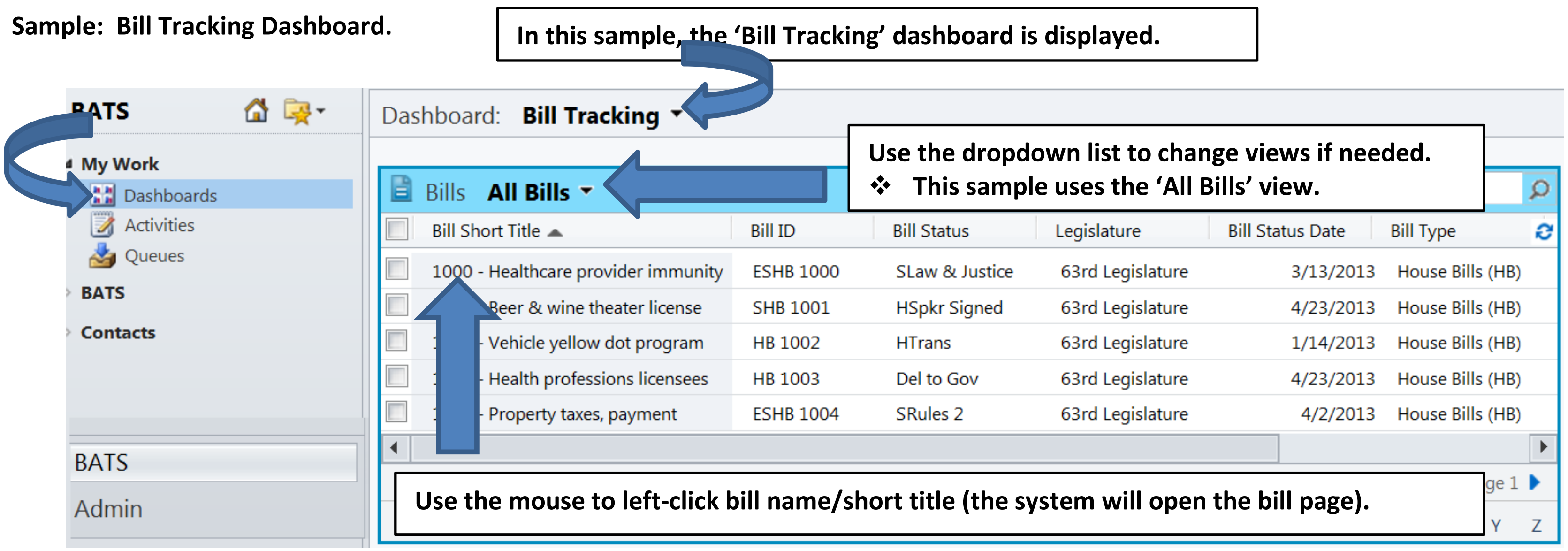
Display (View) Bills (continued)

To display a list of bills from a dashboard.

1. **Select:** BATS tab (left side navigation pane).
2. **Select:** My Work (left side navigation pane).
3. **Select:** Dashboards (left side navigation pane).
4. **Select:** Dashboard. Use the dropdown list to change dashboard view if needed.

☑**Result**: Bill information is displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Bill Tracking Dashboard.



Display (View) Bill Information

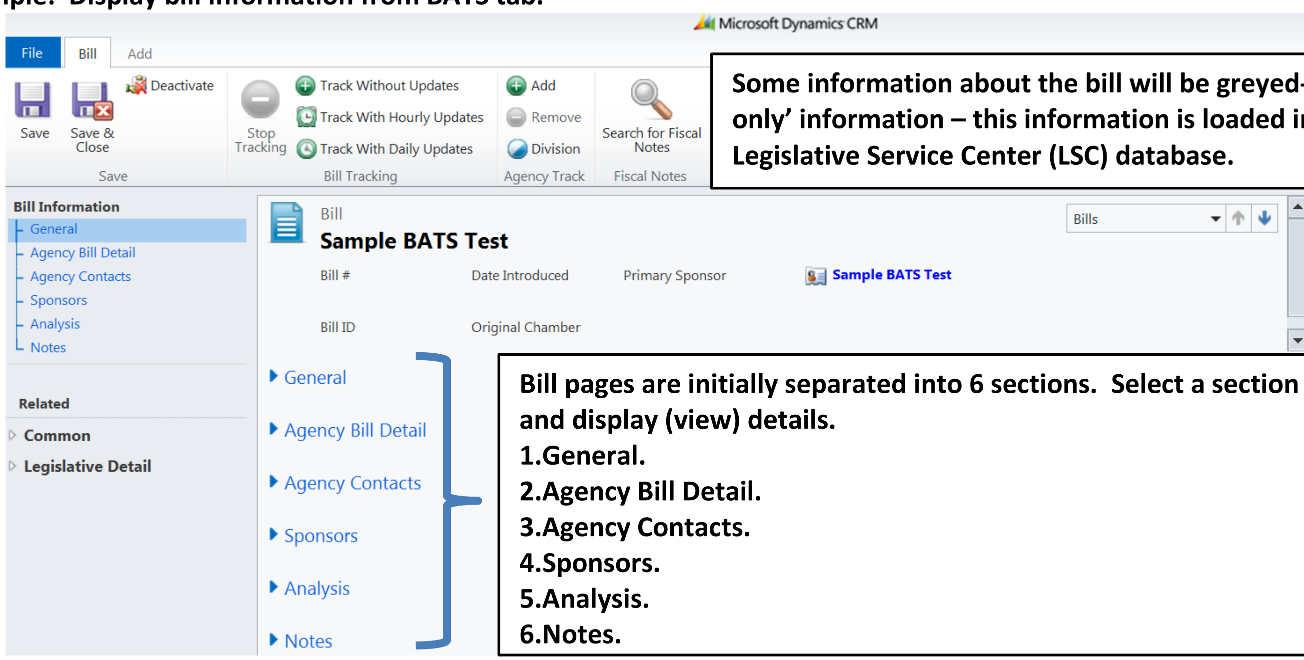
Bill information is available from the BATS tab in the left-side navigation pane.

To display bill information from the BATS tab in the left-side navigation pane:

1. **Select:** BATS tab (left side navigation page).
2. **Select:** BATS (left side navigation pane).
3. **Select:** Bills (left side navigation pane).
4. **Scroll**: To find the bill. Use the dropdown list to change views if needed.
5. **Select**: Bill (left-mouse-click on the bill name/short title). The system will open the bill page.

☑**Result**: Bill information is displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Display bill information from BATS tab.



Some information about the bill will be greyed-out because it is 'read only' information – this information is loaded into BATS from the Legislative Service Center (LSC) database.

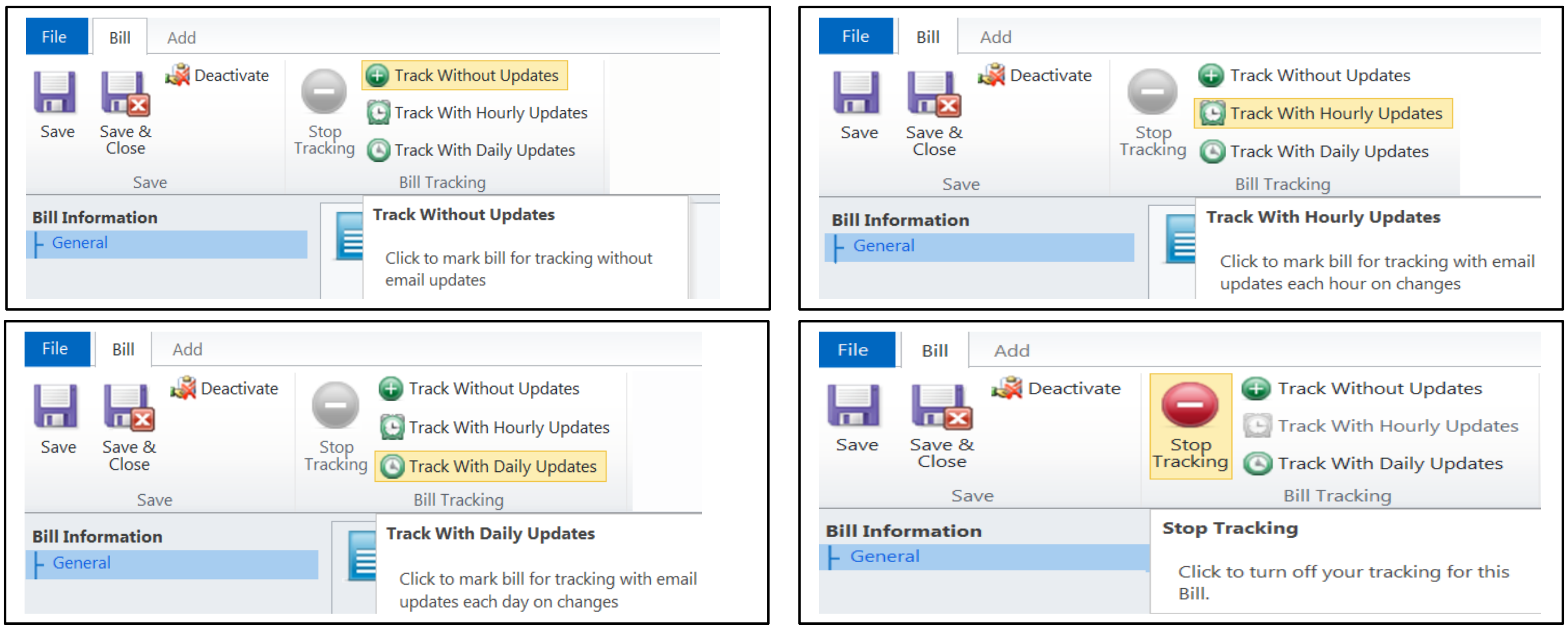
Bill pages are initially separated into 6 sections. Select a section to expand it and display (view) details.
1.General.
2.Agency Bill Detail.
3.Agency Contacts.
4.Sponsors.
5.Analysis.
6.Notes.

Bill Tracking - User

Bill tracking functions are available from the ribbon on the bill page.

Bill Tracking	Description
Track Without Updates	Bill will be tracked for user (system will not send email referencing updates from LSC).
Track With Hourly Updates	Bill will be tracked for user and system will send one email every hour referencing updates from LSC.
Track With Daily Updates	Bill will be tracked for user and system will send one email every day referencing updates from LSC.
Stop Tracking	Bill will not be tracked for user (system will not send email referencing updates from LSC).

Sample: Bill tracking functions available from the ribbon on the bill page.



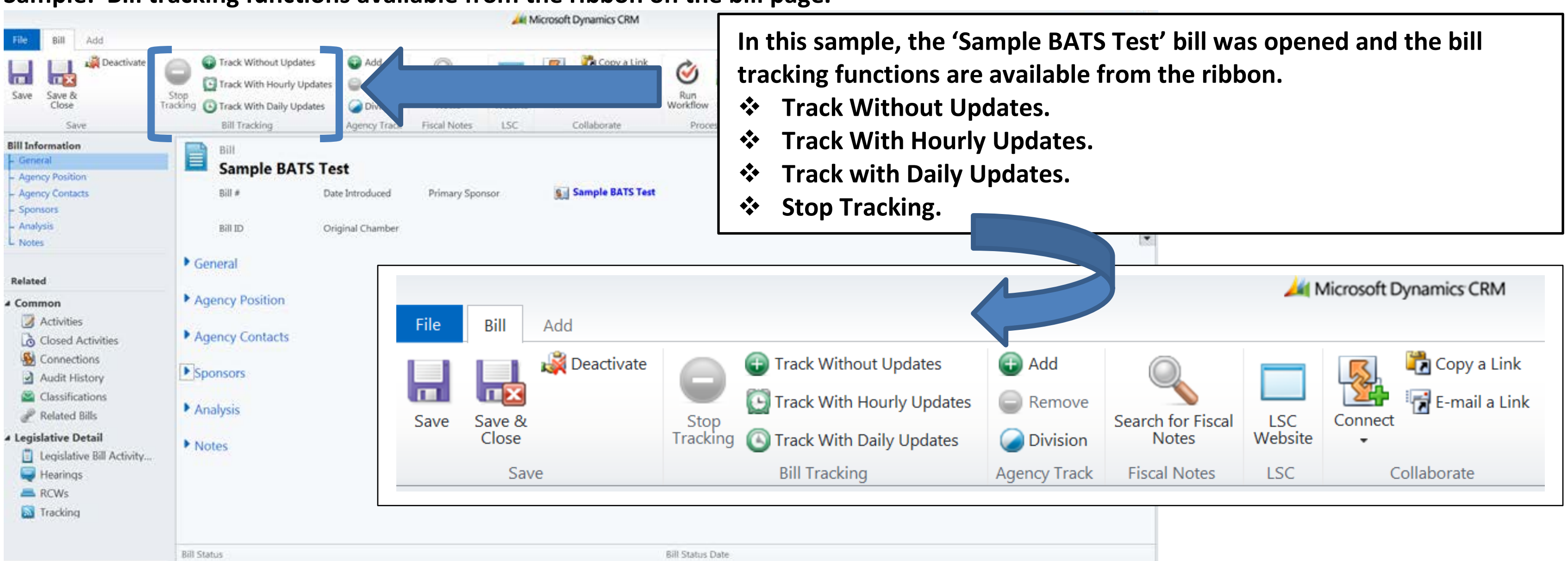
Bill Tracking – User (continued)

To track bills for a user:

1. **Select:** BATS tab (left side navigation page).
2. **Select:** BATS (left side navigation pane).
3. **Select:** Bills (left side navigation pane).
4. **Scroll**: To find the bill (use the dropdown list to change views if needed).
5. **Select**: Bill (left-mouse-click on the bill name/short title). The system will open the bill page.
6. **Select:** Bill tracking function (from the ribbon).

☑**Result**: Bill tracking is updated. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Bill tracking functions available from the ribbon on the bill page.



In this sample, the 'Sample BATS Test' bill was opened and the bill tracking functions are available from the ribbon.

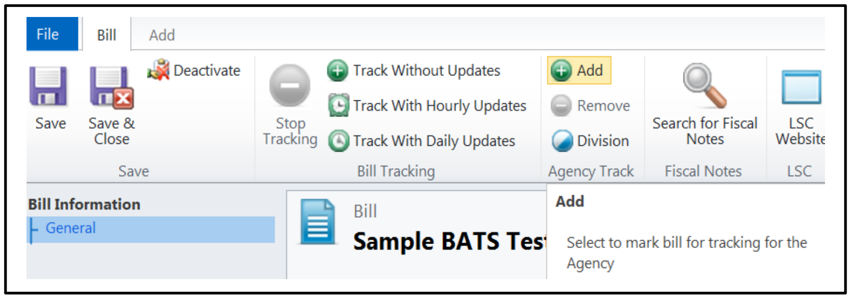
- **Track Without Updates.**
- **Track With Hourly Updates.**
- **Track with Daily Updates.**
- **Stop Tracking.**

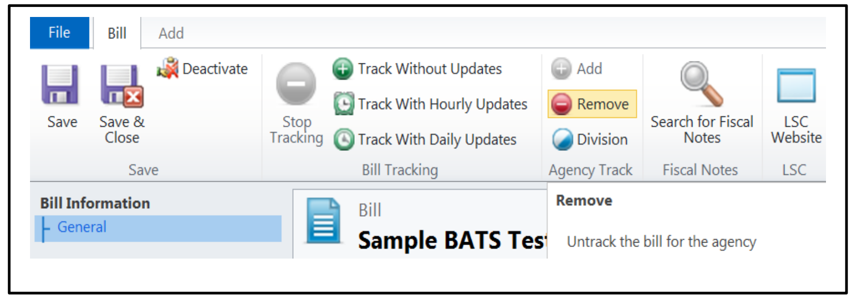
Bill Tracking - Agency/Division

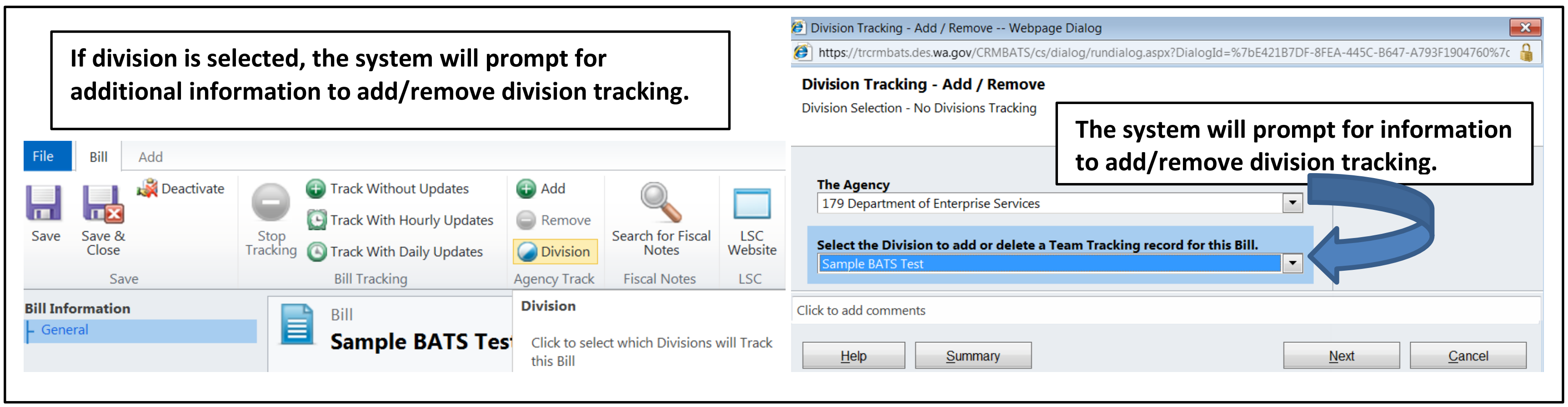
Bill tracking functions are available from the ribbon on the bill page.

Agency Bill Tracking	Description
Add	Bill will be tracked for agency.
Remove	Bill will not be tracked for agency.
Division	Bill may be tracked for one or more divisions. ❖ Add and/or remove division tracking. ❖ The system will prompt for division information.

Sample: Bill tracking functions available from the ribbon on the bill page.







