

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). <ul style="list-style-type: none"> ❖ Select track without updates. ❖ Select track with daily updates. ❖ Select track with hourly updates. ❖ Select stop tracking. | Starting point for tracking a bill. <ul style="list-style-type: none"> ❖ Change views if needed. ❖ Select tracking functions from the ribbon. |
| Tracking for Agency/Division | Open a bill page (find and select a bill). <ul style="list-style-type: none"> ❖ Select add. ❖ Select remove. ❖ Select division. | Starting point for tracking a bill. <ul style="list-style-type: none"> ❖ Change views if needed. ❖ Select tracking functions from the ribbon. |
| Tasks and Activities | Open a bill page (find and select a bill). <ul style="list-style-type: none"> ❖ Select task and/or activity. ❖ Input information about task and/or activity. | Starting point for managing tasks and activities associated with a bill. <ul style="list-style-type: none"> ❖ Select tasks and activities from the ribbon. |
| Related Bills | Open a bill page (find and select a bill). <ul style="list-style-type: none"> ❖ Select related bills. ❖ Input information about related bills. | Starting point for relating bills for tracking purposes. <ul style="list-style-type: none"> ❖ Select related bills from the ribbon. |
| History, Hearings, RCW's | Open a bill page (find and select a bill). <ul style="list-style-type: none"> ❖ Display history. ❖ Display hearings. ❖ Display RCW's. | Starting point for displaying detailed information about bill history, hearings, RCW's. <ul style="list-style-type: none"> ❖ 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). <ul style="list-style-type: none"> ❖ Search Fiscal Notes. ❖ Display LSC Website. | Starting point for displaying fiscal notes or LSC website. <ul style="list-style-type: none"> ❖ 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.

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Microsoft Dynamics CRM

Base BATS_Test CRM_BATS

File Bill Add

Save Save & Close Deactivate Stop Tracking Track Without Updates Track With Hourly Updates Track With Daily Updates Add Remove Division Search for Fiscal Notes LSC Website Connect Copy a Link E-mail a Link Run Report

Save Bill Tracking Agency Track Fiscal Notes LSC Collaborate Data

Bill Information

- General
- Agency Bill Detail
- Agency Contacts
- Sponsors
- Analysis
- Notes

Related

Common

Legislative Detail

- Bill History
- Hearings
- RCWs
- Tracking

Bill

Sample BATS Test

Bill # Date Introduced Primary Sponsor

Bill ID Original Chamber

General

Agency Bill Detail

Agency Contacts

Sponsors

Analysis

Notes

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

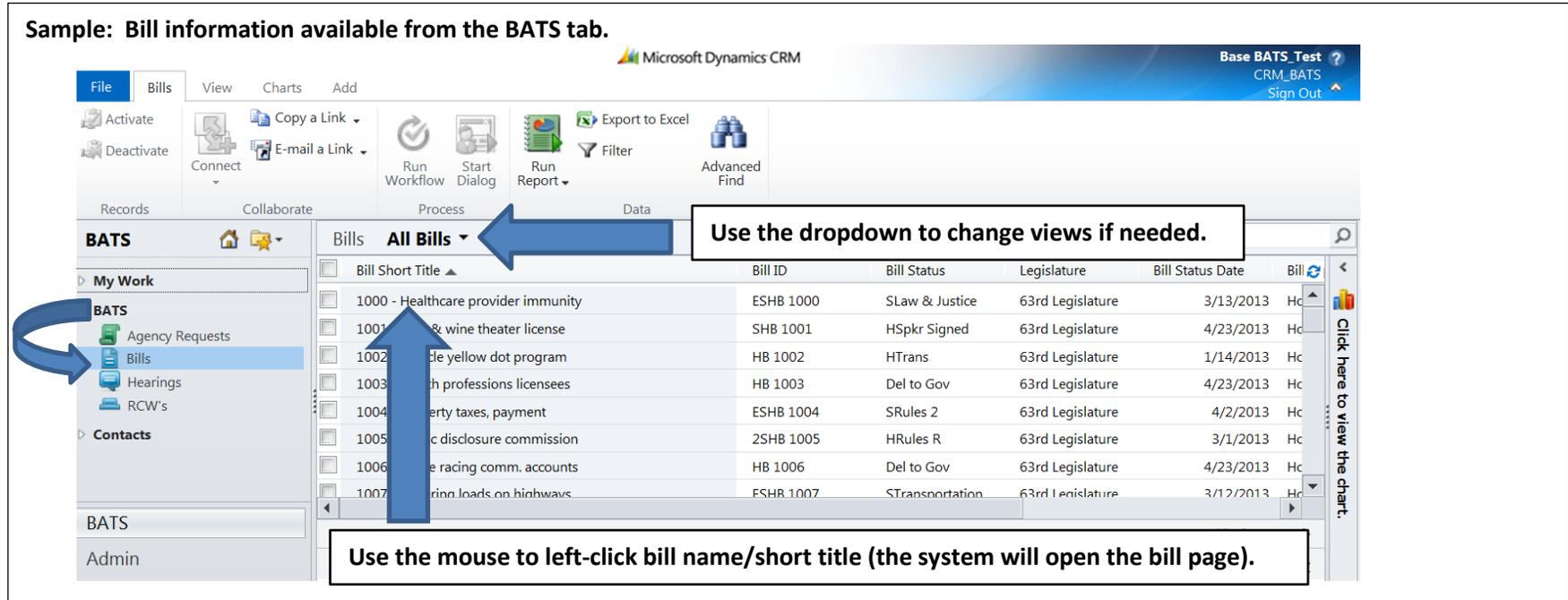
A list of bills is available from the BATS tab in the left side navigation pane and from some of the BATS dashboards.

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.



The screenshot shows the Microsoft Dynamics CRM interface. The left navigation pane has 'BATS' selected. The main area shows a table of bills with columns: Bill Short Title, Bill ID, Bill Status, Legislature, Bill Status Date, and Bill. A dropdown menu is open over the table, showing 'All Bills'. A blue arrow points from the 'All Bills' dropdown to a callout box that says 'Use the dropdown to change views if needed.' Another blue arrow points from the 'Bills' tab in the left navigation pane to another callout box that says 'Use the mouse to left-click bill name/short title (the system will open the bill page).' A third blue arrow points from the 'Bills' tab in the left navigation pane to the 'Bills' section of the main area. A vertical callout on the right side says 'Click here to view the chart.'

| Bill Short Title | Bill ID | Bill Status | Legislature | Bill Status Date | Bill |
|-------------------------------------|-----------|-----------------|------------------|------------------|------|
| 1000 - Healthcare provider immunity | ESHB 1000 | SLaw & Justice | 63rd Legislature | 3/13/2013 | Hc |
| 1001 - ... & wine theater license | SHB 1001 | HSpkr Signed | 63rd Legislature | 4/23/2013 | Hc |
| 1002 - ...le yellow dot program | HB 1002 | HTrans | 63rd Legislature | 1/14/2013 | Hc |
| 1003 - ...th professions licensees | HB 1003 | Del to Gov | 63rd Legislature | 4/23/2013 | Hc |
| 1004 - ...erty taxes, payment | ESHB 1004 | SRules 2 | 63rd Legislature | 4/2/2013 | Hc |
| 1005 - ...ic disclosure commission | 2SHB 1005 | HRules R | 63rd Legislature | 3/1/2013 | Hc |
| 1006 - ...e racing comm. accounts | HB 1006 | Del to Gov | 63rd Legislature | 4/23/2013 | Hc |
| 1007 - ...ring loads on highways | ESHB 1007 | STransportation | 63rd Legislature | 3/12/2013 | Hc |

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.

In this sample, the 'Bill Tracking' dashboard is displayed.