Bill Tracking - Agency/Division (continued)

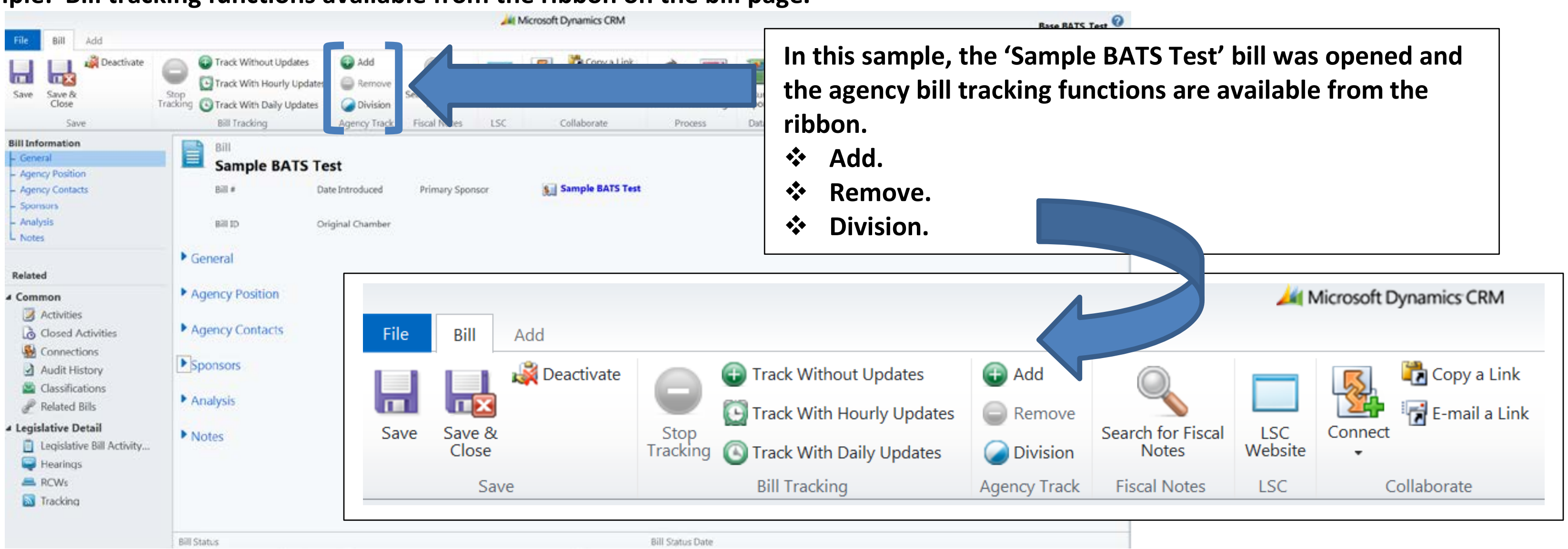
Bill tracking functions are available from the ribbon on the bill page.

To track bills for an agency/division:

1. **Select:** BATS tab (left side navigation page).
2. **Select:** BATS (left side navigation pane).
3. **Select:** Bills (left side navigation pane).
4. **Scroll**: To find the bill (use the dropdown list to change views if needed).
5. **Select**: Bill (left-mouse-click on the bill name/short title). The system will open the bill page.
6. **Select:** Agency track function (from the ribbon).

☑**Result**: Agency bill tracking is updated. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

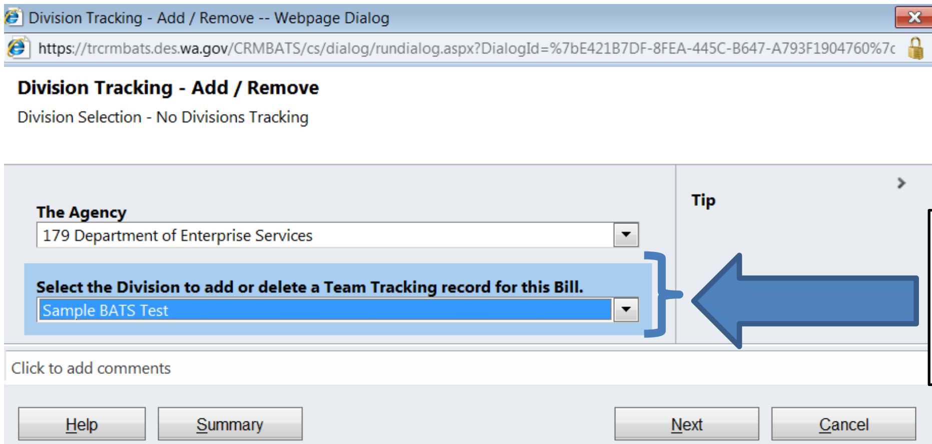
Sample: Bill tracking functions available from the ribbon on the bill page.



Bill Tracking - Agency/Division (continued)

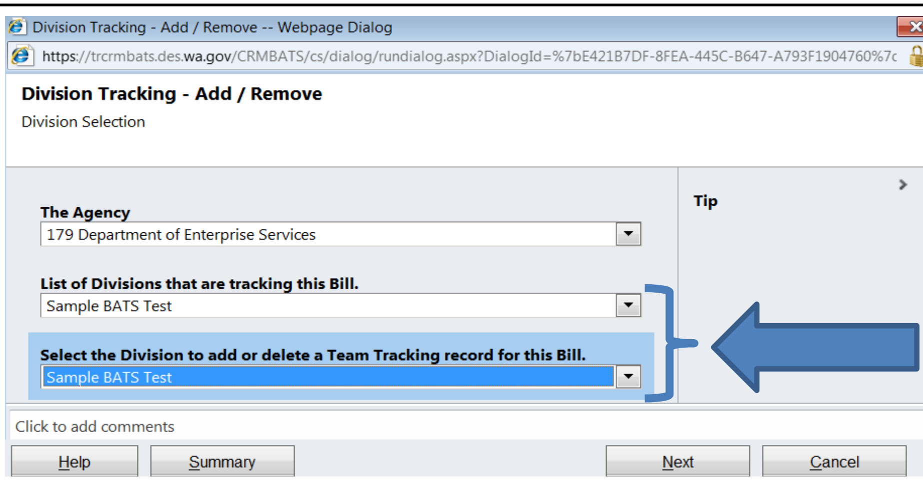
If bill tracking by division is selected, the system will prompt for additional information to add/remove division tracking.

Sample: Bill tracking by division.



In this sample, the 'Sample BATS Test' division is selected from the dropdown values.

- ❖ **The system will prompt for additional division information to add/remove tracking.**



In this sample, the 'Sample BATS Test' division was already added to track the bill. The 'Sample BATS Test' division is selected again to remove (delete) tracking.

- ❖ **A list of divisions currently tracking the bill is displayed. Use the dropdown to display additional divisions.**
- ❖ **A list of divisions that may be selected to track the bill and/or remove bill tracking is displayed. Use the dropdown to display additional divisions.**
- ❖ **The system will prompt for additional division information to add/remove tracking.**

Assign Tasks and Activities for Bills

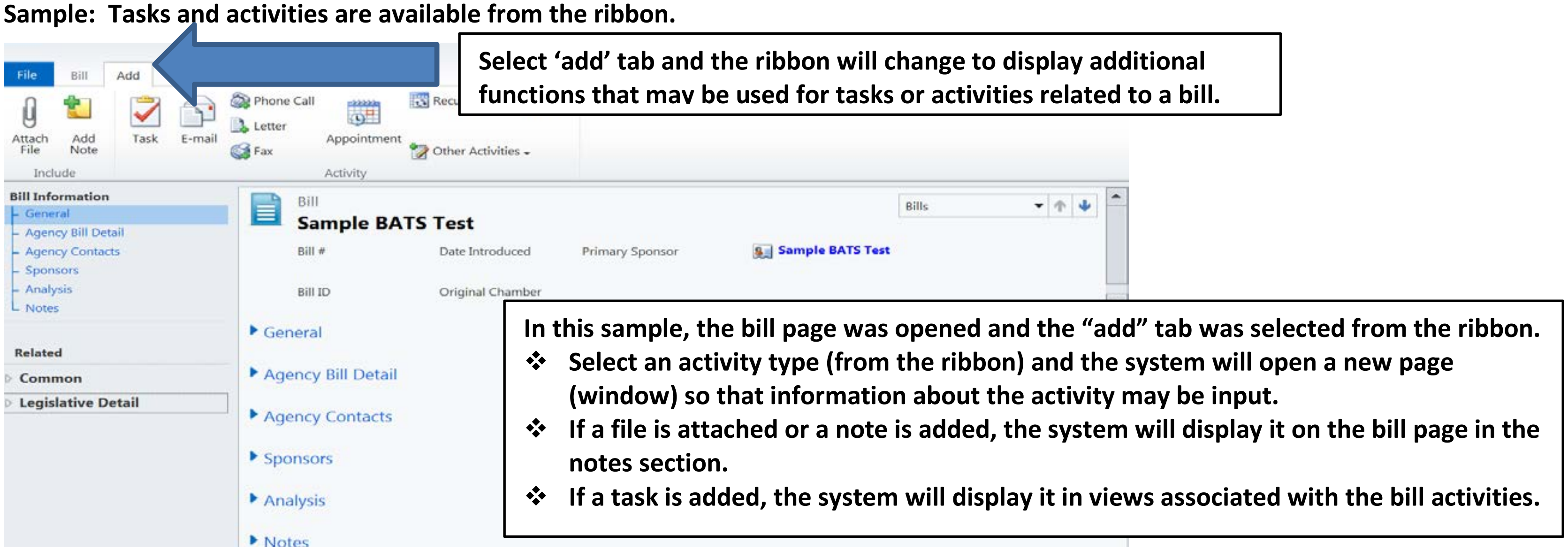
Activities may be used to create or manage actions (tasks or assignments) such as notes, e-mail, phone call, letter, fax, or appointment.

To add a task or activity from a bill page:

1. **Select**: Bill (left-mouse-click on the bill name/short title). The system will open the bill page.
2. **Select:** Add (from the ribbon). Note: this is the 'add' tab on top of the ribbon. The ribbon will display additional functions that may be used to add tasks, notes, attachments, and/or assignments to the bill.
3. **Select:** Activity type (from the ribbon). Activity types may include attach file, add note, tasks, email, phone call, letter, fax, or appointment. The system will open a new page (window) so that information about the activity may be input.
4. **Input:** Information about the activity.
5. **Select:** Save.

☑**Result**: The activity is saved and associated with the bill. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Tasks and activities are available from the ribbon.

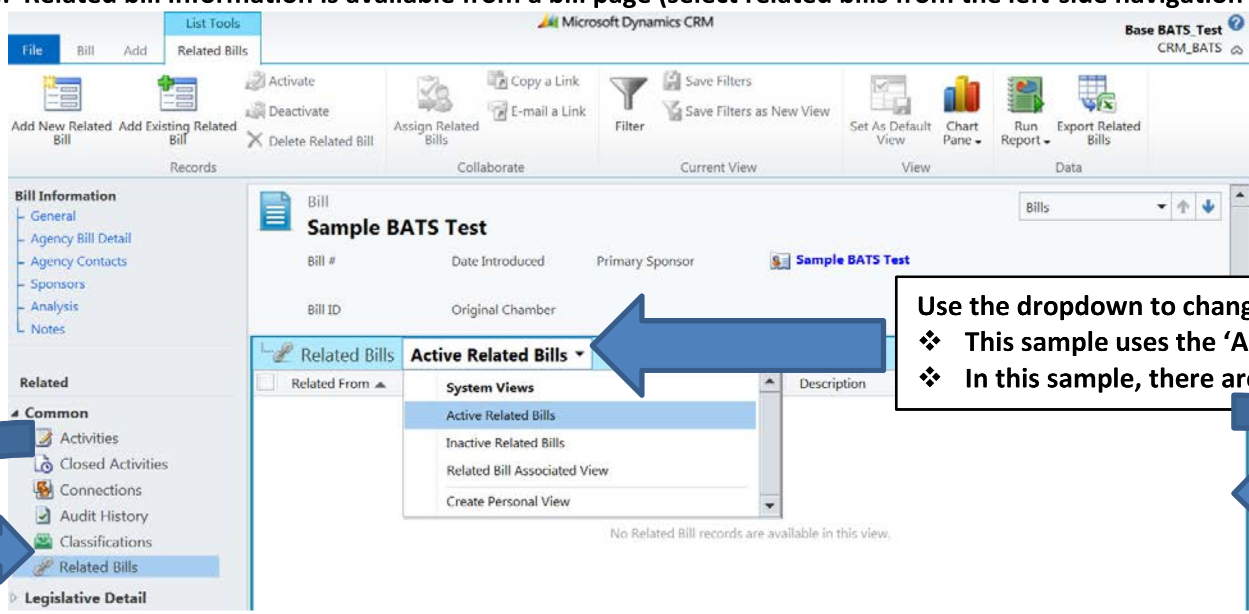


Bill Tracking – Related Bills
Bills may be related to other bills on the bill page.

To relate a bill to another bill:
1. **Select:** BATS tab (left side navigation page).
2. **Select:** BATS (left side navigation pane).
3. **Select:** Bills (left side navigation pane).
4. **Scroll**: To find the bill. Use the dropdown list to change views if needed.
5. **Select**: Bill (left-mouse-click on the bill name/short title). The system will open the bill page.
6. **Select:** Related Bills (left-side navigation pane).

☑**Result**: Related bill information is displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error. ➔**Note:** Additional steps are needed to relate bills.

Sample: Related bill information is available from a bill page (select related bills from the left-side navigation pane).



Use the dropdown to change views if needed.
- ❖ **This sample uses the 'Active Related Bills' view.**
- ❖ **In this sample, there are no related bills.**

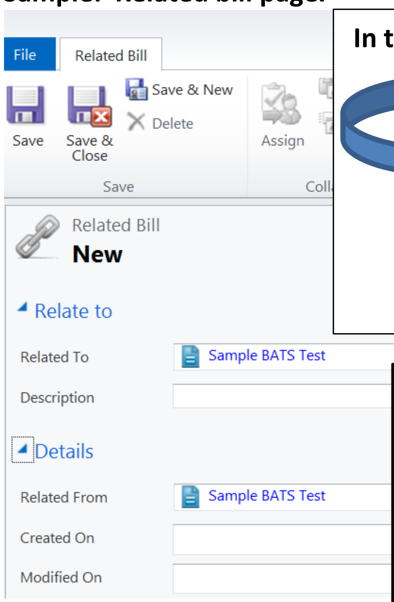
Bill Tracking – Related Bills (continued)

To continue steps needed to relate a bill to another bill:

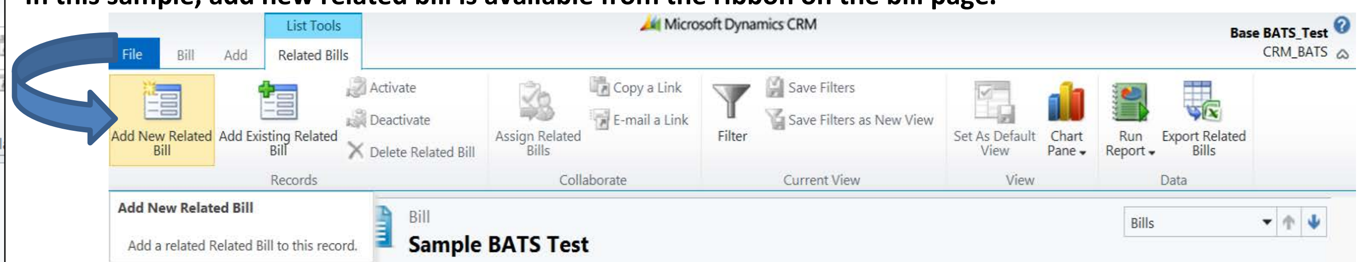
1. **Select:** Add New Related Bill (from the ribbon). The system will open the related bill page.
2. **Input:** Related bill information.
3. **Select:** Save.

☑**Result**: Related bill information is updated. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Related bill page.



In this sample, add new related bill is available from the ribbon on the bill page.



Note: In the training environment, the ribbon displays additional functions. Technical staff are currently working on this functionality.

- ❖ *Add Existing Related Bill: technical staff are planning to remove this function (not needed).*
- ❖ *Activate: this may be used to activate a bill relation if it has been deactivated.*
- ❖ *Deactivate: this may be used to activate a bill relation if it has been deactivated.*
- ❖ *Delete Related Bill: this may be used to delete a bill relation (this does not delete a bill – it deletes the bill relation).*

Display (View) Bill History

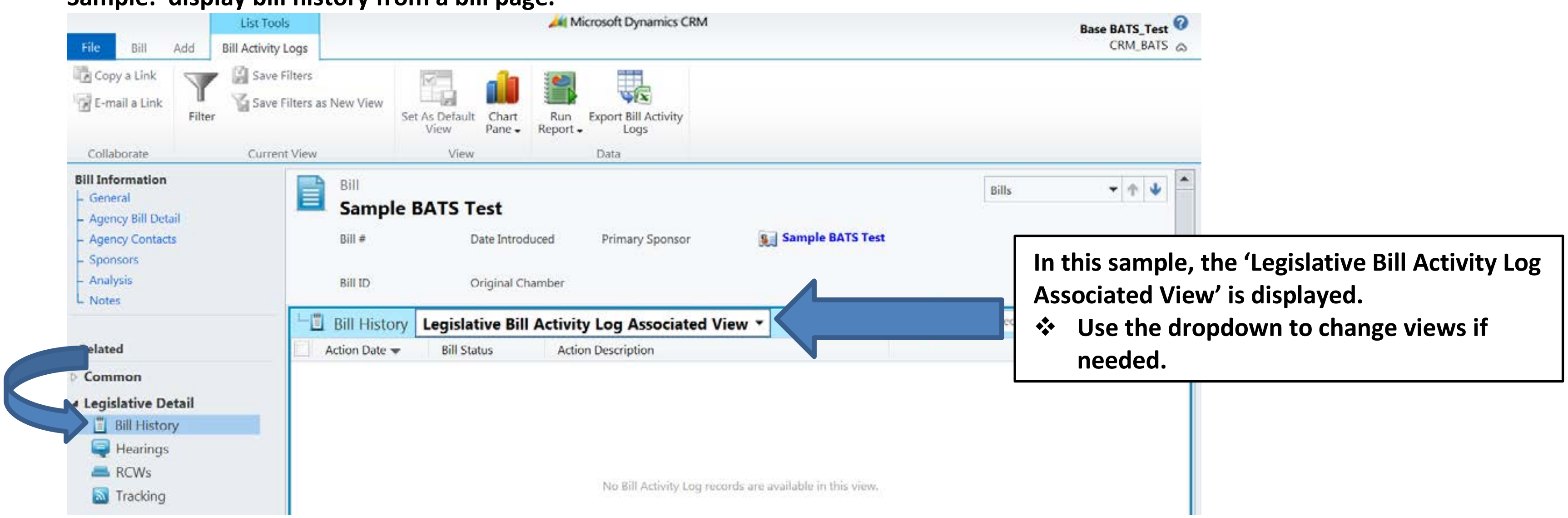
Bill history is available from a bill page.

To display bill history from a bill page:

1. **Select:** BATS tab (left side navigation page).
2. **Select:** BATS (left side navigation pane).
3. **Select:** Bills (left side navigation pane).
4. **Scroll**: To find the bill. Use the dropdown list to change views if needed.
5. **Select**: Bill (left-mouse-click on the bill name/short title). The system will open the bill page.
6. **Select**: Bill History (left-side navigation pane).

☑**Result**: Bill history is displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: display bill history from a bill page.



Display (View) Bill Hearings

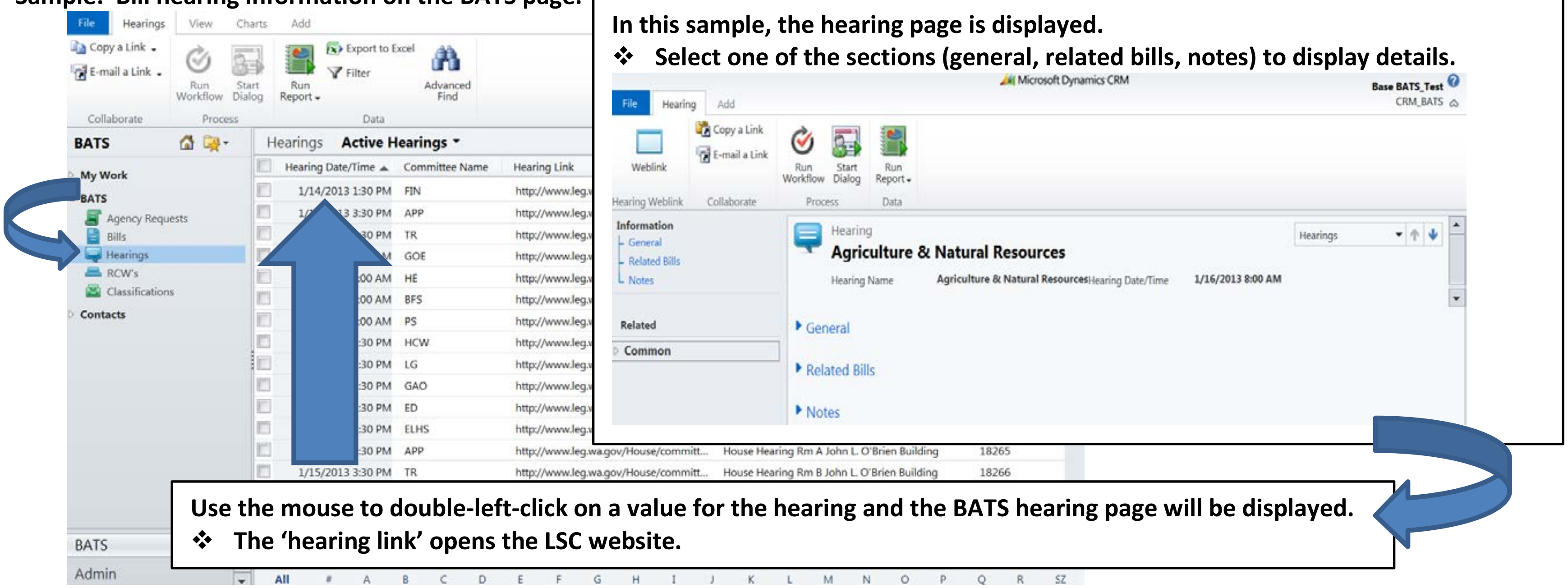
Bill hearing information is available from the BATS tab in the left-side navigation pane.

To view (display) hearing information:

1. **Select:** BATS tab (left side navigation page).
2. **Select:** BATS (left side navigation pane).
3. **Select:** Hearings (left side navigation pane).
4. **Scroll**: To find the hearing. Use the dropdown list to change views if needed.
5. **Select**: Hearing (left-mouse-click on one of the values for the hearing).

☑**Result**: Hearing page is displayed with details about the hearing. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Bill hearing information on the BATS page.



In this sample, the hearing page is displayed.

❖ **Select one of the sections (general, related bills, notes) to display details.**

Use the mouse to double-left-click on a value for the hearing and the BATS hearing page will be displayed.

❖ **The 'hearing link' opens the LSC website.**

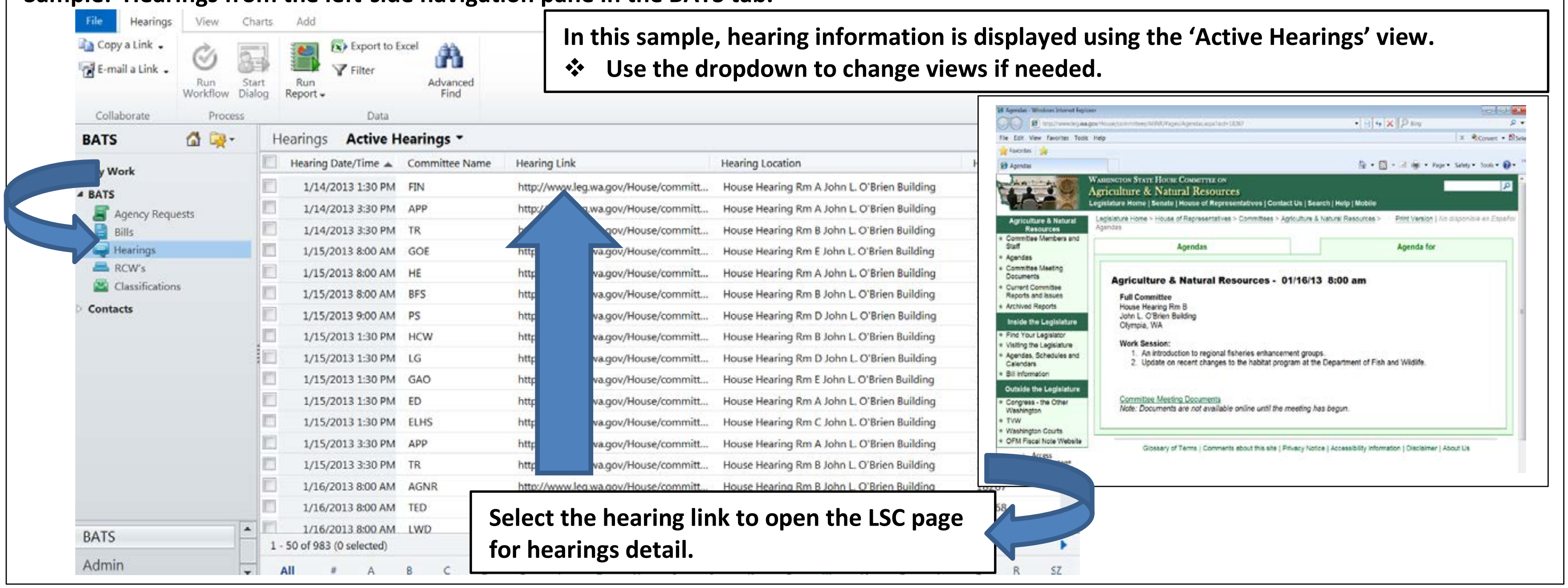
Display (View) Bill Hearings (continued)

To display bill hearing information on the LSC website:

1. **Select:** BATS tab (left side navigation pane).
2. **Select:** BATS (left side navigation pane).
3. **Select:** Hearings (left side navigation pane).
4. **Scroll**: To find the hearing. Use the dropdown list to change views if needed.
5. **Select:** Hearing link. The system will open the LSC website.

☑**Result**: Hearing information on the LSC website is displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Hearings from the left-side navigation pane in the BATS tab.



Display (View) RCW's

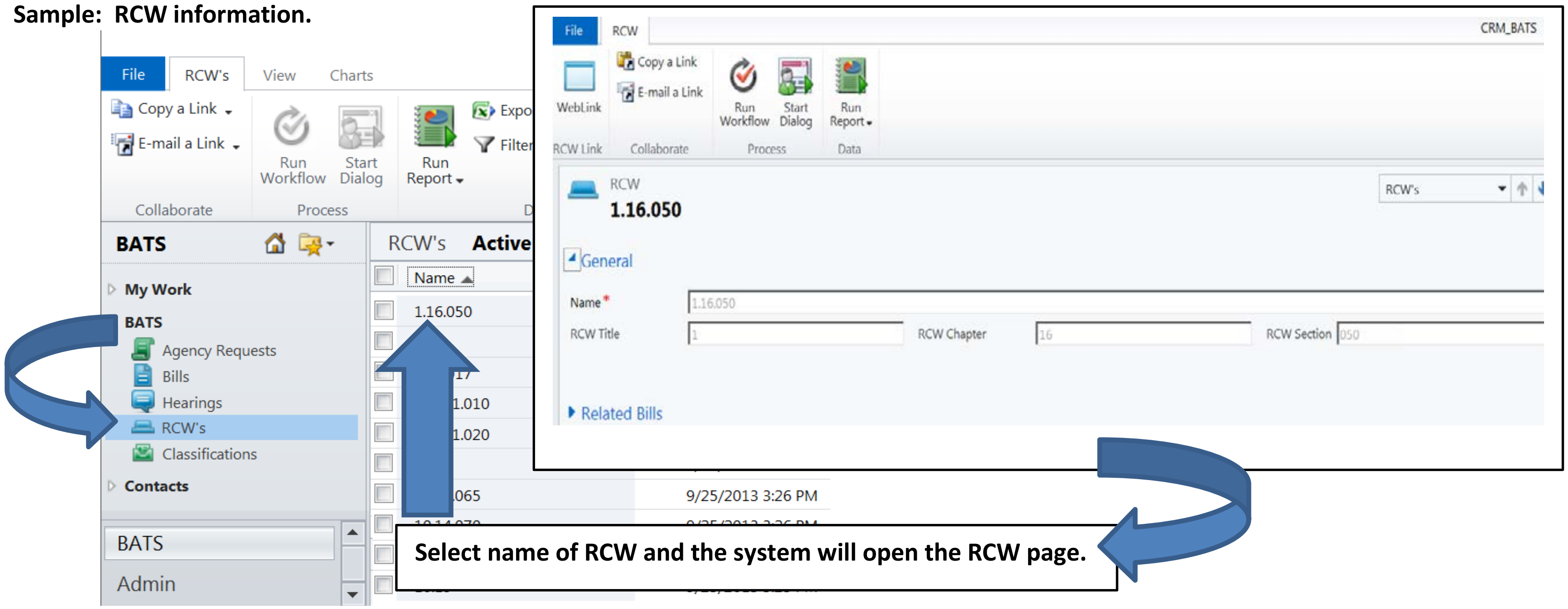
Revised Code of Washington (RCW) information is available from the BATS tab in the left-side navigation pane.

To view (display) RCW information:

1. **Select:** BATS tab (left side navigation page).
2. **Select:** BATS (left side navigation pane).
3. **Select:** RCW's (left side navigation pane).
4. **Scroll**: To find the RCW. Use the dropdown list to change views if needed.
5. **Select**: Name of RCW (left-mouse-click on the RCW number).

☑**Result**: RCW page is displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: RCW information.



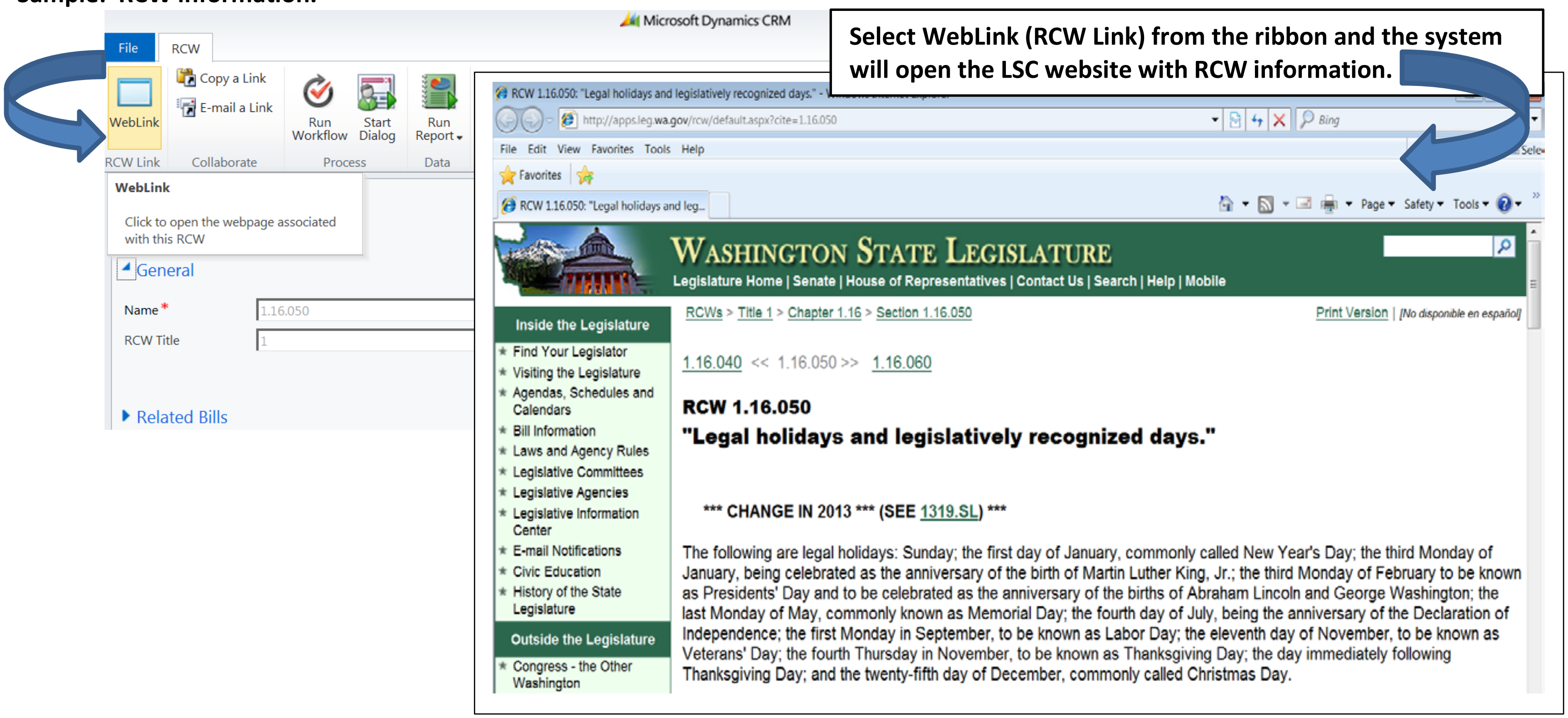
Display (View) RCW's (continued)

To view (display) additional RCW information:

1. **Select:** WebLink (from ribbon).

☑**Result**: RCW information on the LSC website is displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: RCW information.



Display (View) Bill Fiscal Notes

Fiscal note information is available from a bill page.

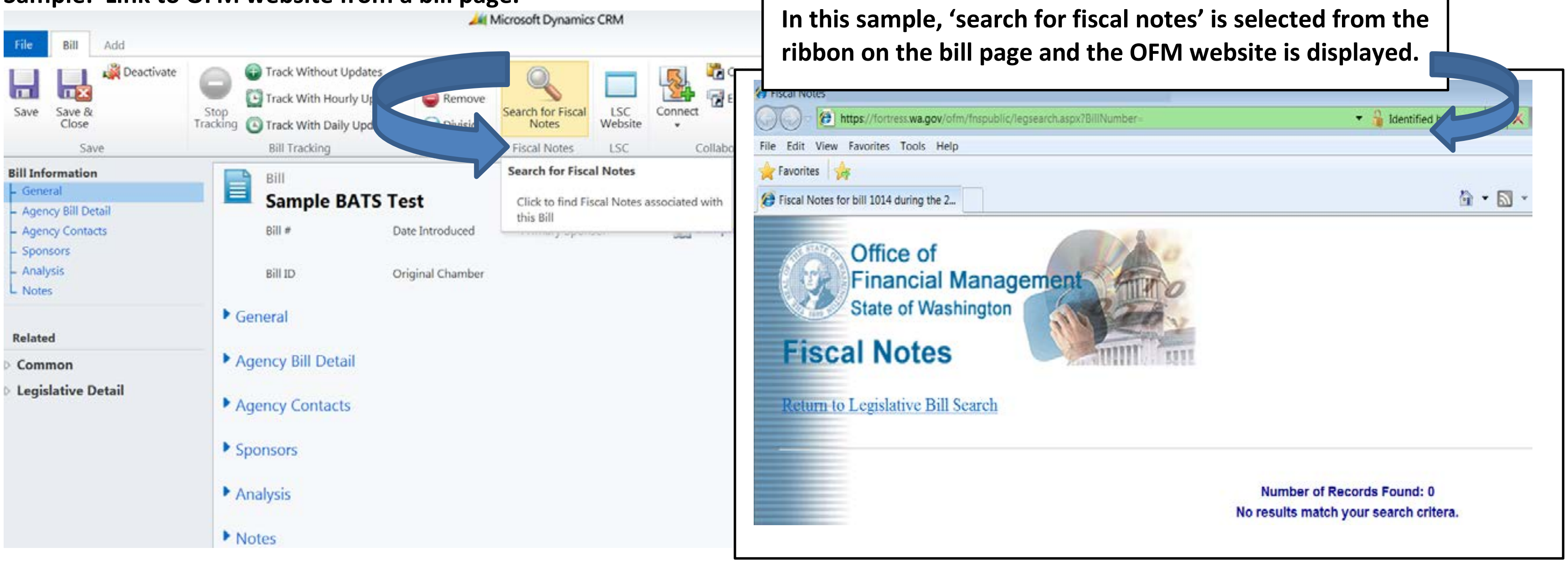
To view (display) fiscal note information:

1. **Select:** BATS tab (left side navigation page).
2. **Select:** BATS (left side navigation pane).
3. **Select:** Bills (left side navigation pane).
4. **Scroll**: To find the bill. Use the dropdown list to change views if needed.
5. **Select**: Bill (left-mouse-click on the bill name/short title). The system will open the bill page.
6. **Select**: Search for Fiscal Notes (from the ribbon).

☑**Result**: Fiscal note information on the OFM website is displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Link to OFM website from a bill page.

In this sample, 'search for fiscal notes' is selected from the ribbon on the bill page and the OFM website is displayed.