Use the dropdown list to change views if needed.
❖ This sample uses the 'All Bills' view.

| Bill Short Title | Bill ID | Bill Status | Legislature | Bill Status Date | Bill Type |
|-------------------------------------|-----------|----------------|------------------|------------------|------------------|
| 1000 - Healthcare provider immunity | ESHB 1000 | SLaw & Justice | 63rd Legislature | 3/13/2013 | House Bills (HB) |
| Beer & wine theater license | SHB 1001 | HSpkr Signed | 63rd Legislature | 4/23/2013 | House Bills (HB) |
| Vehicle yellow dot program | HB 1002 | HTrans | 63rd Legislature | 1/14/2013 | House Bills (HB) |
| Health professions licensees | HB 1003 | Del to Gov | 63rd Legislature | 4/23/2013 | House Bills (HB) |
| Property taxes, payment | ESHB 1004 | SRules 2 | 63rd Legislature | 4/2/2013 | House Bills (HB) |

Use the mouse to left-click bill name/short title (the system will open the bill page).

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.

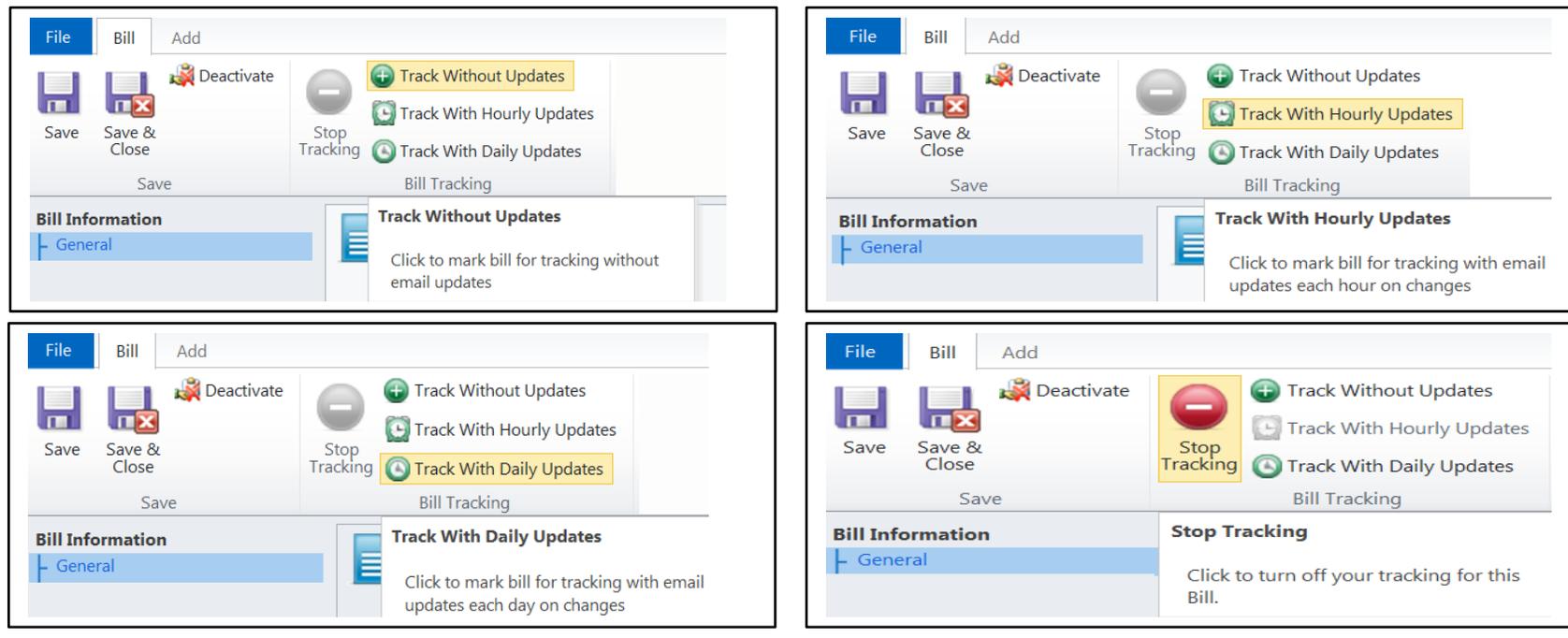
- 1.General.
- 2.Agency Bill Detail.
- 3.Agency Contacts.
- 4.Sponsors.
- 5.Analysis.
- 6.Notes.

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.



The image displays four screenshots of the BATS ribbon interface, each showing a different bill tracking option selected and highlighted in yellow:

- Top Left:** The "Track Without Updates" button is selected. The "Bill Information" pane shows the "Track Without Updates" section with the text: "Click to mark bill for tracking without email updates".
- Top Right:** The "Track With Hourly Updates" button is selected. The "Bill Information" pane shows the "Track With Hourly Updates" section with the text: "Click to mark bill for tracking with email updates each hour on changes".
- Bottom Left:** The "Track With Daily Updates" button is selected. The "Bill Information" pane shows the "Track With Daily Updates" section with the text: "Click to mark bill for tracking with email updates each day on changes".
- Bottom Right:** The "Stop Tracking" button is selected. The "Bill Information" pane shows the "Stop Tracking" section with the text: "Click to turn off your tracking for this Bill".

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.

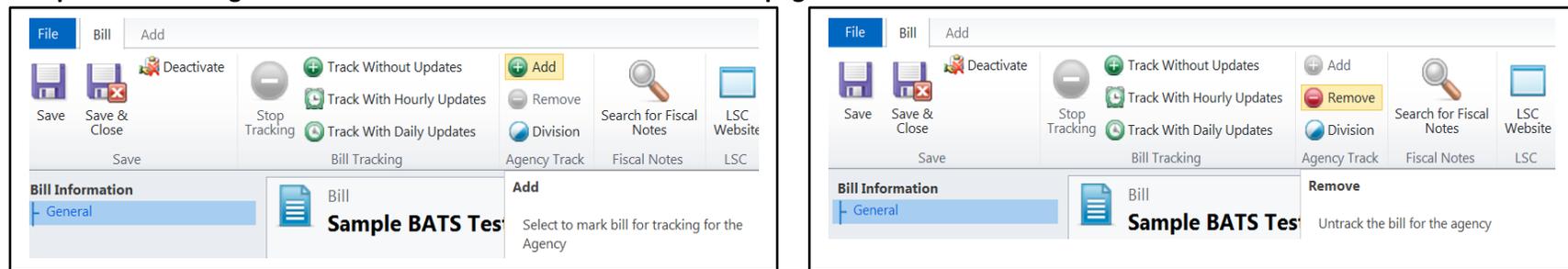
- ❖ Track Without Updates.
- ❖ Track With Hourly Updates.
- ❖ Track with Daily Updates.
- ❖ Stop Tracking.

Bill Tracking - Agency/Division

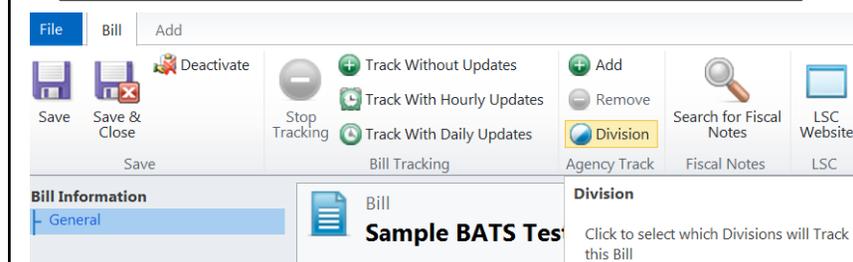
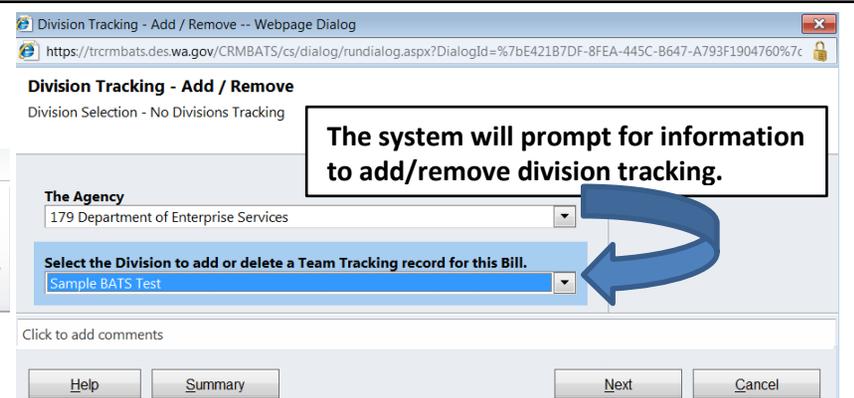
Bill tracking functions are available from the ribbon on the bill page.

| 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.



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

Bill Tracking - Agency/Division (continued)

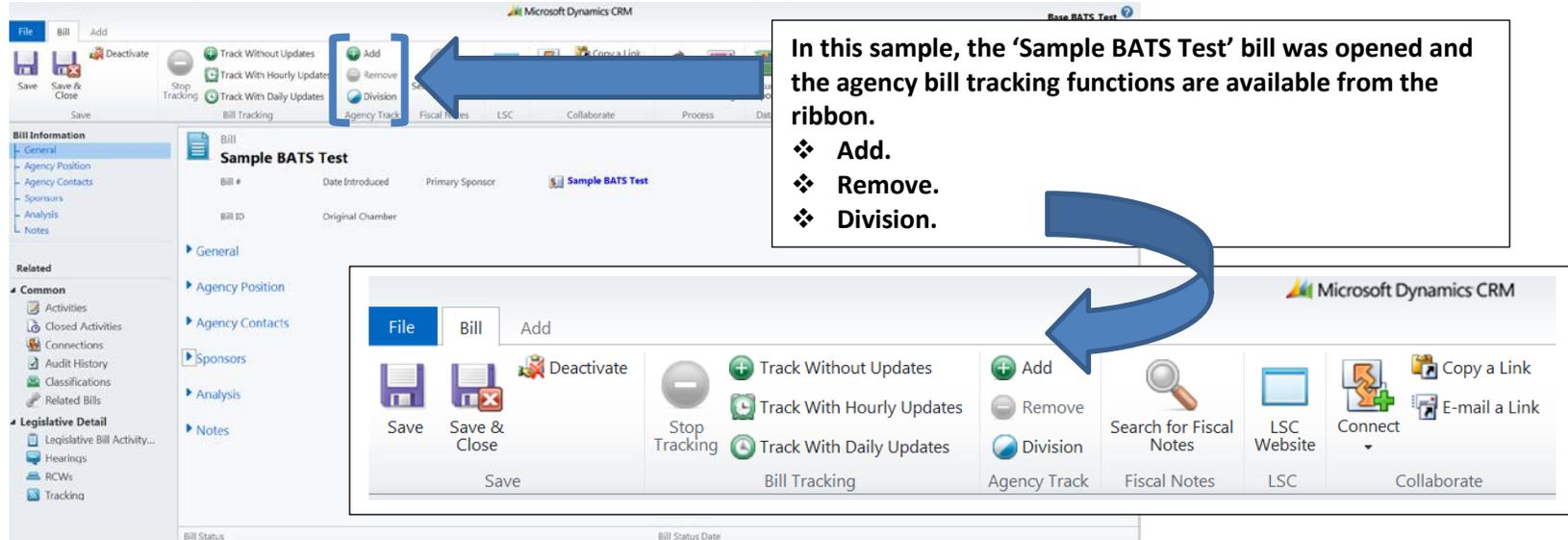
Bill tracking functions are available from the ribbon on the bill page.

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.



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

- ❖ Add.
- ❖ Remove.
- ❖ Division.

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.

Division Tracking - Add / Remove -- Webpage Dialog
https://trcrmbats.des.wa.gov/CRMBATS/cs/dialog/rundialog.aspx?DialogId=%7be421b7df-8fea-445c-b647-a793f1904760%7c

Division Tracking - Add / Remove
Division Selection - No Divisions Tracking

The Agency
179 Department of Enterprise Services

Select the Division to add or delete a Team Tracking record for this Bill.
Sample BATS Test

Click to add comments

Help Summary Next Cancel

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.

Division Tracking - Add / Remove -- Webpage Dialog
https://trcrmbats.des.wa.gov/CRMBATS/cs/dialog/rundialog.aspx?DialogId=%7be421b7df-8fea-445c-b647-a793f1904760%7c

Division Tracking - Add / Remove
Division Selection

The Agency
179 Department of Enterprise Services

List of Divisions that are tracking this Bill.
Sample BATS Test

Select the Division to add or delete a Team Tracking record for this Bill.
Sample BATS Test

Click to add comments

Help Summary Next Cancel

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

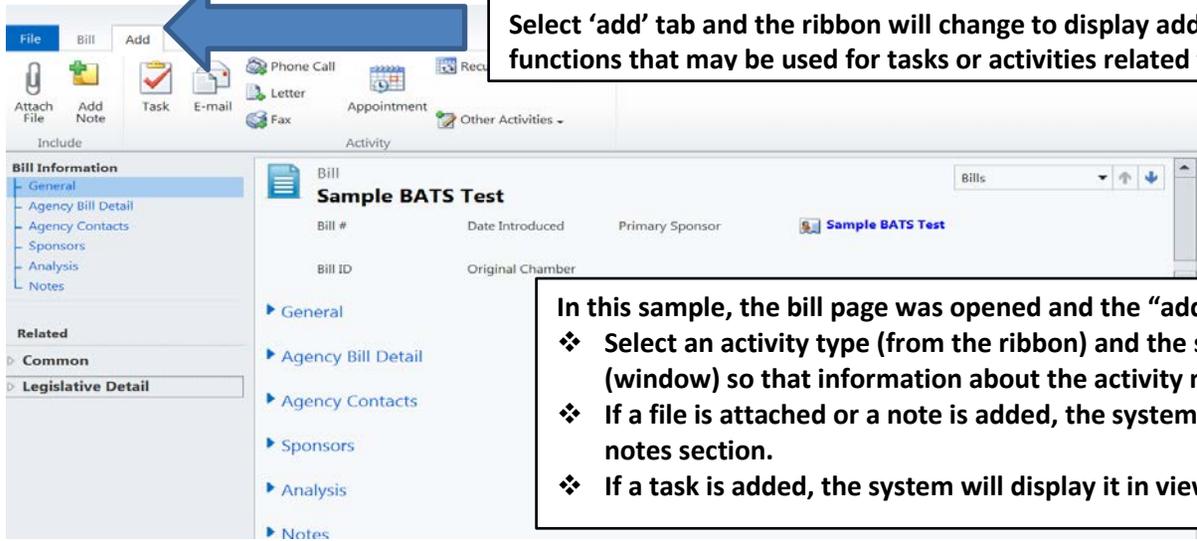
Activities may be used to create or manage actions (tasks or assignments) such as notes, e-mail, phone call, letter, fax, or appointment.

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.



Select 'add' tab and the ribbon will change to display additional functions that may be used for tasks or activities related to a bill.

In this sample, the bill page was opened and the "add" tab was selected from the ribbon.

- ❖ Select an activity type (from the ribbon) and the system will open a new page (window) so that information about the activity may be input.
- ❖ If a file is attached or a note is added, the system will display it on the bill page in the notes section.
- ❖ If a task is added, the system will display it in views associated with the bill activities.

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).