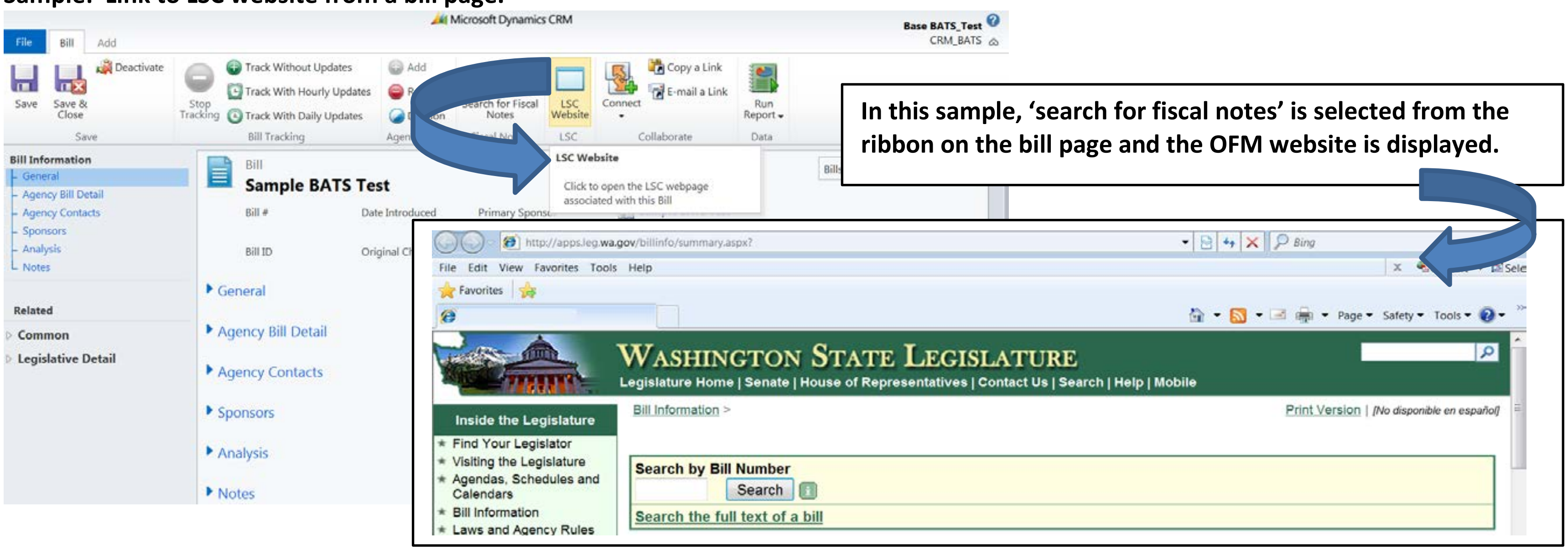
Display (View) Legislative Service Center (LSC)
LSC information is available from a bill page.

To view (display) LSC information:

1. **Select:** BATS tab (left side navigation page).
2. **Select:** BATS (left side navigation pane).
3. **Select:** Bills (left side navigation pane).
4. **Scroll**: To find the bill. Use the dropdown list to change views if needed.
5. **Select**: Bill (left-mouse-click on the bill name/short title). The system will open the bill page.
6. **Select**: LSC Website (from the ribbon).

☑**Result**: LSC website is displayed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Link to LSC website from a bill page.



In this sample, 'search for fiscal notes' is selected from the ribbon on the bill page and the OFM website is displayed.

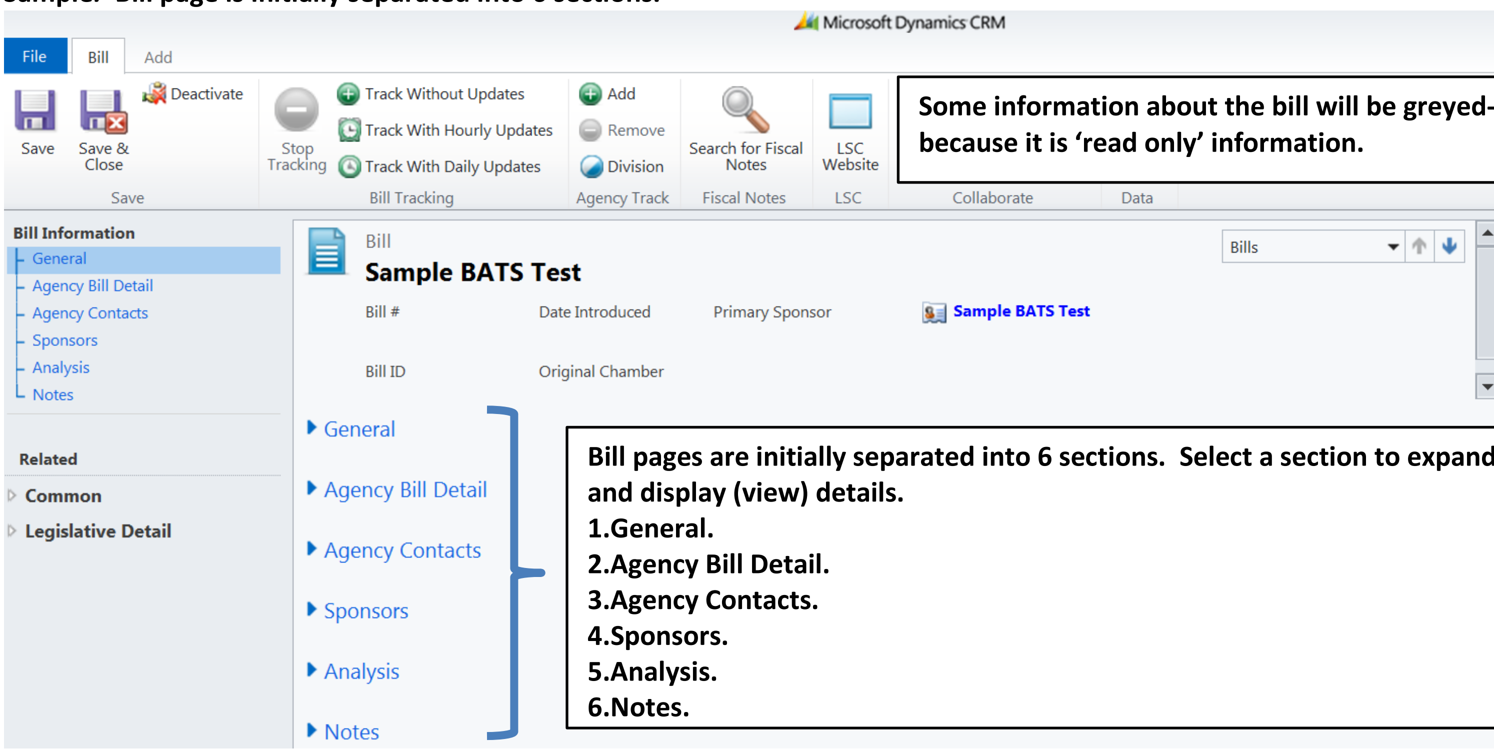
The Bill Analysis and Tracking System (BATS) provides flexible tracking, reporting, and analysis methods from bill origin through the legislative process.

- Security protocols ensure that individual agencies own and control access to their information.

This document provides an overview of bill analysis and review functions, including:

- Prepare bill analysis.
- Provide bill analysis details.
- Review bill analysis details.
- Complete bill analysis.

Sample*:* Bill page is initially separated into 6 sections.



Some information about the bill will be greyed-out because it is 'read only' information.

Bill pages are initially separated into 6 sections. Select a section to expand it and display (view) details.
1.General.
2.Agency Bill Detail.
3.Agency Contacts.
4.Sponsors.
5.Analysis.
6.Notes.

Bill Tracking – Analysis and Review

The ability to manage agency bill analysis and review is based on user roles and security protocols. This helps to ensure that individual agencies own and control access to their information.

- ❖ Information provided by an agency on the bill page (including agency detailed analysis) is for internal agency use. This information is not available to other agencies unless the agency uses the 'share' function in BATS.

Bill Analysis and Review	Process Overview	Additional Info
Prepare Bill Analysis	Open a bill page (find and select a bill). ❖ Add agency bill detail (agency short title and priority). ❖ Connect agency contacts and sponsors.	Starting point for preparing agency analysis. ❖ This information is input on the bill page.
Prepare Bill Analysis Details	Open analysis page on a bill (find and select a bill and open the analysis section). ❖ Add new analysis. ❖ Assign preparer for analysis. ❖ Assign reviewers for analysis.	Starting point for preparing analysis details. ❖ The analysis section on the bill page is used to add an analysis page (this analysis page will be used to provide analysis details and reviewer tasks).
Provide Bill Analysis Details	Open analysis page on a bill (find and select a bill and open the analysis section). ❖ Select 'start analysis' to input new analysis detail. ❖ Edit and format analysis information. ❖ Add notes. ❖ Update review task details. ❖ Select 'ready for review'.	Starting point for providing analysis details. ❖ When 'start analysis' is selected, the system prompts for information using a question/answer format. This provides an easy way to provide new analysis details. ❖ After the analysis is input, it may be edited/formatted if needed.
Review Bill Analysis Details	Open analysis page on a bill (find and select a bill and open the analysis section). ❖ Select 'generate summary'. ❖ Review analysis. ❖ Update analysis (if needed). ❖ Select 'mark complete' (reviewer task status).	Starting point for reviewing analysis details. ❖ After the analysis details are reviewed, they may be edited/formatted if needed. ❖ When reviewer tasks are 'marked complete', items in the queue and activity lists (views) will be updated.
Complete Bill Analysis	Open a bill page (find and select a bill). ❖ Select 'complete' (all reviews complete). ❖ Add notes. ❖ Add agency bill detail (agency position).	Starting point for completing agency analysis. ❖ This information is input on the bill page.

Prepare Bill Analysis –General Information

The ability to prepare agency bill analysis is based on user roles and security protocols. This helps to ensure that individual agencies own and control access to their information.

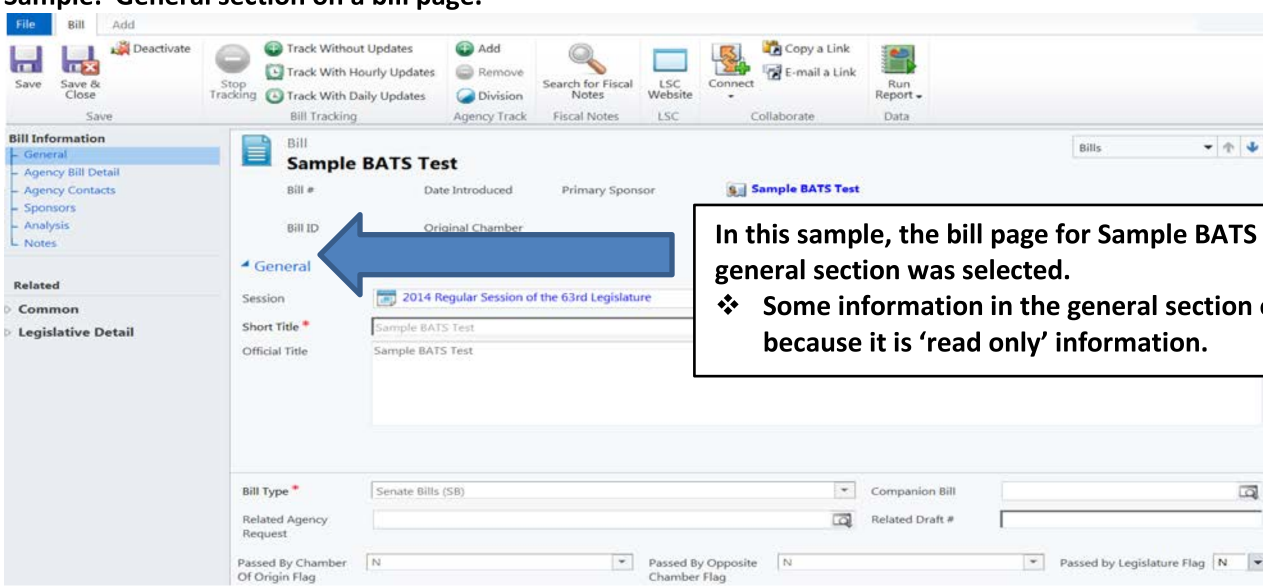
❖ Some information in the general section of a bill will be greyed-out because it is 'read only' information.

To display (view) general information about a bill:

1. **Select:** Bills (left side navigation pane).
2. **Scroll**: To find the bill (use the dropdown list to change views if needed).
3. **Select**: Name/Short Title of bill (left-mouse-click on the bill name/short title). The system will open the bill page.
4. **Select**: General section on the bill page.

☑**Result**: General section is opened. An error message will be displayed if the action is not allowed due to security permissions or system error.

Sample: General section on a bill page.



In this sample, the bill page for Sample BATS Test was opened and the general section was selected.

❖ **Some information in the general section of a bill will be greyed-out because it is 'read only' information.**

Prepare Bill Analysis – Agency Bill Details

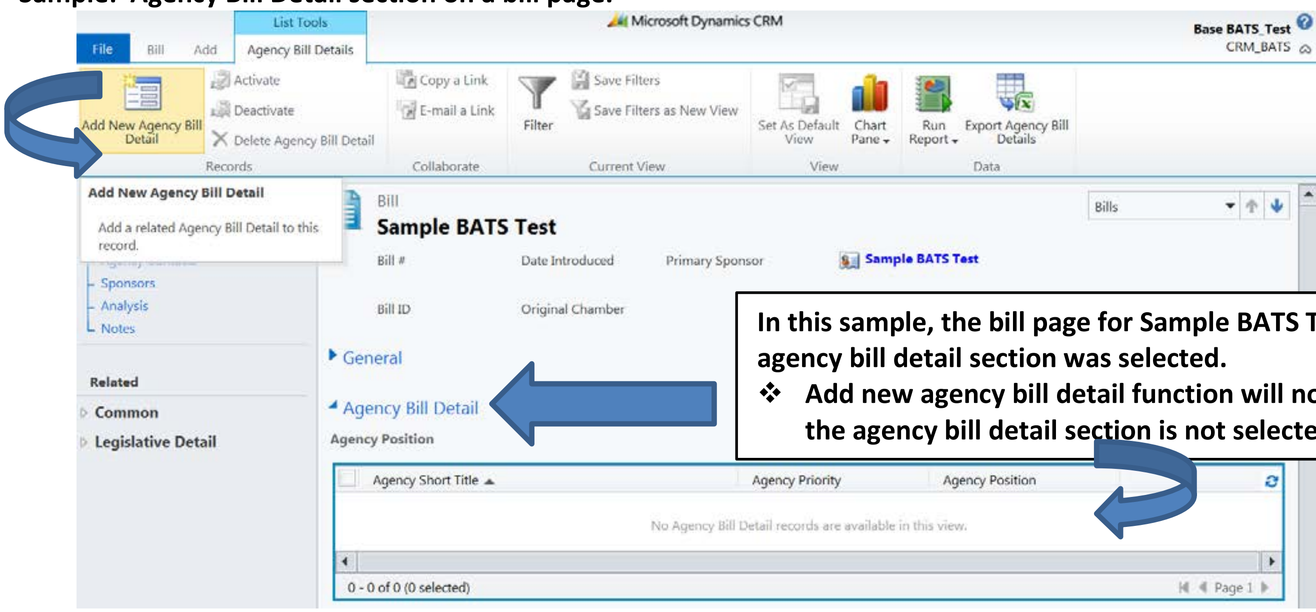
Agency bill details (including agency short title and priority) may be added to a bill.

To add agency bill details to a bill page:

1. **Select:** Bills (left side navigation pane).
2. **Scroll**: To find the bill (use the dropdown list to change views if needed).
3. **Select**: Name/Short Title of bill (left-mouse-click on the bill name/short title). The system will open the bill page.
4. **Select**: Agency Bill Detail section on the bill page.
5. **Select**: Add New Agency Bill Detail (from the ribbon).

☑**Result**: The system will open agency bill detail page. An error message will be displayed if the action is not allowed due to security permissions or system error. ➔**Note:** Additional steps are needed to add agency bill details.

Sample: Agency Bill Detail section on a bill page.



In this sample, the bill page for Sample BATS Test was opened and the agency bill detail section was selected.

❖ **Add new agency bill detail function will not be displayed on the ribbon if the agency bill detail section is not selected.**

Prepare Bill Analysis – Agency Bill Details (continued)

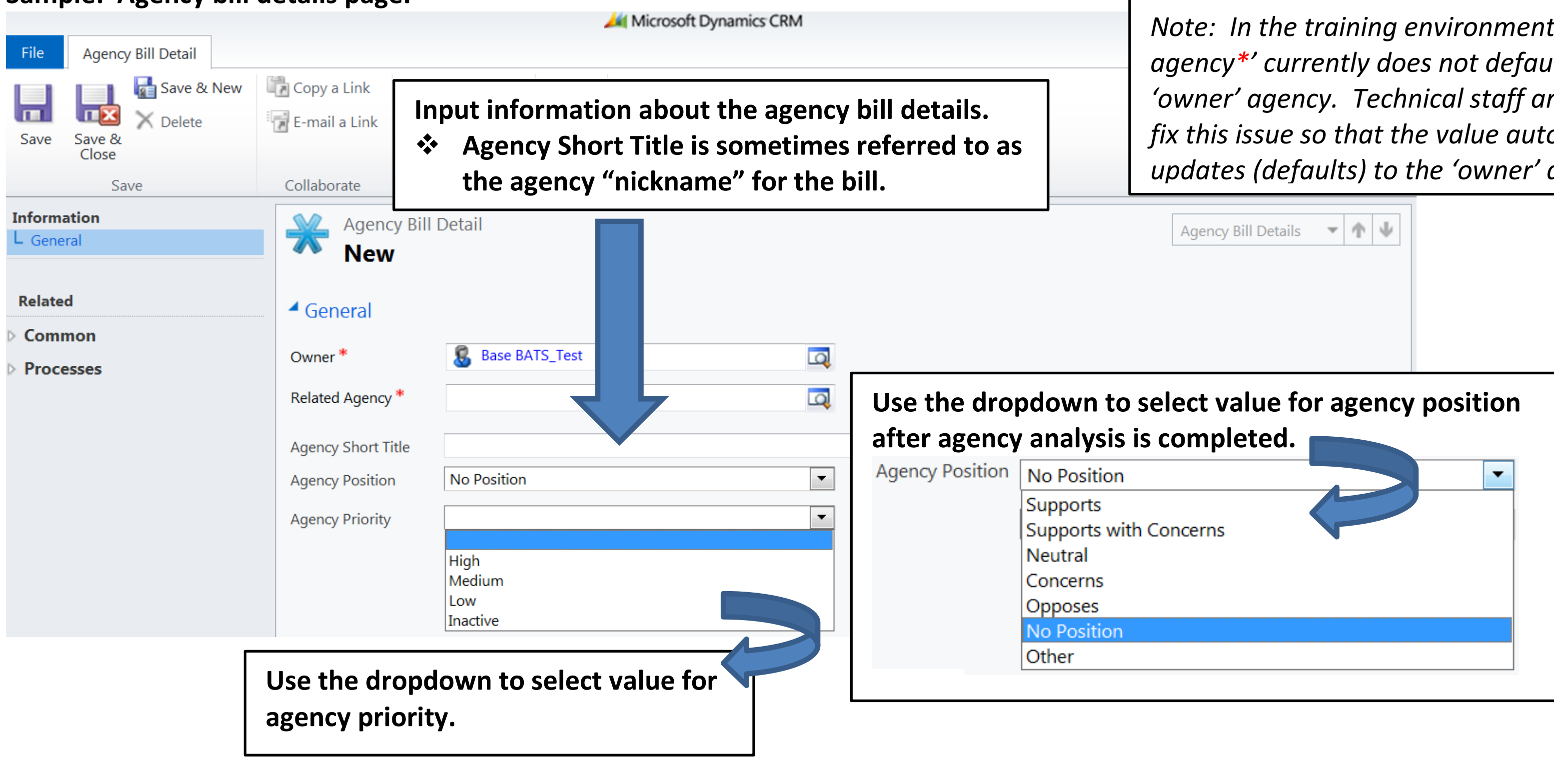
To continue steps needed to add agency bill details:

1. **Input:** Information about the agency bill details. Required fields are marked with *. Use Look Up to search for values.
2. **Select:** Save.

☑**Result**: Agency Bill Detail section is updated. An error message will be displayed if the action is not allowed due to security permissions or system error.

Sample: Agency bill details page.

Note: In the training environment, 'related agency' currently does not default to the 'owner' agency. Technical staff are working to fix this issue so that the value automatically updates (defaults) to the 'owner' agency.*



Input information about the agency bill details.

- **Agency Short Title is sometimes referred to as the agency "nickname" for the bill.**

Use the dropdown to select value for agency position after agency analysis is completed.

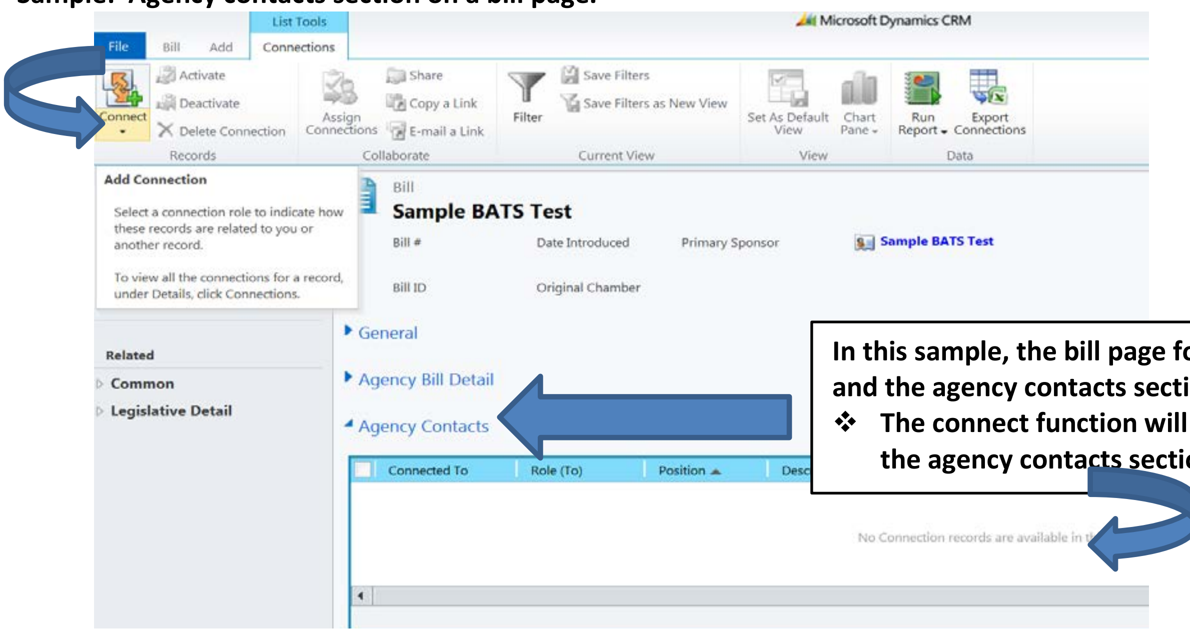
Use the dropdown to select value for agency priority.

Prepare Bill Analysis - Connect Agency Contacts
Contacts may be associated (connected) with a bill for agency analysis.

To connect contacts to a bill for agency analysis:
1. **Select:** Bills (left side navigation pane).
2. **Scroll**: To find the bill (use the dropdown list to change view if needed).
3. **Select**: Name/Short Title of bill (left-mouse-click on the bill name/short title). The system will open the bill page.
4. **Select:** Agency Contacts section on the bill page.
5. **Select:** Connect (from the ribbon). The connect function will not be displayed on the ribbon if the agency contacts section is not selected.

☑**Result**: The system will open connect contacts page. An error message will be displayed if the action is not allowed due to security permissions or system validation error. ➔**Note:** Additional steps are needed to connect agency contacts.

Sample: Agency contacts section on a bill page.



In this sample, the bill page for Sample BATS Test was opened and the agency contacts section was selected.

❖ **The connect function will not be displayed on the ribbon if the agency contacts section is not selected.**

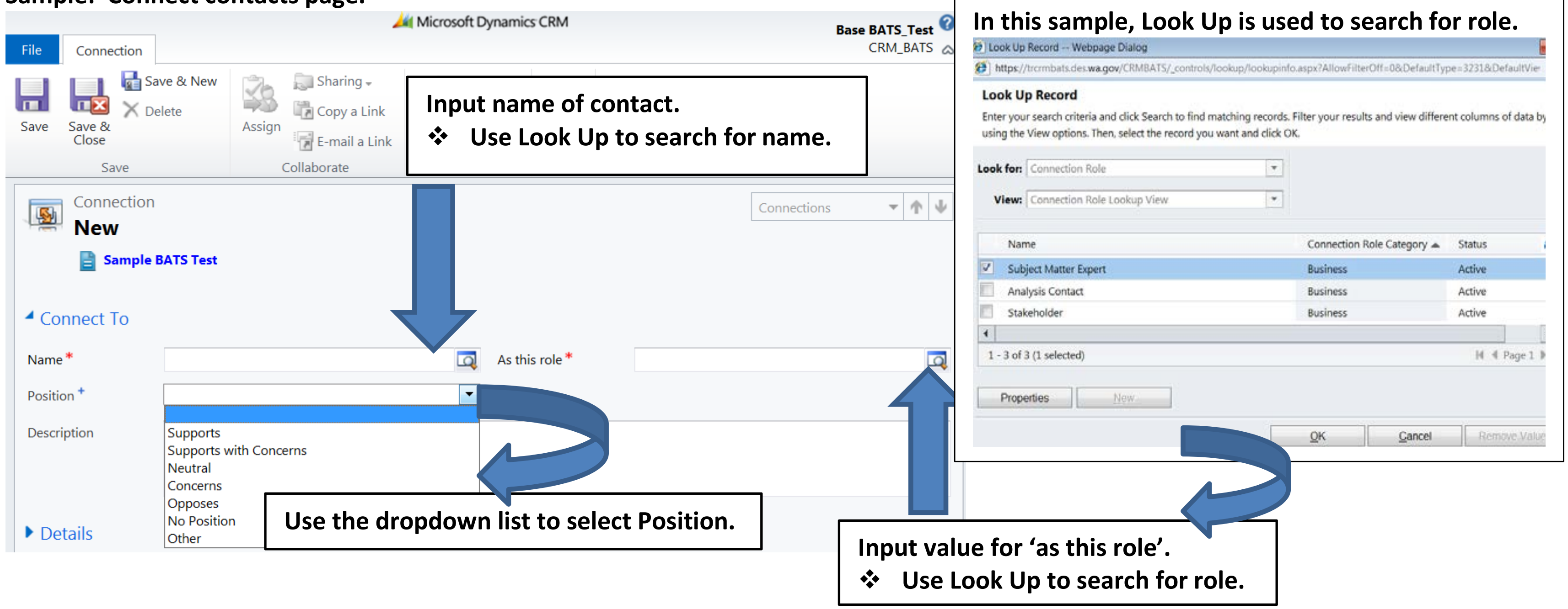
Prepare Bill Analysis - Connect Agency Contacts (continued)

To continue steps needed to connect agency contacts to a bill for agency analysis:

1. **Input:** Information about the contact connection. Required fields are marked with *. Use Look Up to search for values.
2. **Select:** Save.

☑**Result**: Contact is connected to the bill for agency analysis. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Connect contacts page.



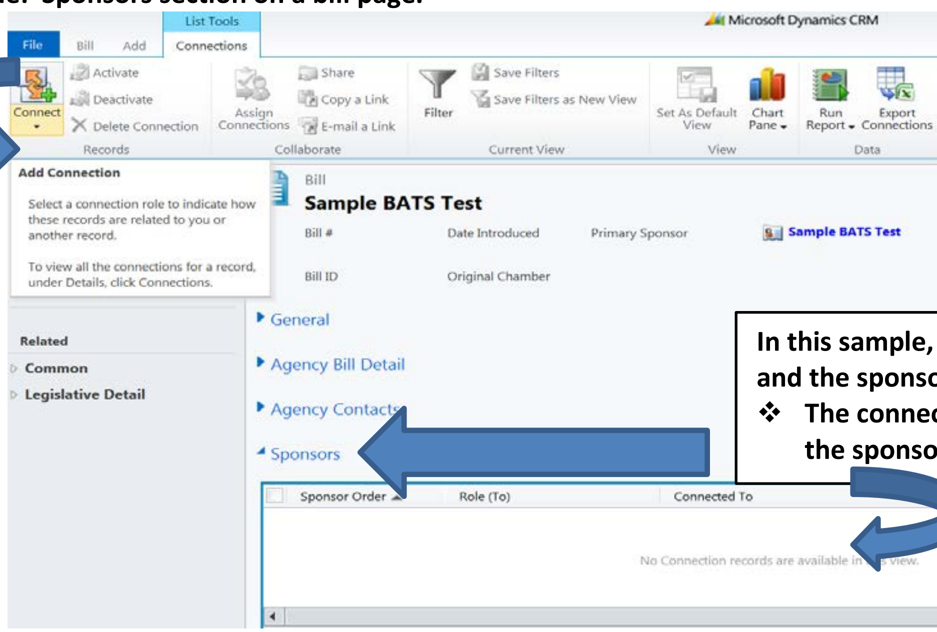
Prepare Bill Analysis - Connect Sponsors
Sponsors may be associated (connected) with a bill for agency analysis.

To connect sponsors to a bill for agency analysis:

1. **Select:** Bills (left side navigation pane).
2. **Scroll**: To find the bill (use the dropdown list to change view if needed).
3. **Select**: Name/Short Title of bill (left-mouse-click on the bill name/short title). The system will open the bill page.
4. **Select:** Sponsors section on the bill page.
5. **Select:** Connect (from the ribbon). The connect function will not be displayed on the ribbon if the sponsors section is not selected.

☑**Result**: The system will open connect sponsors page. An error message will be displayed if the action is not allowed due to security permissions or system validation error. ➔**Note:** Additional steps are needed to connect sponsors.

Sample: Sponsors section on a bill page.



In this sample, the bill page for Sample BATS Test was opened and the sponsors section was selected.

❖ **The connect function will not be displayed on the ribbon if the sponsors section is not selected.**

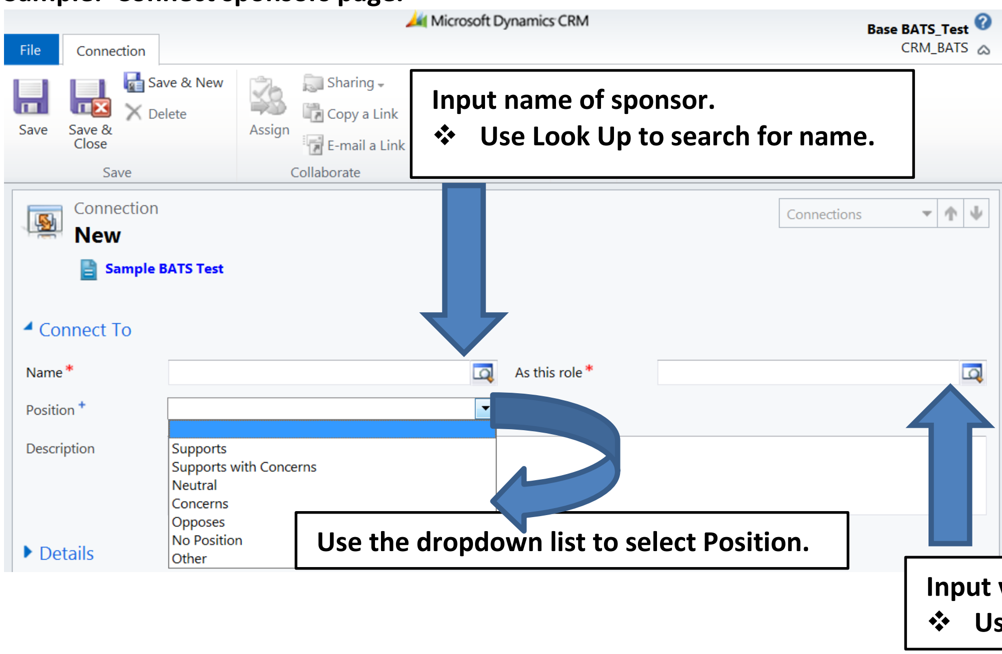
Prepare Bill Analysis - Connect Sponsors (continued)

To continue steps needed to connect sponsors to a bill for agency analysis:

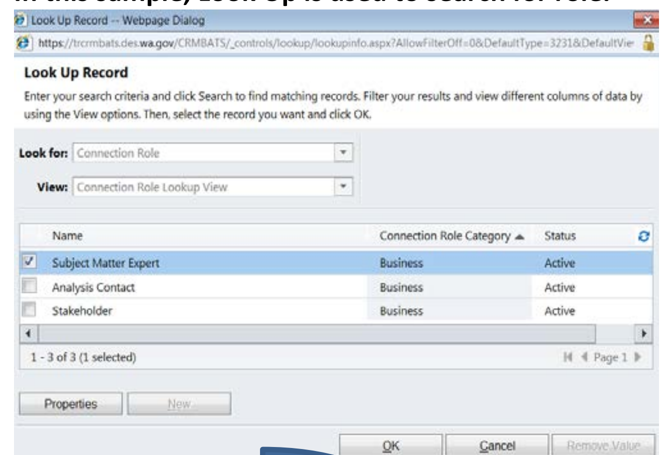
1. **Input:** Information about the sponsor connection. Required fields are marked with *. Use Look Up to search for values.
2. **Select:** Save.

☑**Result**: Sponsor is connected to the bill for agency analysis. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Connect sponsors page.



In this sample, Look Up is used to search for role.



Prepare Bill Analysis Details – Add Analysis

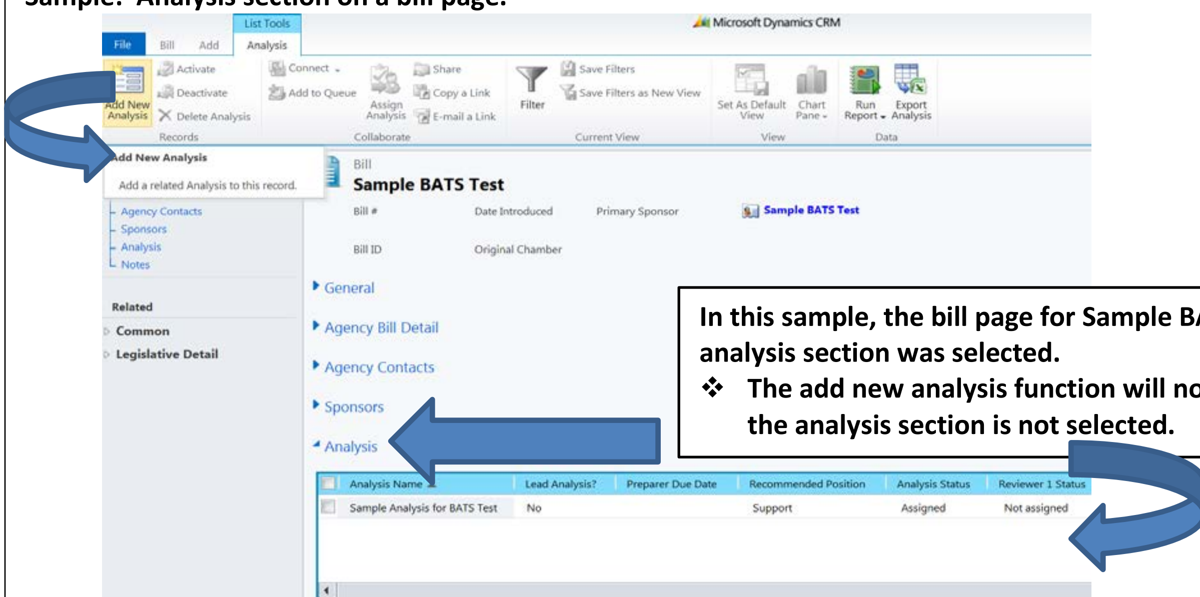
Detailed agency analysis may be added to a bill.

To add a new analysis to a bill:

1. **Select:** Bills (left side navigation pane).
2. **Scroll**: To find the bill (use the dropdown list to change view if needed).
3. **Select**: Name/Short Title of bill (left-mouse-click on the bill name/short title). The system will open the bill page.
4. **Select:** Analysis section on the bill page.
5. **Select:** Add New Analysis (from the ribbon). The add new analysis function will not be displayed on the ribbon if the analysis section is not selected.

☑**Result**: The system will open a new analysis page. An error message will be displayed if the action is not allowed due to security permissions or system validation error. ➔**Note:** Additional steps are needed to add a new analysis.

Sample: Analysis section on a bill page.



In this sample, the bill page for Sample BATS Test was opened and the analysis section was selected.