The screenshot shows the Microsoft Dynamics CRM interface for a bill titled "Sample BATS Test". The left-hand navigation pane has "Related Bills" selected. The main area shows the "Related Bills" section with a dropdown menu open, displaying "Active Related Bills" as the selected view. Below the dropdown, a message states "No Related Bill records are available in this view." A text box on the right contains the following text:

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

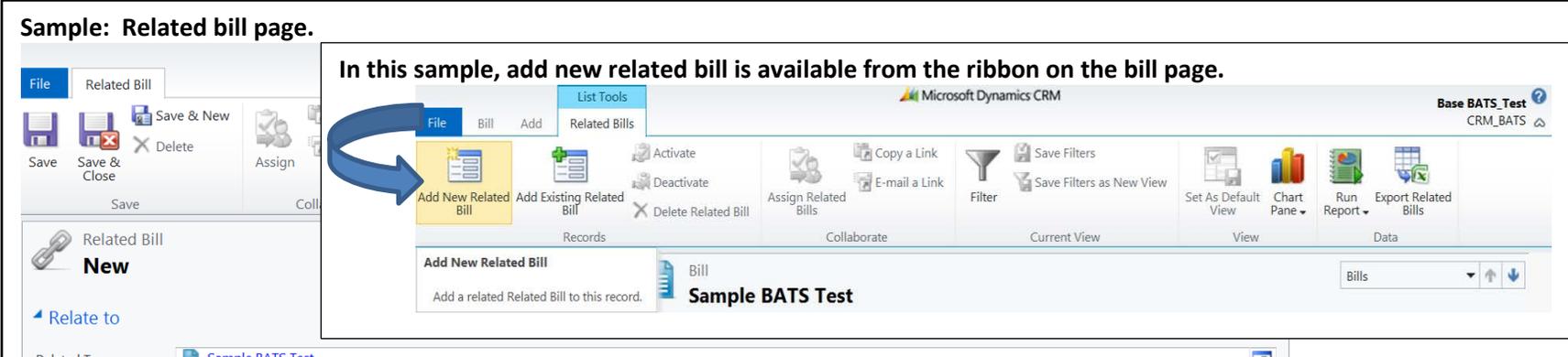
Bill Tracking – Related Bills (continued)

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.

The screenshot displays the Microsoft Dynamics CRM interface for a bill page. The left-hand navigation pane is expanded to show 'Legislative Detail', with 'Bill History' selected. The main content area shows a table titled 'Bill History' with columns for 'Action Date', 'Bill Status', and 'Action Description'. A dropdown menu is open over the table, showing 'Legislative Bill Activity Log Associated View'. A blue arrow points to this dropdown, and a callout box explains that this view is displayed and that the dropdown can be used to change views if needed.

In this sample, the 'Legislative Bill Activity Log Associated View' is displayed.
❖ Use the dropdown to change views if needed.

Display (View) Bill Hearings

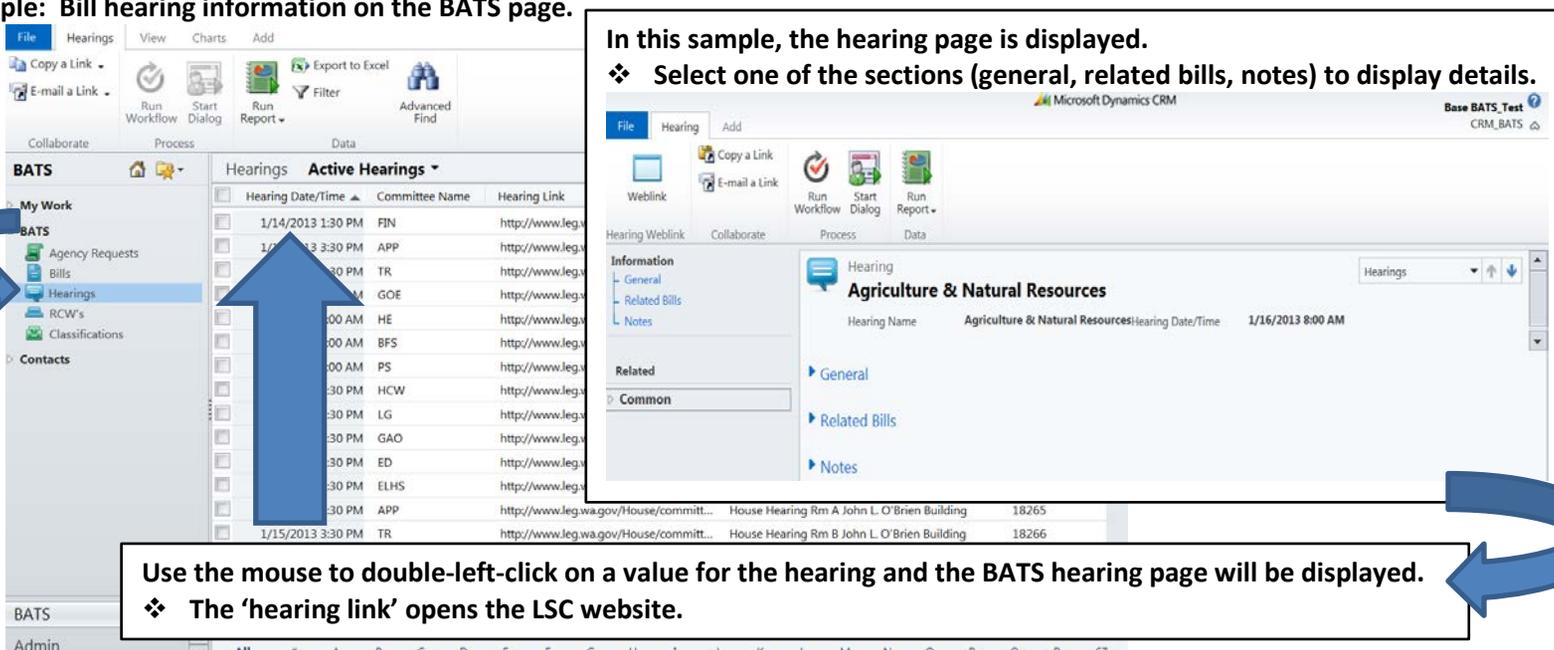
Bill hearing information is available from the BATS tab in the left-side navigation pane.

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.

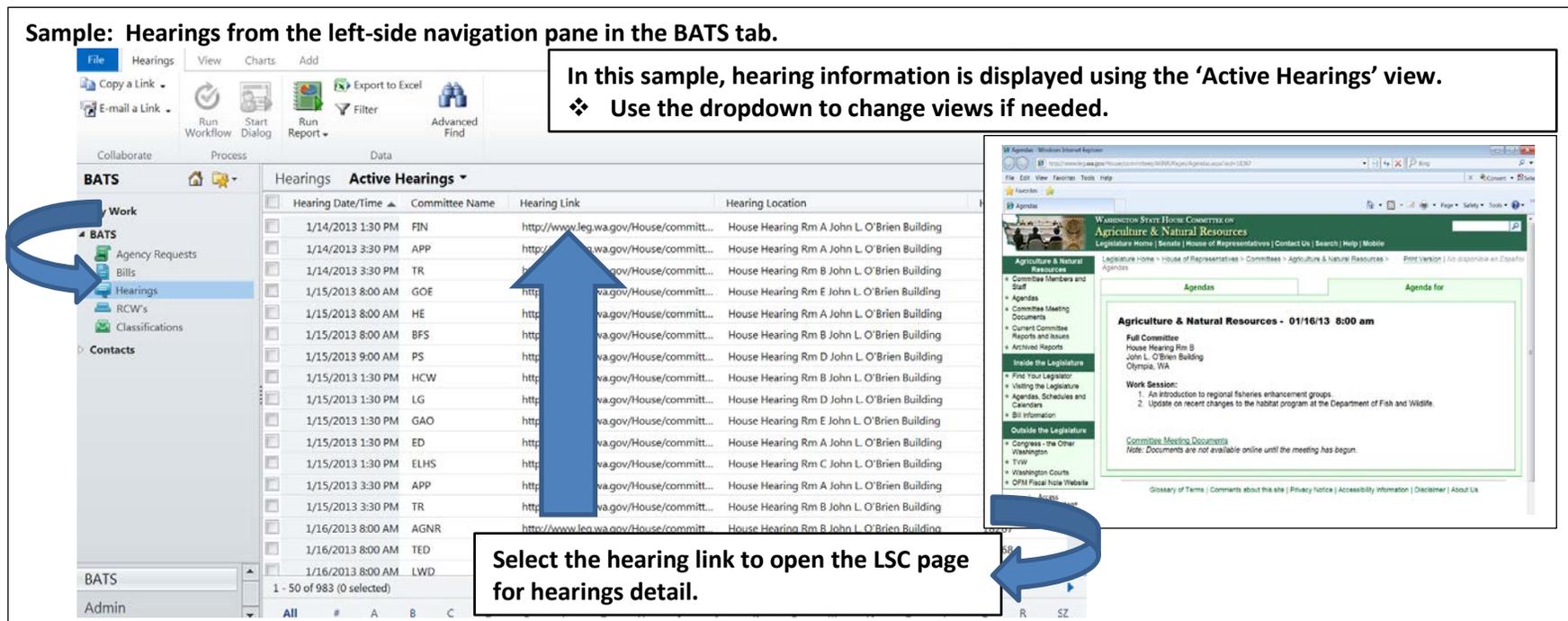
| Hearing | Date/Time | Committee Name | Hearing Link |
|---------|-------------------|----------------|--|
| | 1/14/2013 1:30 PM | FIN | http://www.leg.wa.gov/House/committ... |
| | 1/14/2013 3:30 PM | APP | http://www.leg.wa.gov/House/committ... |
| | 1/14/2013 3:30 PM | TR | http://www.leg.wa.gov/House/committ... |
| | 1/14/2013 3:30 PM | GOE | http://www.leg.wa.gov/House/committ... |
| | 1/14/2013 8:00 AM | HE | http://www.leg.wa.gov/House/committ... |
| | 1/14/2013 8:00 AM | BFS | http://www.leg.wa.gov/House/committ... |
| | 1/14/2013 8:00 AM | PS | http://www.leg.wa.gov/House/committ... |
| | 1/14/2013 3:30 PM | HCW | http://www.leg.wa.gov/House/committ... |
| | 1/14/2013 3:30 PM | LG | http://www.leg.wa.gov/House/committ... |
| | 1/14/2013 3:30 PM | GAO | http://www.leg.wa.gov/House/committ... |
| | 1/14/2013 3:30 PM | ED | http://www.leg.wa.gov/House/committ... |
| | 1/14/2013 3:30 PM | ELHS | http://www.leg.wa.gov/House/committ... |
| | 1/15/2013 3:30 PM | APP | http://www.leg.wa.gov/House/committ... |
| | 1/15/2013 3:30 PM | TR | http://www.leg.wa.gov/House/committ... |

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.



In this sample, hearing information is displayed using the 'Active Hearings' view.
❖ Use the dropdown to change views if needed.

| Hearing Date/Time | Committee Name | Hearing Link | Hearing Location |
|-------------------|----------------|---|---|
| 1/14/2013 1:30 PM | FIN | http://www.leg.wa.gov/House/committ... | House Hearing Rm A John L. O'Brien Building |
| 1/14/2013 3:30 PM | APP | http://www.leg.wa.gov/House/committ... | House Hearing Rm A John L. O'Brien Building |
| 1/14/2013 3:30 PM | TR | http://www.leg.wa.gov/House/committ... | House Hearing Rm B John L. O'Brien Building |
| 1/15/2013 8:00 AM | GOE | http://www.leg.wa.gov/House/committ... | House Hearing Rm E John L. O'Brien Building |
| 1/15/2013 8:00 AM | HE | http://www.leg.wa.gov/House/committ... | House Hearing Rm A John L. O'Brien Building |
| 1/15/2013 8:00 AM | BFS | http://www.leg.wa.gov/House/committ... | House Hearing Rm B John L. O'Brien Building |
| 1/15/2013 9:00 AM | PS | http://www.leg.wa.gov/House/committ... | House Hearing Rm D John L. O'Brien Building |
| 1/15/2013 1:30 PM | HCW | http://www.leg.wa.gov/House/committ... | House Hearing Rm B John L. O'Brien Building |
| 1/15/2013 1:30 PM | LG | http://www.leg.wa.gov/House/committ... | House Hearing Rm D John L. O'Brien Building |
| 1/15/2013 1:30 PM | GAO | http://www.leg.wa.gov/House/committ... | House Hearing Rm E John L. O'Brien Building |
| 1/15/2013 1:30 PM | ED | http://www.leg.wa.gov/House/committ... | House Hearing Rm A John L. O'Brien Building |
| 1/15/2013 1:30 PM | ELHS | http://www.leg.wa.gov/House/committ... | House Hearing Rm C John L. O'Brien Building |
| 1/15/2013 3:30 PM | APP | http://www.leg.wa.gov/House/committ... | House Hearing Rm A John L. O'Brien Building |
| 1/15/2013 3:30 PM | TR | http://www.leg.wa.gov/House/committ... | House Hearing Rm B John L. O'Brien Building |
| 1/16/2013 8:00 AM | AGNR | http://www.leg.wa.gov/House/committ... | House Hearing Rm B John L. O'Brien Building |
| 1/16/2013 8:00 AM | TEO | http://www.leg.wa.gov/House/committ... | House Hearing Rm B John L. O'Brien Building |
| 1/16/2013 8:00 AM | LWD | http://www.leg.wa.gov/House/committ... | House Hearing Rm B John L. O'Brien Building |

Select the hearing link to open the LSC page for hearings detail.

Display (View) RCW's

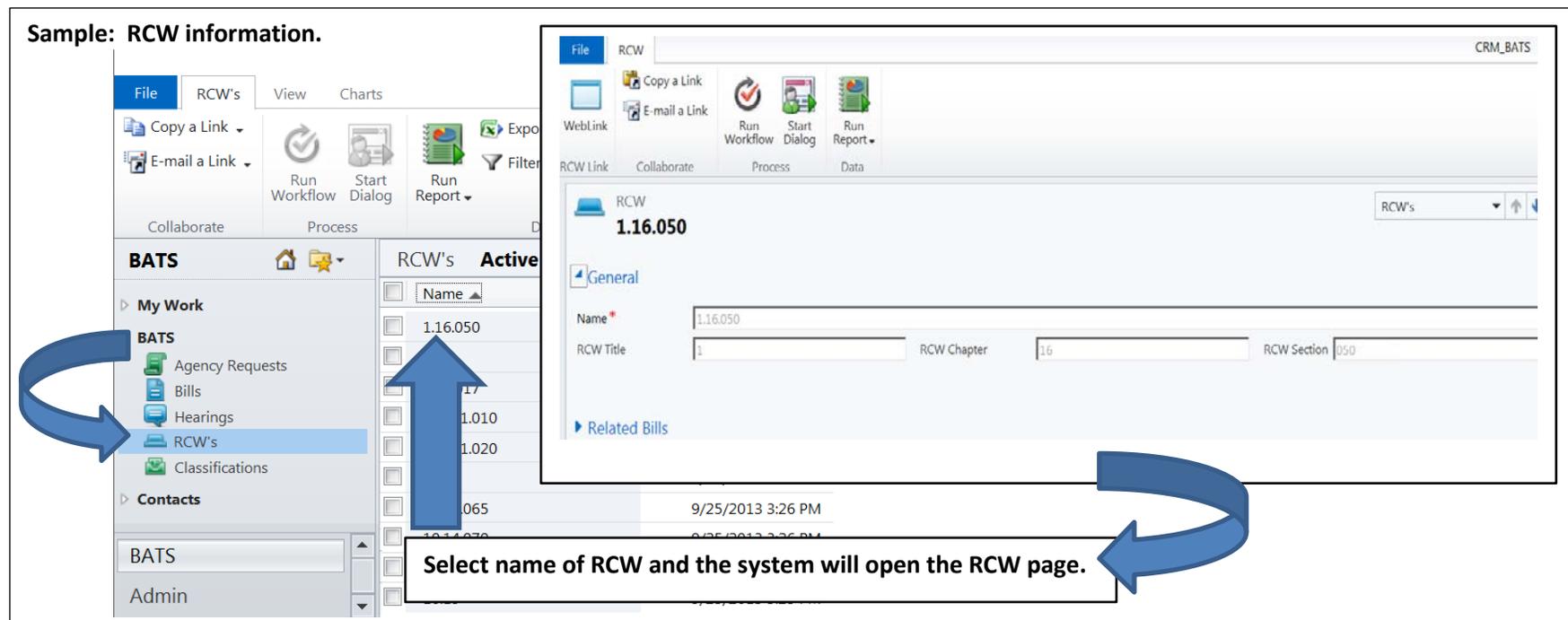
Revised Code of Washington (RCW) information is available from the BATS tab in the left-side navigation pane.