- ❖ **The add new analysis function will not be displayed on the ribbon if the analysis section is not selected.**

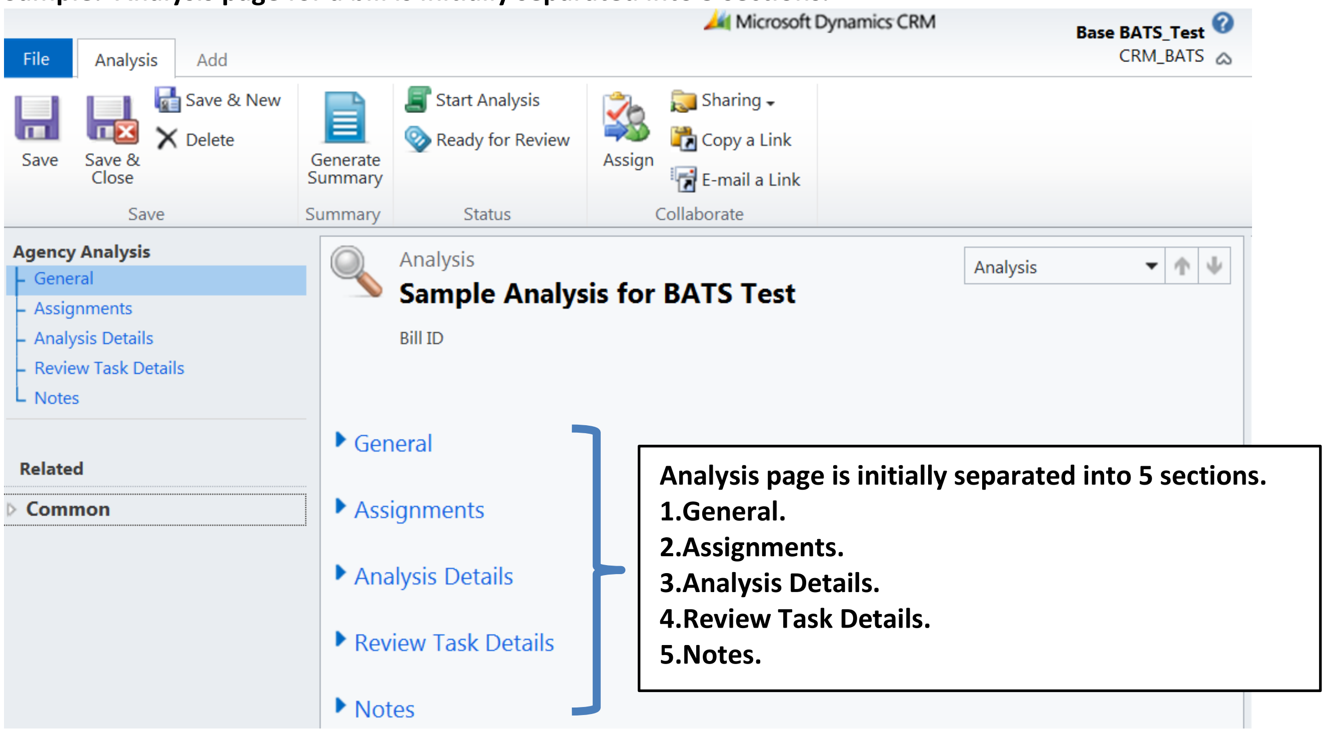
Prepare Bill Analysis Details – Add New Analysis (continued)

To continue steps needed to add a new analysis:

1. **Input:** General information about the analysis. Required fields are marked with *. Use Look Up to search for values.
2. **Select:** Save.

☑**Result**: New analysis is added to the bill page. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Analysis page for a bill is initially separated into 5 sections.



Prepare Bill Analysis Details – Assign Preparer

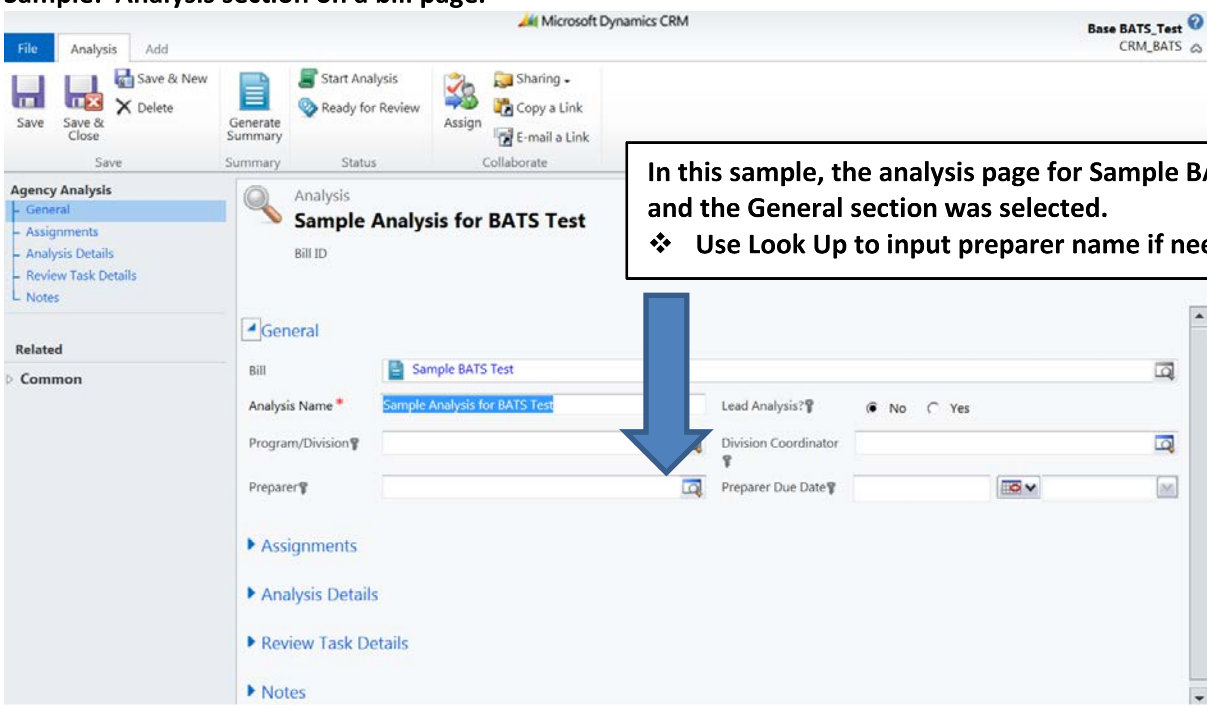
The preparer for analysis is the person who will provide analysis details.

To assign a preparer:

1. **Select:** Analysis section on the bill page.
2. **Select:** Analysis name (use the mouse to left-click analysis name). The system will open the analysis page.
3. **Select:** General section within the analysis.
4. **Input:** Preparer name. Use Look Up to search values.

☑**Result**: Preparer name is saved on the analysis page. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Analysis section on a bill page.



In this sample, the analysis page for Sample BATS Test was opened and the General section was selected.

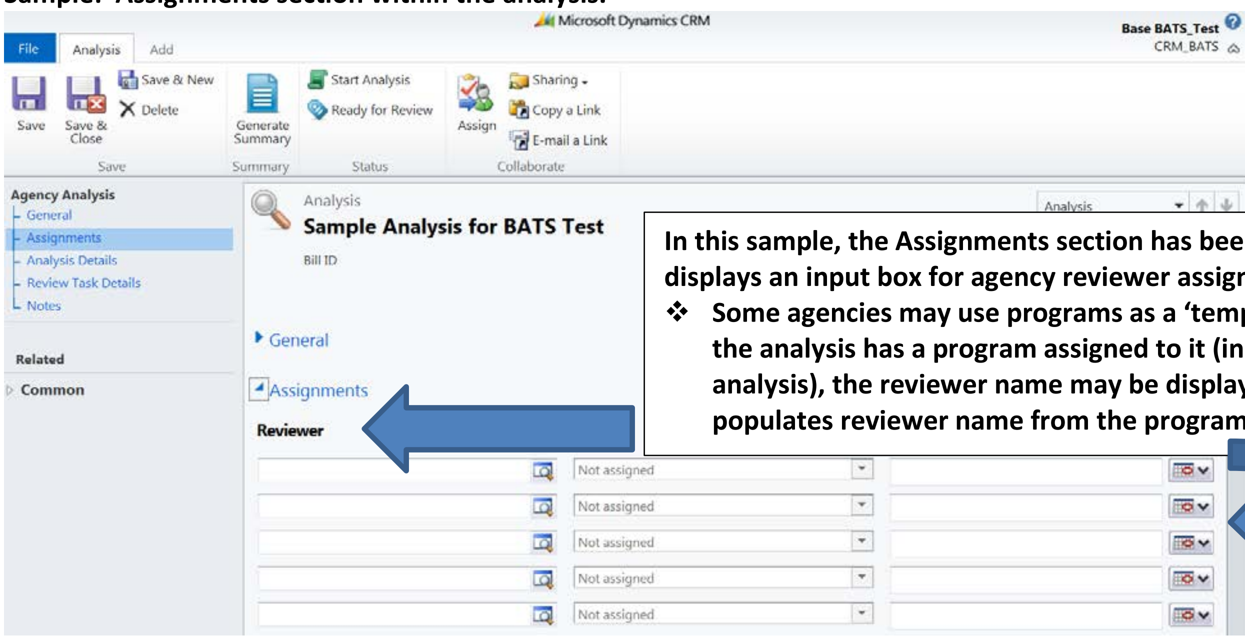
❖ **Use Look Up to input preparer name if needed.**

Prepare Bill Analysis Details – Add Assignments for Agency Reviewers
Assignments for agency reviewers may be added to an agency analysis.

To add assignments for agency analysis reviewers:
1. **Select:** Analysis section within the bill page.
2. **Select:** Analysis name (use the mouse to left-click analysis name). The system will open the analysis page.
3. **Select:** Assignments section within the analysis.

☑**Result**: The assignments section is opened. An error message will be displayed if the action is not allowed due to security permissions or system validation error. ➔**Note:** Additional steps are needed to add assignments for agency analysis reviewers.

Sample: Assignments section within the analysis.



In this sample, the Assignments section has been selected and the system displays an input box for agency reviewer assignments to be added.

❖ **Some agencies may use programs as a 'template' to identify reviewers. If the analysis has a program assigned to it (in the general section of the analysis), the reviewer name may be displayed already (the system populates reviewer name from the program 'template').**

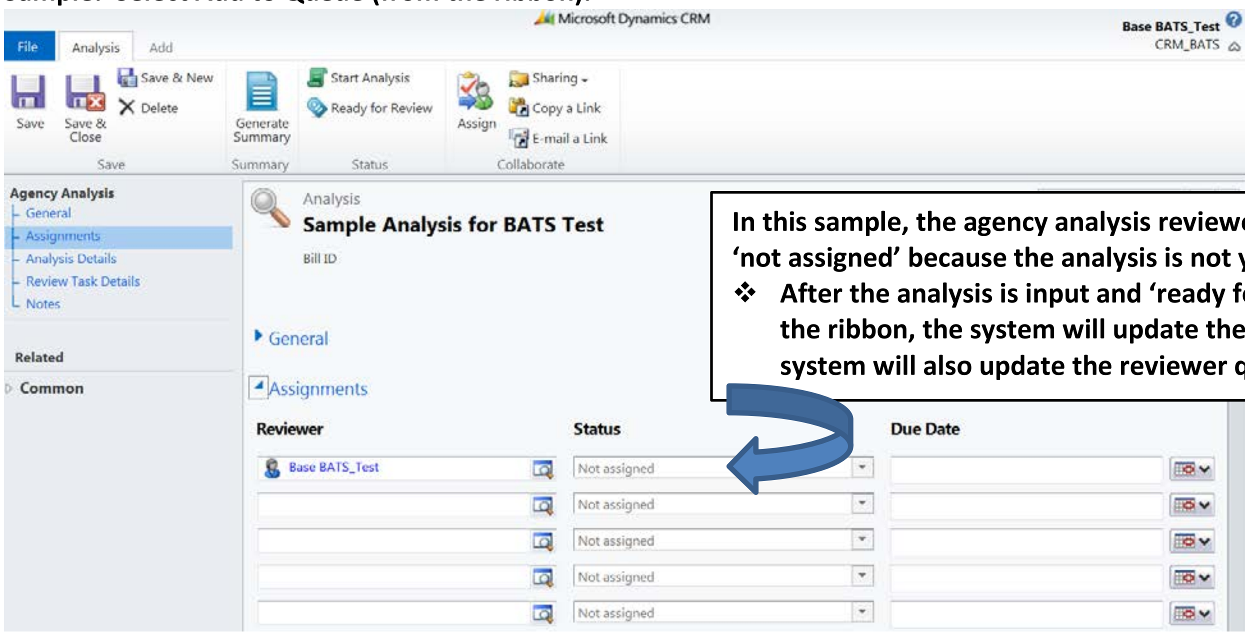
Prepare Bill Analysis Details – Add Assignments for Agency Reviewers (continued)

To continue steps needed to add assignments for agency analysis reviewers:

1. **Input:** Reviewer information. Use Look Up to search for values. Note: some agencies may use programs as a 'template' to identify reviewers. If the analysis has a program assigned to it (in the general section of the analysis), the reviewer name may be displayed already (the system populates reviewer name from the program 'template').
2. **Select:** Save.

☑**Result**: Reviewer assignment is saved and the status is 'not assigned'. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Select Add to Queue (from the ribbon).



In this sample, the agency analysis reviewer is saved. The status is 'not assigned' because the analysis is not yet ready for review.

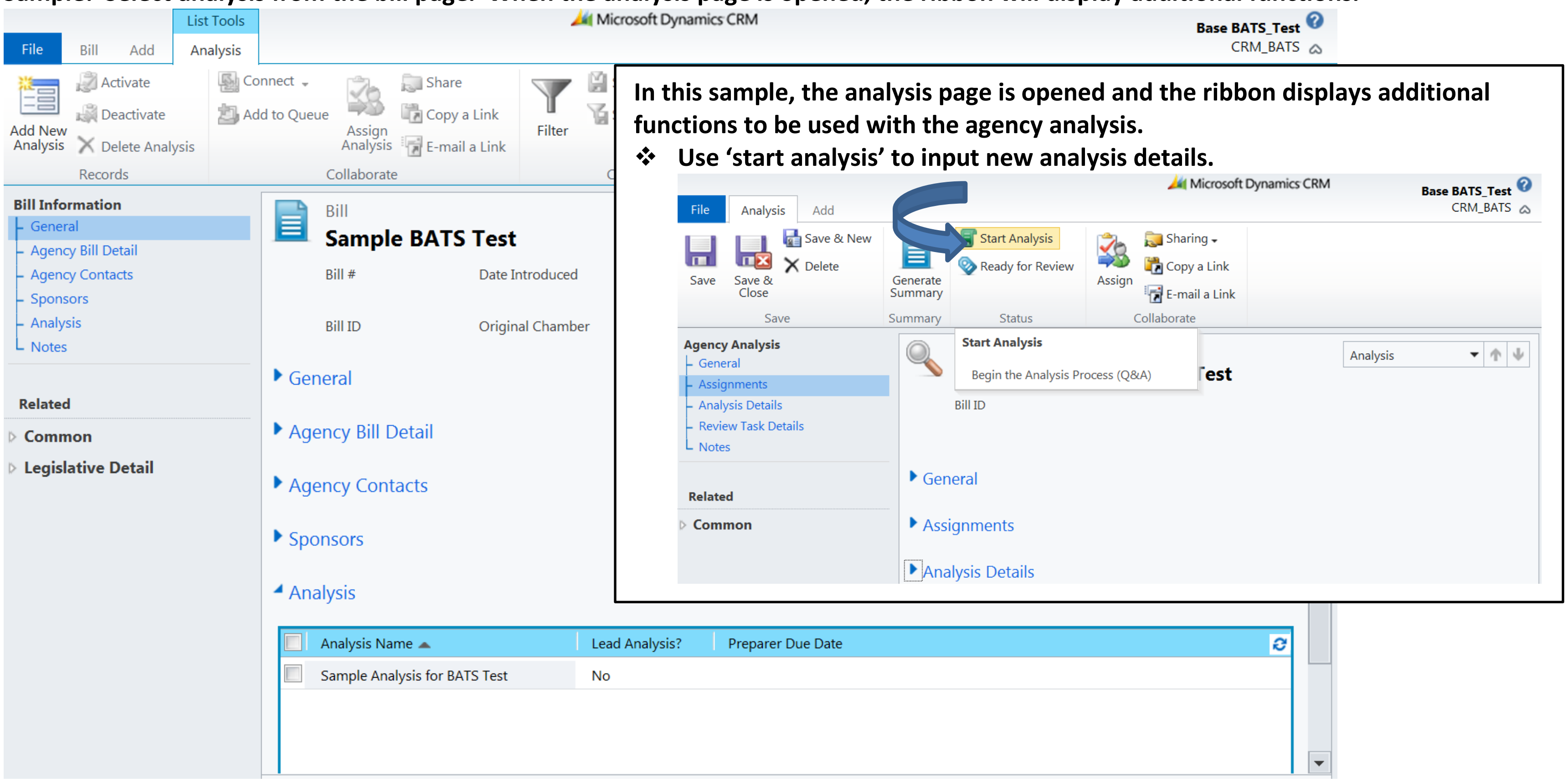
- **After the analysis is input and 'ready for review' is selected from the ribbon, the system will update the status to 'assigned' (the system will also update the reviewer queue).**

Provide Bill Analysis Details - Start Analysis

When 'start analysis' is selected, the system prompts for information using a question/answer format. This provides an easy way to input new analysis details.

❖ After the new analysis details are input, they may be edited/formatted from the analysis details section if needed.

Sample: Select analysis from the bill page. When the analysis page is opened, the ribbon will display additional functions.



In this sample, the analysis page is opened and the ribbon displays additional functions to be used with the agency analysis.

❖ **Use 'start analysis' to input new analysis details.**

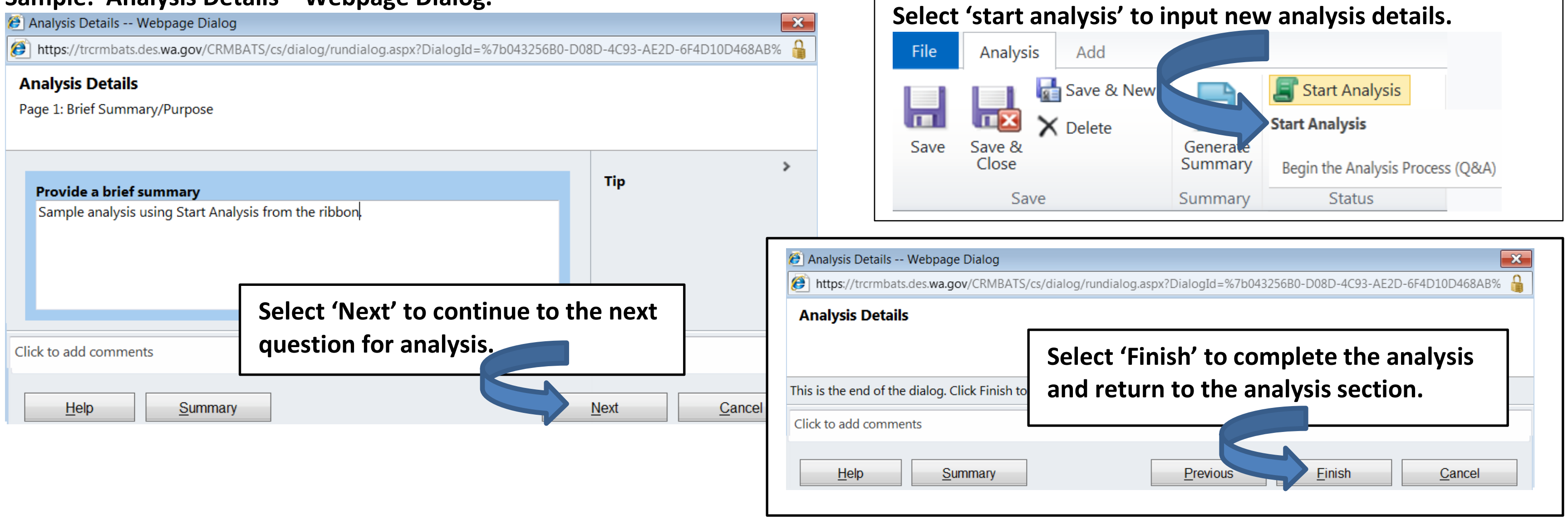
Provide Bill Analysis Details - Start Analysis (continued)

To start the analysis:

1. **Select:** Analysis section within the bill page.
2. **Scroll:** To find agency analysis.
3. **Select:** Agency analysis (use the mouse to left-click analysis name). The system will open the analysis page.
4. **Select:** Start Analysis (from the ribbon). The system will open the 'Analysis Details – Webpage Dialog' to prompt for information using a question/answer format. This provides an easy way to input new analysis of the bill.
5. **Input:** Information about the analysis.
6. **Select:** Finish.
7. **Select:** Save.