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.



The screenshot shows the BATS application interface. On the left, the navigation pane is open to the 'BATS' section, with 'RCW's' selected. The main content area displays the details for RCW 1.16.050. The 'General' tab is active, showing the RCW Name as '1.16.050', the RCW Title as '1', the RCW Chapter as '16', and the RCW Section as '050'. A text box with arrows points to the RCW number in the list and the RCW page, with the instruction: "Select name of RCW and the system will open the RCW page."

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.

The screenshot shows the Microsoft Dynamics CRM interface. On the left, the 'WebLink' ribbon is highlighted with a blue arrow. A callout box points to the 'WebLink' button with the text: 'Select WebLink (RCW Link) from the ribbon and the system will open the LSC website with RCW information.' Below the ribbon, the 'WebLink' form is visible, showing the 'Name' field with the value '1.16.050' and the 'RCW Title' field with the value '1'. On the right, a browser window displays the Washington State Legislature website. The page title is 'RCW 1.16.050: "Legal holidays and legislatively recognized days."' and the URL is 'http://apps.leg.wa.gov/rcw/default.aspx?cite=1.16.050'. The website content includes the Washington State Legislature logo, navigation links, and a sidebar with 'Inside the Legislature' and 'Outside the Legislature' sections. The main content area displays the title 'RCW 1.16.050 "Legal holidays and legislatively recognized days."' and a 'CHANGE IN 2013' notice. The text below the notice lists legal holidays for 2013.

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.

The image shows a screenshot of the Microsoft Dynamics CRM interface. On the left, the 'Bill Information' pane is visible, with 'General' selected. The main area displays 'Sample BATS Test' with fields for 'Bill #', 'Date Introduced', 'Bill ID', and 'Original Chamber'. A ribbon at the top contains several buttons, including 'Search for Fiscal Notes'. A blue arrow points from this button to a browser window on the right. The browser window shows the URL 'https://fortress.wa.gov/ofm/finpublic/legsearch.aspx?BillNumber=' and the OFM website header 'Office of Financial Management State of Washington Fiscal Notes'. Below the header, there is a search bar and a message: 'Number of Records Found: 0 No results match your search criteria.' Another blue arrow points from the browser window back to the 'Search for Fiscal Notes' button in the CRM ribbon.

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.



The screenshot shows the Microsoft Dynamics CRM interface. The ribbon is set to 'Bill', and the 'LSC Website' button is highlighted with a blue arrow. A text box explains that 'search for fiscal notes' is selected from the ribbon, leading to the OFM website. An inset browser window shows the Washington State Legislature website with a search bar for bills.

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

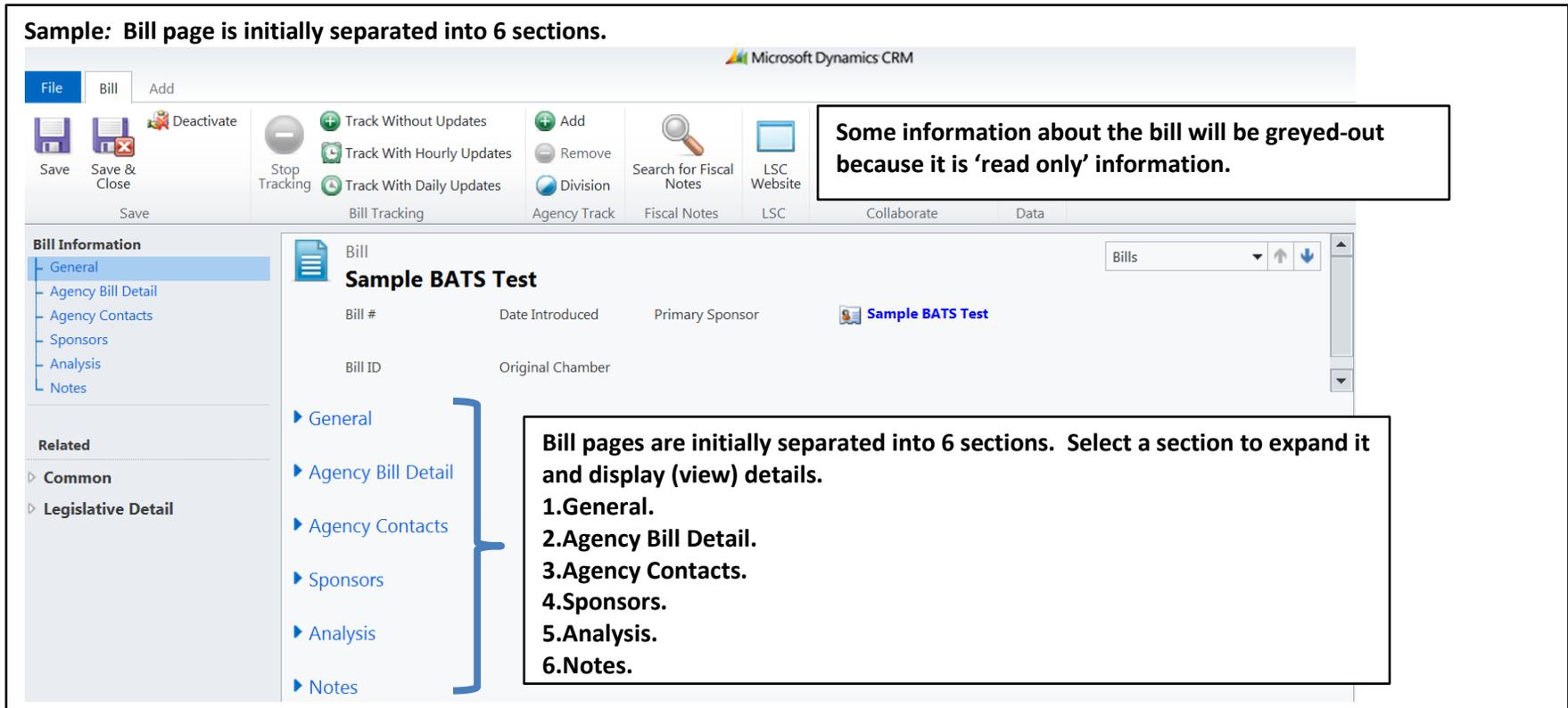
The Bill Analysis and Tracking System (BATS) provides flexible tracking, reporting, and analysis methods from bill origin through the legislative process.

- ❖ 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.



Microsoft Dynamics CRM

File Bill Add

Save Save & Close Deactivate Stop Tracking Track Without Updates Track With Hourly Updates Track With Daily Updates Add Remove Search for Fiscal Notes LSC Website

Save Bill Tracking Agency Track Fiscal Notes LSC Collaborate Data

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

Bill Information

- General
- Agency Bill Detail
- Agency Contacts
- Sponsors
- Analysis
- Notes

Related

- Common
- Legislative Detail

Bill

Sample BATS Test

Bill # Date Introduced Primary Sponsor  Sample BATS Test

Bill ID Original Chamber

▶ General
 ▶ Agency Bill Detail
 ▶ Agency Contacts
 ▶ Sponsors
 ▶ Analysis
 ▶ Notes

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). <ul style="list-style-type: none"> ❖ Add agency bill detail (agency short title and priority). ❖ Connect agency contacts and sponsors. | Starting point for preparing agency analysis. <ul style="list-style-type: none"> ❖ 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). <ul style="list-style-type: none"> ❖ Add new analysis. ❖ Assign preparer for analysis. ❖ Assign reviewers for analysis. | Starting point for preparing analysis details. <ul style="list-style-type: none"> ❖ 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). <ul style="list-style-type: none"> ❖ 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. <ul style="list-style-type: none"> ❖ 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). <ul style="list-style-type: none"> ❖ Select ‘generate summary’. ❖ Review analysis. ❖ Update analysis (if needed). ❖ Select ‘mark complete’ (reviewer task status). | Starting point for reviewing analysis details. <ul style="list-style-type: none"> ❖ 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). <ul style="list-style-type: none"> ❖ Select ‘complete’ (all reviews complete). ❖ Add notes. ❖ Add agency bill detail (agency position). | Starting point for completing agency analysis. <ul style="list-style-type: none"> ❖ 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.

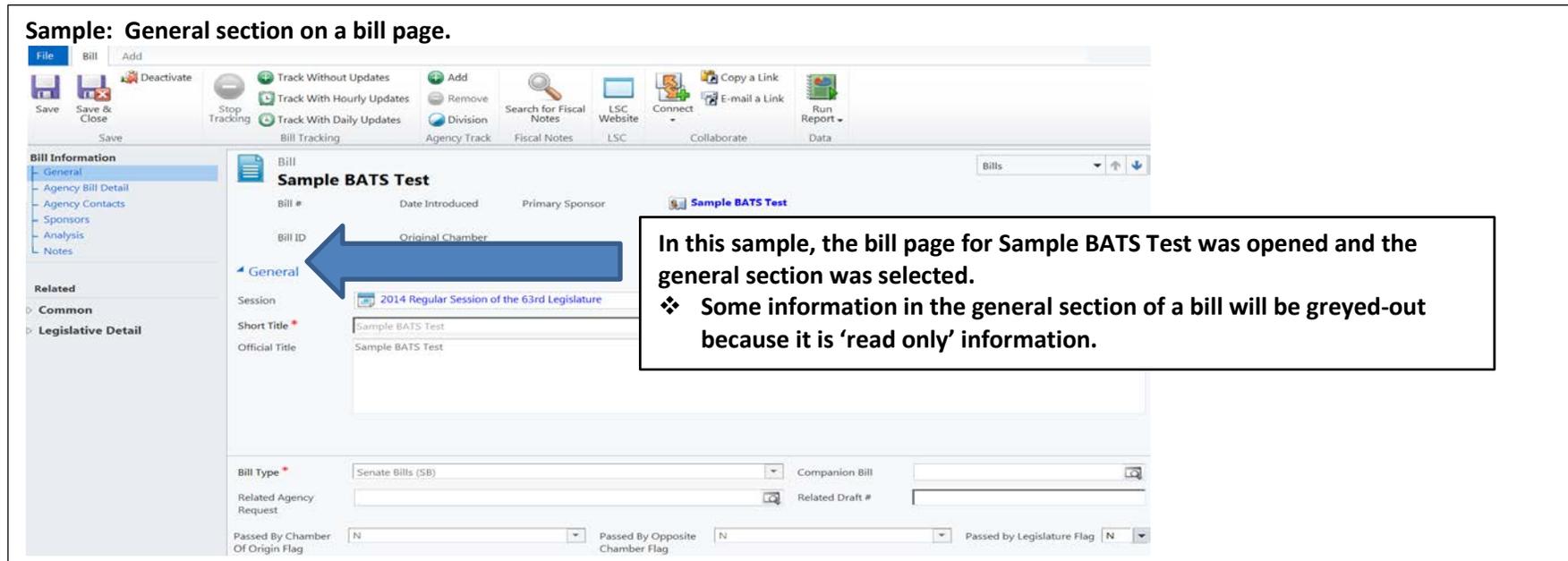
❖ Some information in the general section of a bill will be greyed-out because it is ‘read only’ information.

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.



The screenshot displays the BATS interface for a bill titled "Sample BATS Test". The left-hand navigation pane shows "General" selected. A blue arrow points to this selection. A text box on the right states: "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." The main content area shows fields for "Session" (2014 Regular Session of the 63rd Legislature), "Short Title" (Sample BATS Test), and "Official Title" (Sample BATS Test). At the bottom, there are dropdown menus for "Bill Type" (Senate Bills (SB)), "Passed By Chamber Of Origin Flag" (N), "Passed By Opposite Chamber Flag" (N), and "Passed by Legislature Flag" (N).

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.

The screenshot displays the Microsoft Dynamics CRM interface for a bill record titled "Sample BATS Test". The ribbon is currently set to "Agency Bill Details", and the "Add New Agency Bill Detail" button is highlighted with a blue arrow. The left navigation pane shows the "Agency Bill Detail" section selected, also indicated by a blue arrow. A text box with a black border contains the following text: "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." Below this text box, another blue arrow points to the "Add New Agency Bill Detail" button on the ribbon. The main content area shows a table with columns for "Agency Short Title", "Agency Priority", and "Agency Position", and a message stating "No Agency Bill Detail records are available in this view." The status bar at the bottom indicates "0 - 0 of 0 (0 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.

Input information about the agency bill details.
❖ Agency Short Title is sometimes referred to as the agency “nickname” for the bill.

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.

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.

The screenshot displays the Microsoft Dynamics CRM interface for a bill titled "Sample BATS Test". The left-hand navigation pane shows the "Agency Contacts" section selected. The ribbon at the top includes a "Connect" button, which is highlighted with a blue arrow. A text box on the right side of the screenshot contains the following text: "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." Below the text box, another blue arrow points to the "Connect" button on the ribbon.

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.

Input name of contact.
❖ Use Look Up to search for name.

Use the dropdown list to select Position.

Input value for 'as this role'.
❖ Use Look Up to search for role.

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

Look Up Record
Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Connection Role
View: Connection Role Lookup View

| Name | Connection Role Category | Status |
|---|--------------------------|--------|
| <input checked="" type="checkbox"/> Subject Matter Expert | Business | Active |
| <input type="checkbox"/> Analysis Contact | Business | Active |
| <input type="checkbox"/> Stakeholder | Business | Active |

1 - 3 of 3 (1 selected) Page 1

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.

The screenshot displays the Microsoft Dynamics CRM interface for a bill titled "Sample BATS Test". The ribbon is set to "Connections", and the "Connect" button is highlighted with a blue arrow. The left navigation pane shows "Sponsors" selected. A text box explains that the "Connect" function is not displayed on the ribbon if the sponsors section is not selected.

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.

Input name of sponsor.
❖ Use Look Up to search for name.

Use the dropdown list to select Position.

Input value for 'as this role'.
❖ Use Look Up to search for role.

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

Look Up Record
Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Connection Role
View: Connection Role Lookup View

| Name | Connection Role Category | Status |
|---|--------------------------|--------|
| <input checked="" type="checkbox"/> Subject Matter Expert | Business | Active |
| <input type="checkbox"/> Analysis Contact | Business | Active |
| <input type="checkbox"/> Stakeholder | Business | Active |

1 - 3 of 3 (1 selected) Page 1

Properties New OK Cancel Remove Value

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.

The screenshot shows the Microsoft Dynamics CRM interface for a bill titled "Sample BATS Test". The left navigation pane has "Analysis" selected. The ribbon shows the "Analysis" tab, but the "Add New Analysis" button is not visible. A text box with a blue arrow pointing to the ribbon states: "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." Below the ribbon, a table lists the analysis records.

| Analysis Name | Lead Analysis? | Preparer Due Date | Recommended Position | Analysis Status | Reviewer 1 Status |
|-------------------------------|----------------|-------------------|----------------------|-----------------|-------------------|
| Sample Analysis for BATS Test | No | | Support | Assigned | Not assigned |

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.