☑**Result**: Analysis information is displayed in the analysis details section. This information may be edited/formatted from the analysis details section if needed. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

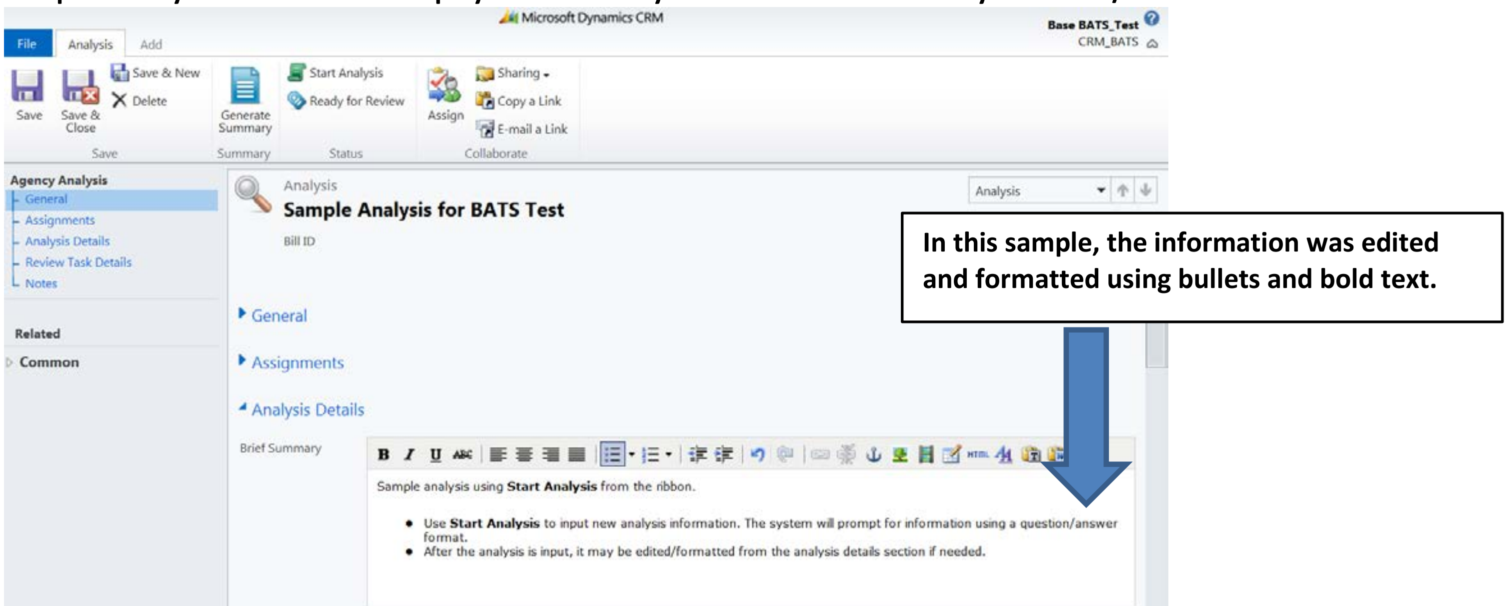
Sample: Analysis Details – Webpage Dialog.



Provide Bill Analysis Details - Start Analysis (continued)

Analysis information is displayed in the analysis details section. This information may be edited/formatted from the analysis details section if needed.

Sample: Analysis information is displayed in the analysis details section and may be edited/formatted if needed.



Provide Bill Analysis Details - Review Task Details

Additional reviewers and/or task details may be added to an agency analysis.

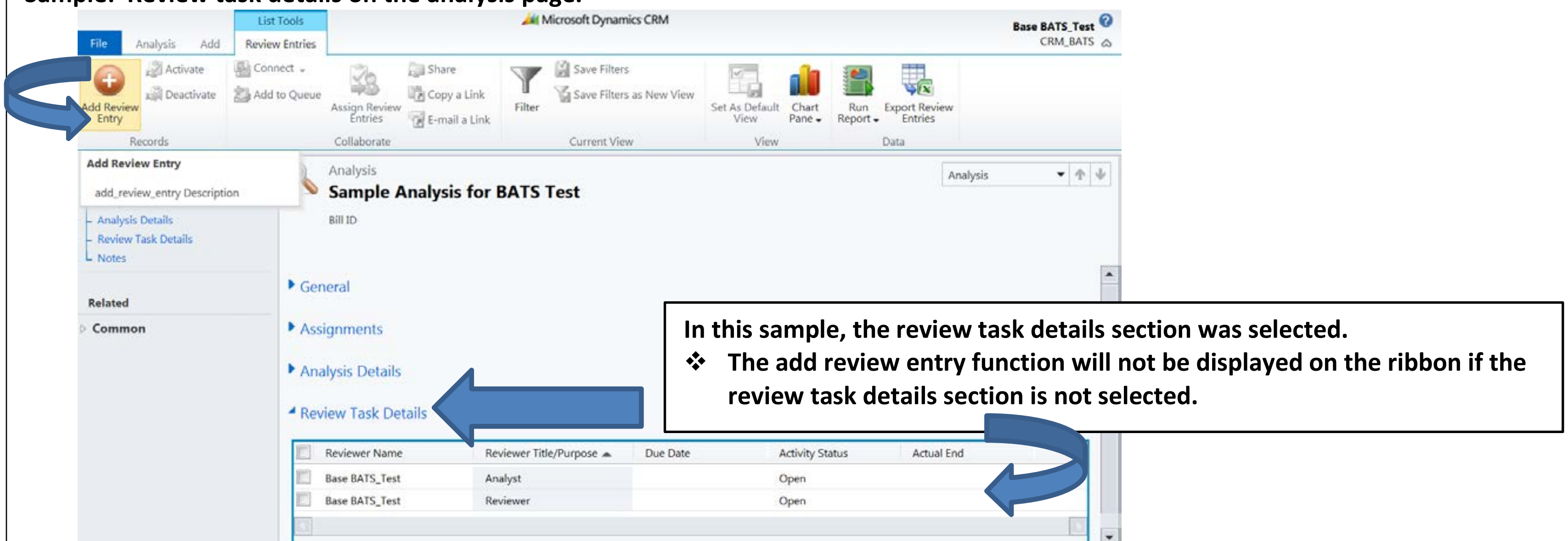
❖ Some agencies may use the review task details section to keep track of reviews to be completed by external reviewers (for example, vendors or other reviewers).

To add reviewers and/or task details:

1. **Select:** Analysis section within the bill.
2. **Select:** Analysis name (use the mouse to left-click analysis name). The system will open the analysis page.
3. **Select:** Review Task Details section.
4. **Select:** Add Review Entry (from ribbon).

☑**Result**: The system will open a review entry page. An error message will be displayed if the action is not allowed due to security permissions or system validation error. ➔**Note:** Additional steps are needed to add reviewers and/or task details.

Sample: Review task details on the analysis page.



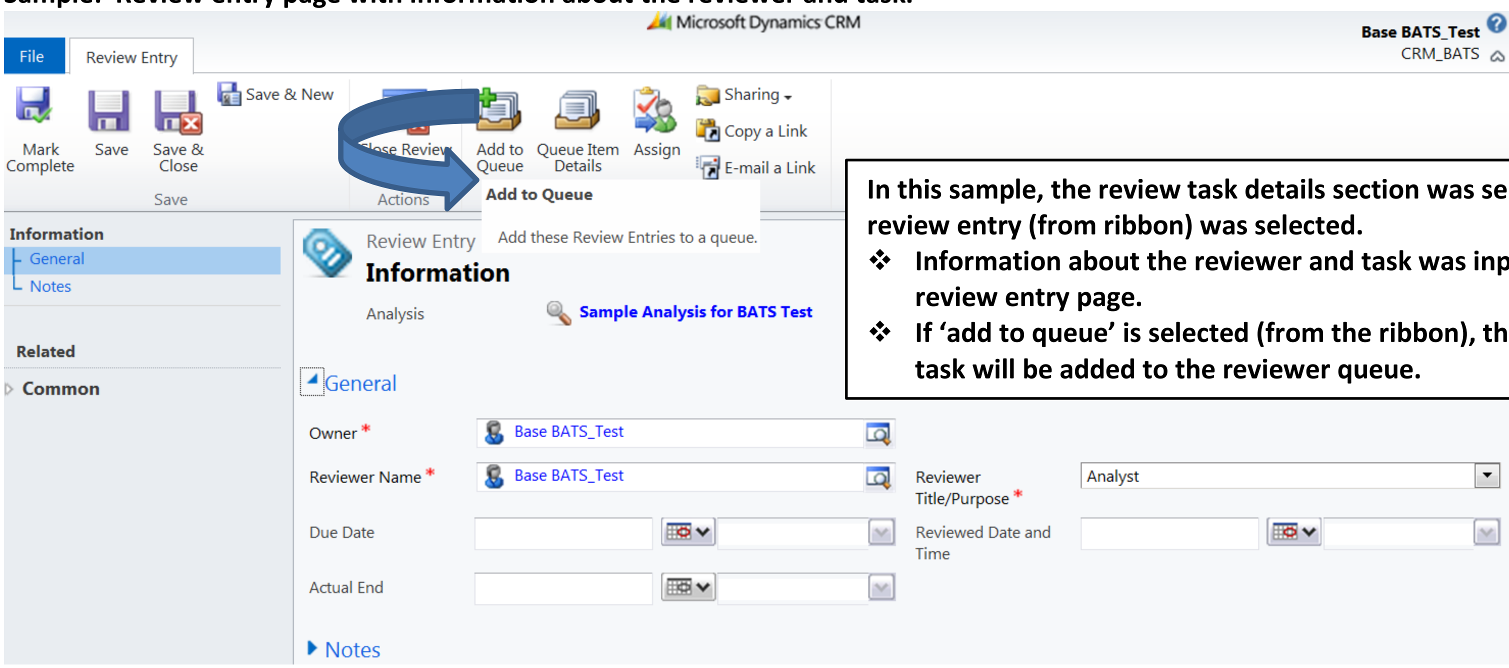
Provide Bill Analysis Details - Review Task Details (continued)

To continue steps needed to add reviewers and/or task details:

1. **Input:** Information about the reviewer and task.
2. **Select:** Save.

☑**Result**: Reviewers and/or task details are added. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Review entry page with information about the reviewer and task.



In this sample, the review task details section was selected and add review entry (from ribbon) was selected.

- **Information about the reviewer and task was input on the review entry page.**
- **If 'add to queue' is selected (from the ribbon), the review entry task will be added to the reviewer queue.**

Provide Bill Analysis Details – Notes

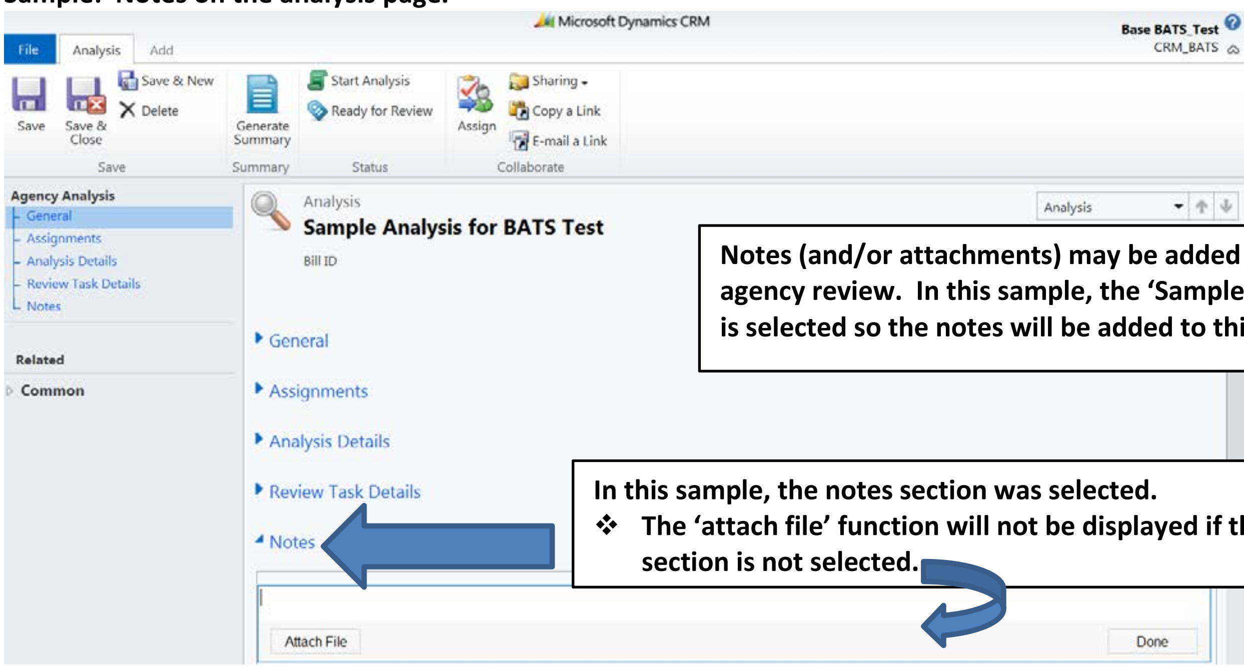
Analysis notes (and/or attachments) may be added to an agency analysis.

To add notes (and/or attachments) to the analysis:

1. **Select:** Analysis section within the bill.
2. **Select:** Analysis name (use the mouse to left-click analysis name). The system will open the analysis page.
3. **Select:** Notes section. This is the notes section on the analysis page (not the notes section on the bill page).
4. **Input:** Analysis notes (and/or attachments).
5. **Select:** Save.

☑**Result**: Notes (and/or attachments) are added to the analysis page. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Notes on the analysis page.



Notes (and/or attachments) may be added to the analysis for agency review. In this sample, the 'Sample Analysis for BATS Test' is selected so the notes will be added to this analysis only.

In this sample, the notes section was selected.

- ❖ **The 'attach file' function will not be displayed if the notes section is not selected.**

Provide Bill Analysis Details - Ready for Review

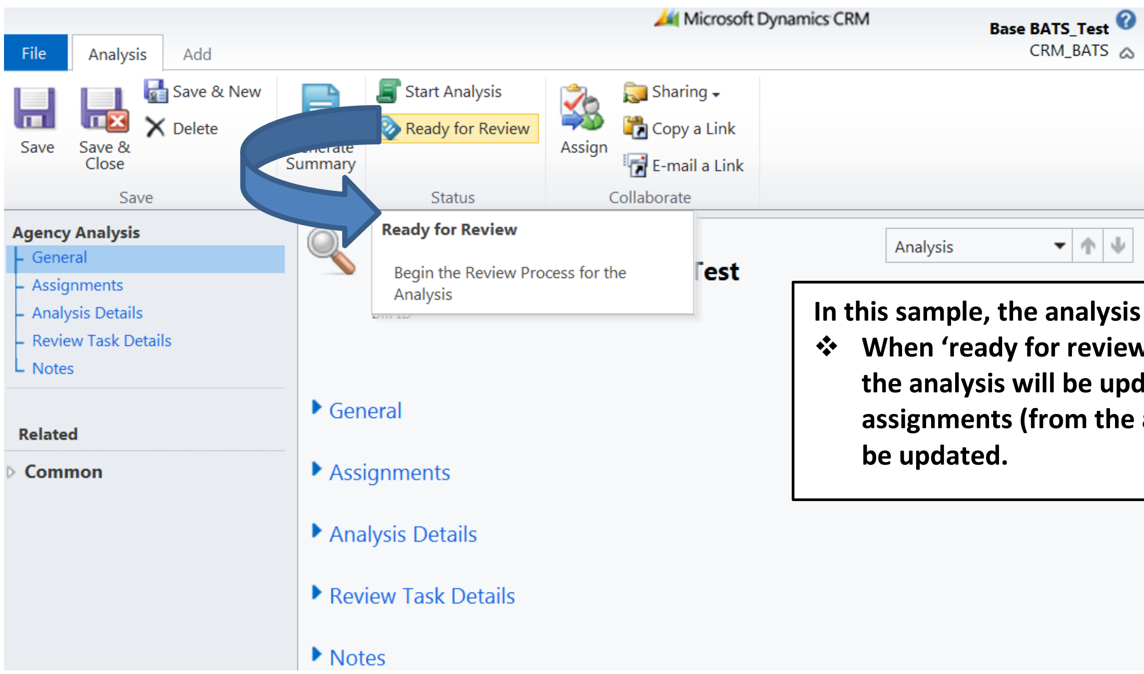
Ready for Review (from the ribbon) is used when the analysis details are ready to be reviewed.

To indicate the analysis is ready for review:

1. **Select:** Analysis section within the bill.
2. **Scroll:** To find agency analysis.
3. **Select:** Analysis name (use the mouse to left-click analysis name). The system will open the analysis page.
4. **Select:** Ready for Review (from the ribbon).

☑**Result**: Agency analysis is ready for review by agency reviewers (status is updated). An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Ready for Review (from the ribbon) is used when the analysis details are ready to be reviewed.



In this sample, the analysis page for Sample BATS Test was opened.

- **When 'ready for review' is selected (from the ribbon), status for the analysis will be updated and queues associated with reviewer assignments (from the assignments section in the analysis) will be updated.**

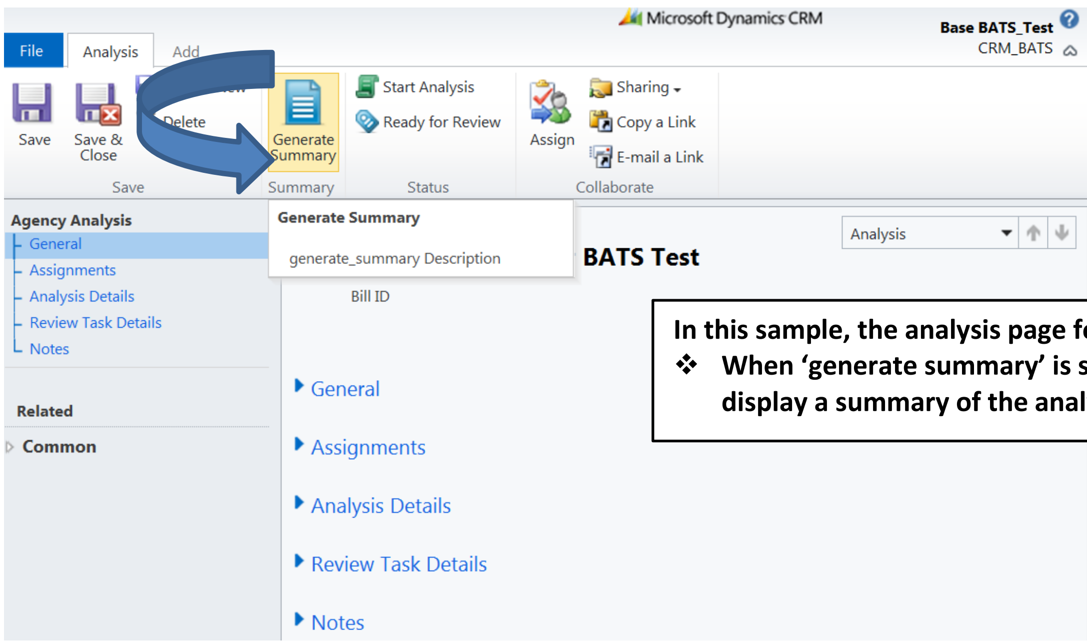
Review Bill Analysis Details – Generate Summary
Generate Summary (from the ribbon) is used when the agency reviewers are ready to review the analysis details.

To review a summary of an agency analysis:

1. **Select:** Analysis section within the bill.
2. **Scroll:** To find agency analysis.
3. **Select:** Analysis name (use the mouse to left-click analysis name). The system will open the analysis page.
4. **Select:** Generate Summary (from the ribbon).

☑**Result**: The system will display a summary of the analysis details for review. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Generate summary (from the ribbon) is used when the analysis is ready to be reviewed.



In this sample, the analysis page for Sample BATS Test was opened.

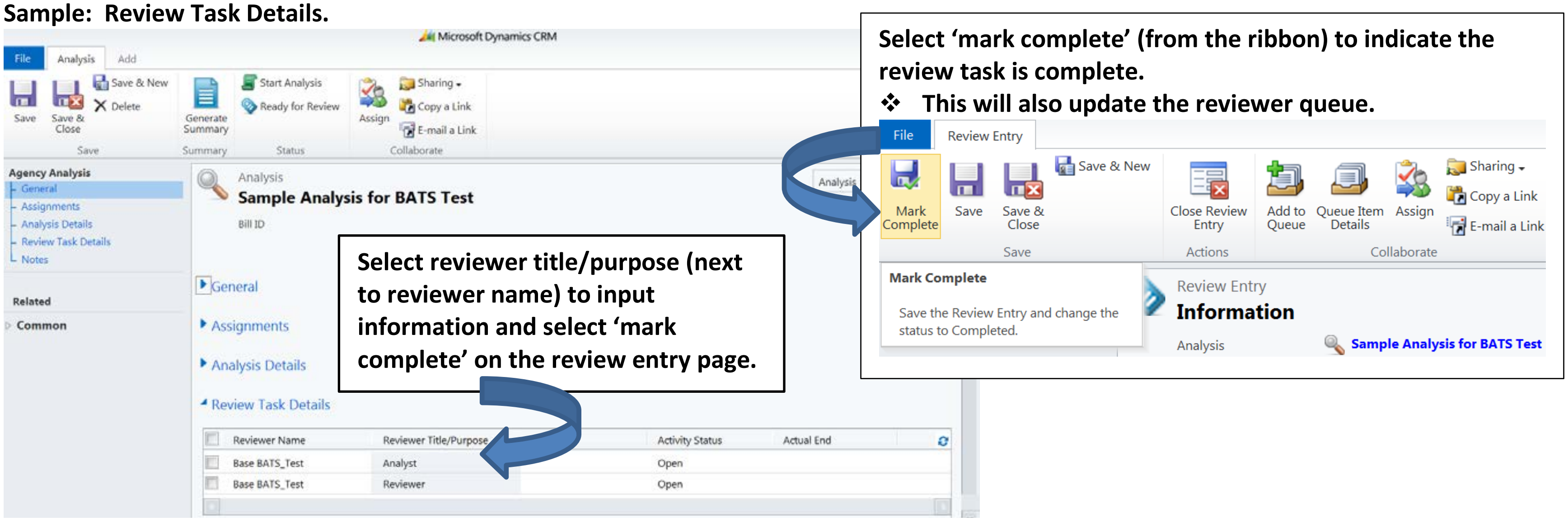
- **When 'generate summary' is selected from the ribbon, the system will display a summary of the analysis details for review.**

Review Bill Analysis Details – Review Task Details and Mark Review Task Complete
When each review task is complete, the task may be updated on the analysis to indicate the assigned task (review) is complete.

To update the reviewer assigned task ('mark complete'):
1. **Select:** Analysis section within the bill.
2. **Scroll:** To find agency analysis.
3. **Select:** Analysis name (use the mouse to left-click analysis name). The system will open the analysis page.
4. **Select:** Review Task Details section.
5. **Scroll:** To find the task.
6. **Select:** Reviewer Title/Purpose (next to reviewer name). The system will open the review entry page.
7. **Input:** Information and/or notes if needed.
8. **Select:** Mark Complete (from the ribbon).

☑**Result**: Status for the task is marked complete. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

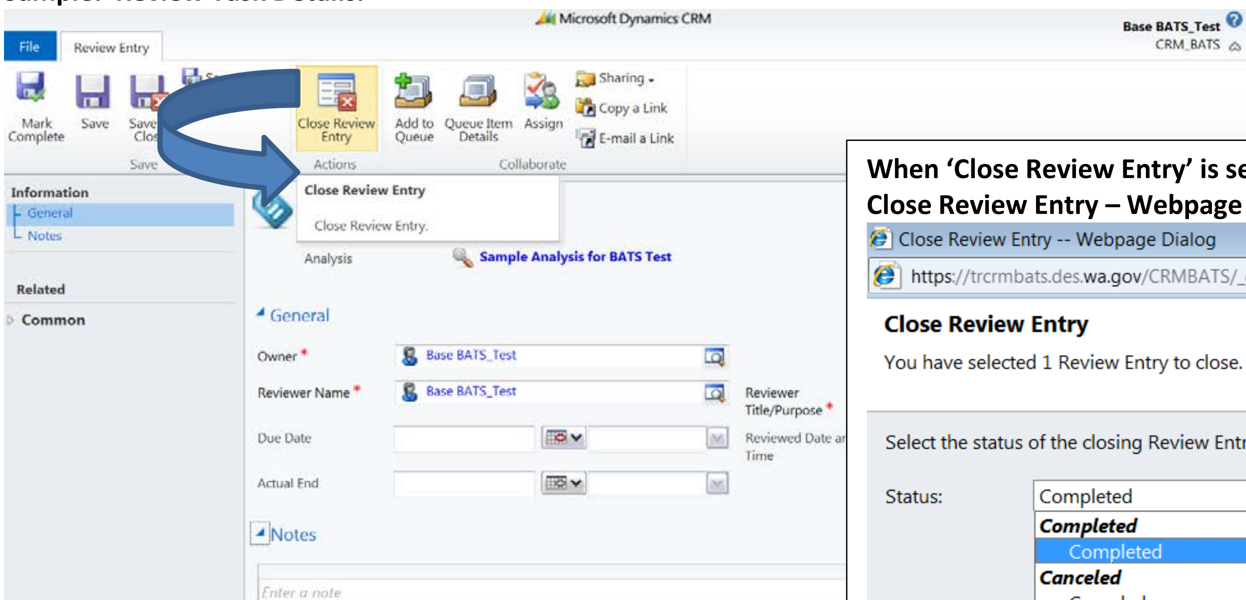
Sample: Review Task Details.



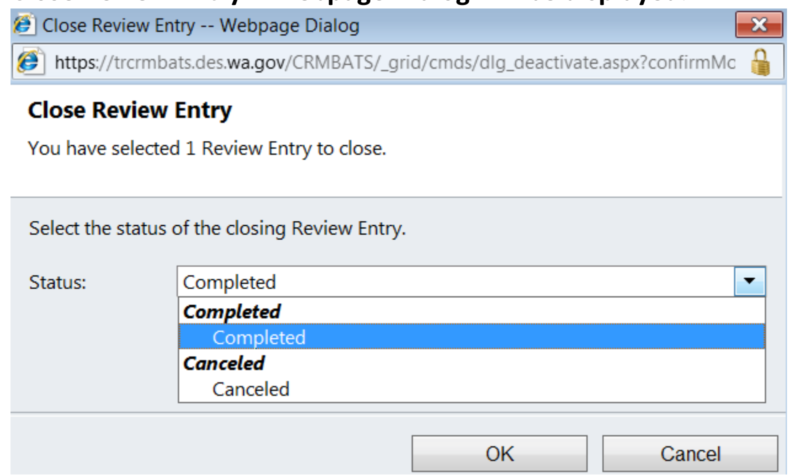
Review Bill Analysis Details – Review Task Details and Mark Review Task Complete (continued)

If a review task has been created and needs to be closed by someone other than the assigned reviewer, there is a 'Close Review Entry' function available from the ribbon (this step is usually completed by the agency coordinator).

Sample: Review Task Details.



When 'Close Review Entry' is selected (from the ribbon), the Close Review Entry – Webpage Dialog will be displayed.



Complete Bill Analysis Details – Complete Review Tasks

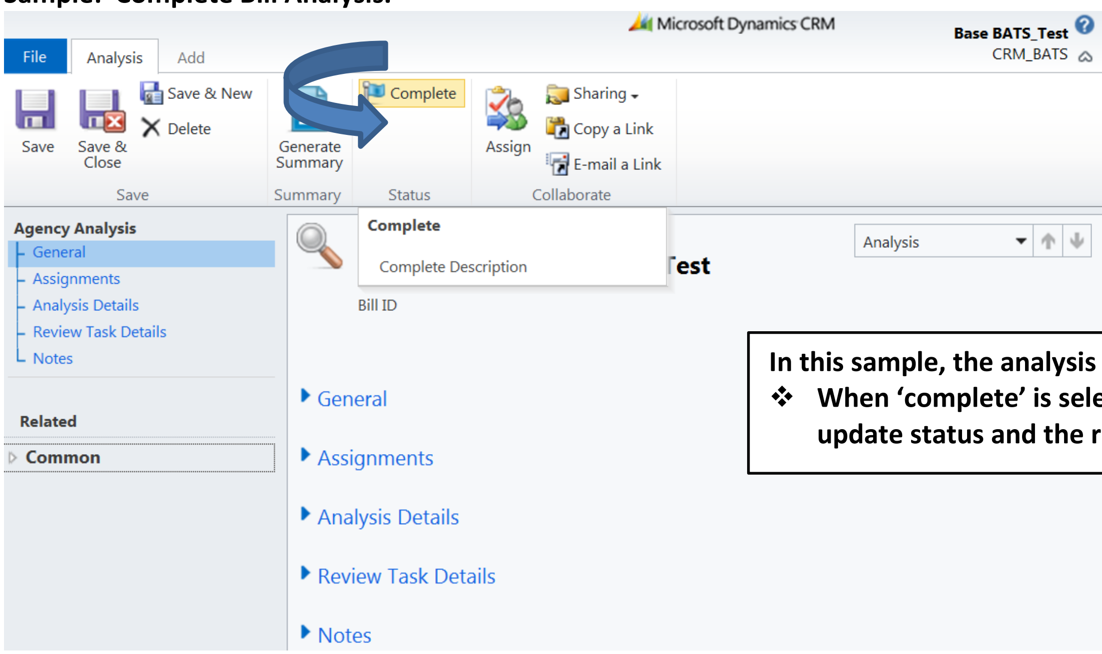
When all review tasks are complete for an analysis, the analysis may be updated to indicate the review cycle is complete (this step is usually completed by the agency coordinator).

To update the analysis as 'complete':

1. **Select:** Analysis section within the bill.
2. **Scroll:** To find agency analysis.
3. **Select:** Analysis name (use the mouse to left-click analysis name). The system will open the analysis page.
4. **Select:** Complete (from the ribbon).

☑**Result**: Status for the analysis is updated. An error message will be displayed if the action is not allowed due to security permissions or system validation error.

Sample: Complete Bill Analysis.



In this sample, the analysis page for Sample BATS Test was opened.

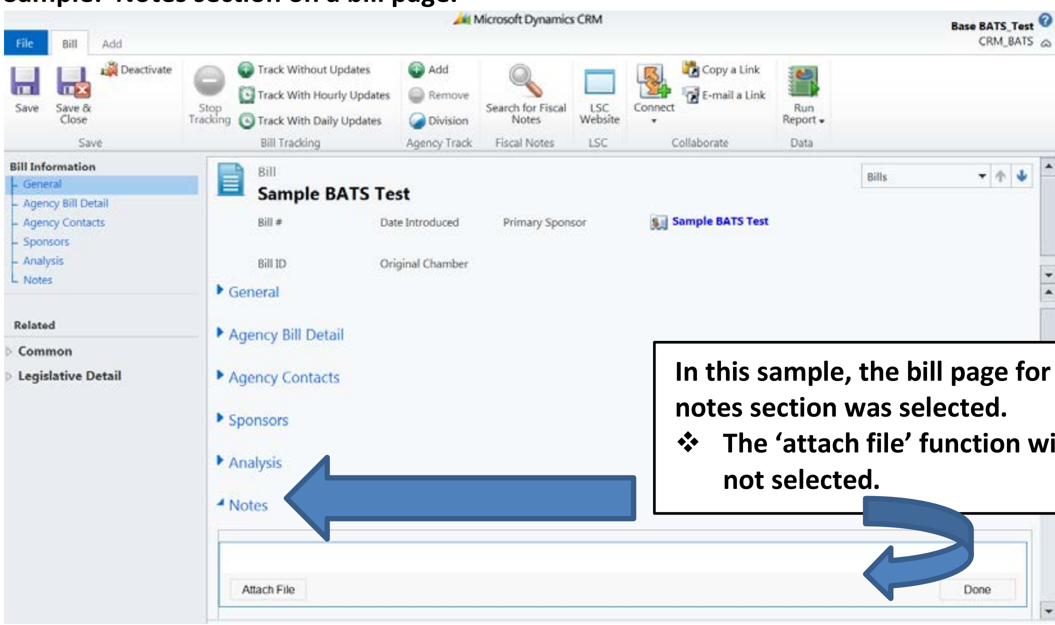
- **When 'complete' is selected from the ribbon, the system will update status and the reviewer queue.**

Complete Bill Analysis – Add Notes
Notes (and/or attachments) may be added to a bill.

To add notes (and/or attachments) to a bill for agency analysis:
1. **Select:** Bills (left side navigation pane).
2. **Scroll**: To find the bill (use the dropdown list to change view if needed).
3. **Select**: Name/Short Title of bill (left-mouse-click on the bill name/short title). The system will open the bill page.
4. **Select:** Notes section.
5. **Input:** Notes (and/or attachments).

☑**Result**: Notes (and/or attachments) are added to the bill page. An error message will be displayed if the action is not allowed due to security permissions or system validation.

Sample: Notes section on a bill page.



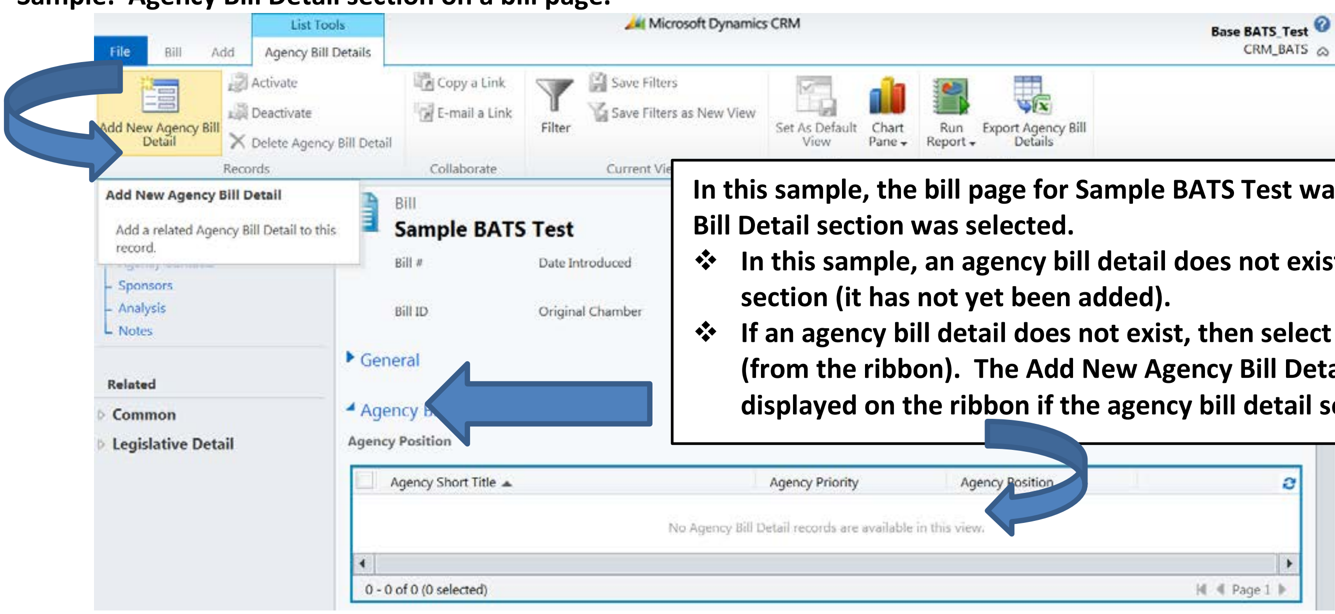
In this sample, the bill page for Sample BATS Test was opened and the notes section was selected.
- ❖ **The 'attach file' function will not be displayed if the notes section is not selected.**

Complete Bill Analysis – Agency Bill Details
Agency bill details (including agency position) may be added to a bill.

To add agency bill details to a bill page:
1. **Select:** Bills (left side navigation pane).
2. **Scroll**: To find the bill (use the dropdown list to change views if needed).
3. **Select**: Name/Short Title of bill (left-mouse-click on the bill name/short title). The system will open the bill page.
4. **Select**: Agency Bill Detail section on the bill page.
5. **Select**: Agency bill detail (left-mouse click on the agency short title). If an agency bill detail does not exist, then select Add New Agency Bill Detail (from the ribbon).
6. **Input**: Information about the agency bill details.

☑**Result**: Agency Bill Detail section is updated. An error message will be displayed if the action is not allowed due to security permissions or system error.

Sample: Agency Bill Detail section on a bill page.



In this sample, the bill page for Sample BATS Test was opened and the Agency Bill Detail section was selected.
- **In this sample, an agency bill detail does not exist in the agency bill detail section (it has not yet been added).**
- **If an agency bill detail does not exist, then select Add New Agency Bill Detail (from the ribbon). The Add New Agency Bill Detail function will not be displayed on the ribbon if the agency bill detail section is not selected.**