The screenshot shows the Microsoft Dynamics CRM interface for the 'Base BATS_Test' entity. The ribbon includes 'File', 'Analysis', and 'Add' tabs. The 'Analysis' ribbon has several groups: 'Save' (Save, Save & Close, Delete), 'Summary' (Generate Summary), 'Status' (Start Analysis, Ready for Review), and 'Collaborate' (Assign, Copy a Link, E-mail a Link). The left navigation pane shows 'Agency Analysis' with sub-items: General, Assignments, Analysis Details, Review Task Details, and Notes. The main content area displays 'Sample Analysis for BATS Test' with a 'Bill ID' field and a list of sections: General, Assignments, Analysis Details, Review Task Details, and Notes. A callout box points to these sections with the text: 'Analysis page is initially separated into 5 sections. 1.General. 2.Assignments. 3.Analysis Details. 4.Review Task Details. 5.Notes.'

Prepare Bill Analysis Details – Assign Preparer

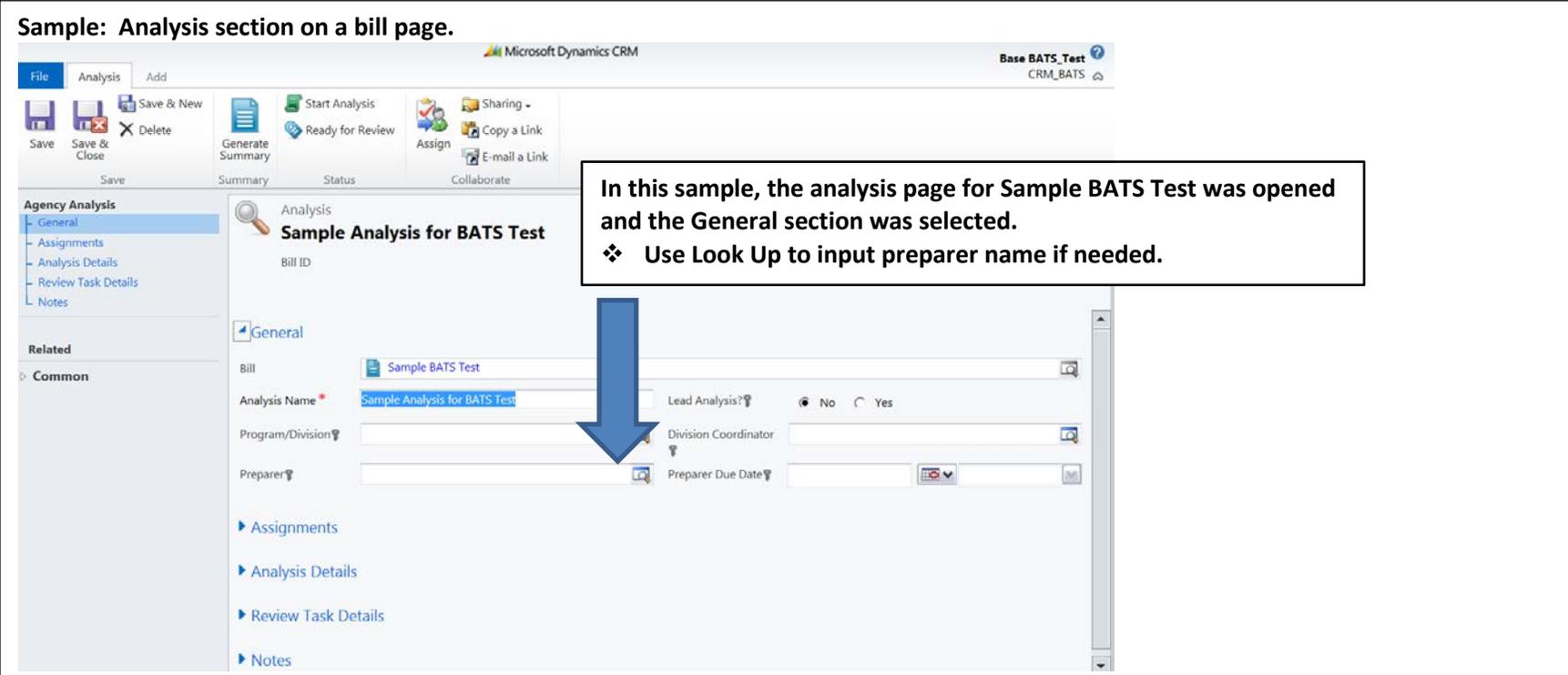
The preparer for analysis is the person who will provide analysis details.

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.

Analysis
Sample Analysis for BATS Test
Bill ID

Assignments

Reviewer

| | |
|--------------|--|
| Not assigned | |

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).

Analysis
Sample Analysis for BATS Test
Bill ID

General

Assignments

| Reviewer | Status | Due Date |
|----------------|--------------|----------|
| Base BATS_Test | Not assigned | |
| | Not assigned | |

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.

The screenshot displays the Microsoft Dynamics CRM interface for a bill titled "Sample BATS Test". The "Analysis" ribbon is active, showing options like "Start Analysis", "Ready for Review", "Assign", "Copy a Link", and "E-mail a Link". A blue arrow points to the "Start Analysis" button. An inset window shows the "Start Analysis" dialog box with the text "Begin the Analysis Process (Q&A)" and a "Test" button. Below the main interface, a table lists analysis details:

| Analysis Name | Lead Analysis? | Preparer Due Date |
|-------------------------------|----------------|-------------------|
| Sample Analysis for BATS Test | No | |

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.

The image shows three screenshots of the 'Analysis Details -- Webpage Dialog' window. The top-left screenshot shows the 'Analysis Details' section with a text input area for a 'Brief Summary/Purpose'. A callout box points to the 'Next' button at the bottom, stating: "Select 'Next' to continue to the next question for analysis." The top-right screenshot shows the 'Analysis' ribbon with the 'Start Analysis' button highlighted. A callout box points to this button, stating: "Select 'start analysis' to input new analysis details." The bottom-right screenshot shows the 'Analysis Details' section with a message: "This is the end of the dialog. Click Finish to...". A callout box points to the 'Finish' button, stating: "Select 'Finish' to complete the analysis and return to the analysis section." The 'Next' button is visible in the top-left screenshot, and the 'Finish' button is visible in the bottom-right screenshot.

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.

The screenshot displays the Microsoft Dynamics CRM interface for the 'Base BATS_Test' record. The 'Analysis' ribbon is active, showing options like 'Start Analysis', 'Ready for Review', and 'Generate Summary'. The left navigation pane shows 'Agency Analysis' with 'Analysis Details' selected. The main content area shows the 'Analysis Details' section for 'Sample Analysis for BATS Test'. The text in this section is formatted with bold text and bullet points. A callout box with a blue arrow points to the text, stating: 'In this sample, the information was edited and formatted using bullets and bold text.'

Sample analysis using **Start Analysis** from the ribbon.

- Use **Start Analysis** to input new analysis information. The system will prompt for information using a question/answer format.
- After the analysis is input, it may be edited/formatted from the analysis details section 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.

The screenshot displays the Microsoft Dynamics CRM interface for an analysis page titled 'Sample Analysis for BATS Test'. The left-hand navigation pane shows the 'Review Task Details' section selected. A callout box with a black border contains the text: 'In this sample, the review task details section was selected. ❖ The add review entry function will not be displayed on the ribbon if the review task details section is not selected.' A table at the bottom of the page lists reviewer information.

| Reviewer Name | Reviewer Title/Purpose | Due Date | Activity Status | Actual End |
|----------------|------------------------|----------|-----------------|------------|
| Base BATS_Test | Analyst | | Open | |
| Base BATS_Test | Reviewer | | Open | |

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.

The screenshot shows the Microsoft Dynamics CRM interface for the 'Review Entry' page. The ribbon is set to 'Review Entry' and the 'Add to Queue' option is selected. A blue arrow points from the 'Add to Queue' button to a callout box. The callout box contains the following text:

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.

The main form area shows the 'Information' section with the 'General' tab selected. The 'Owner' is 'Base BATS_Test'. The 'Reviewer Name' is 'Base BATS_Test'. The 'Reviewer Title/Purpose' is 'Analyst'. The 'Due Date' and 'Reviewed Date and Time' fields are empty.

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

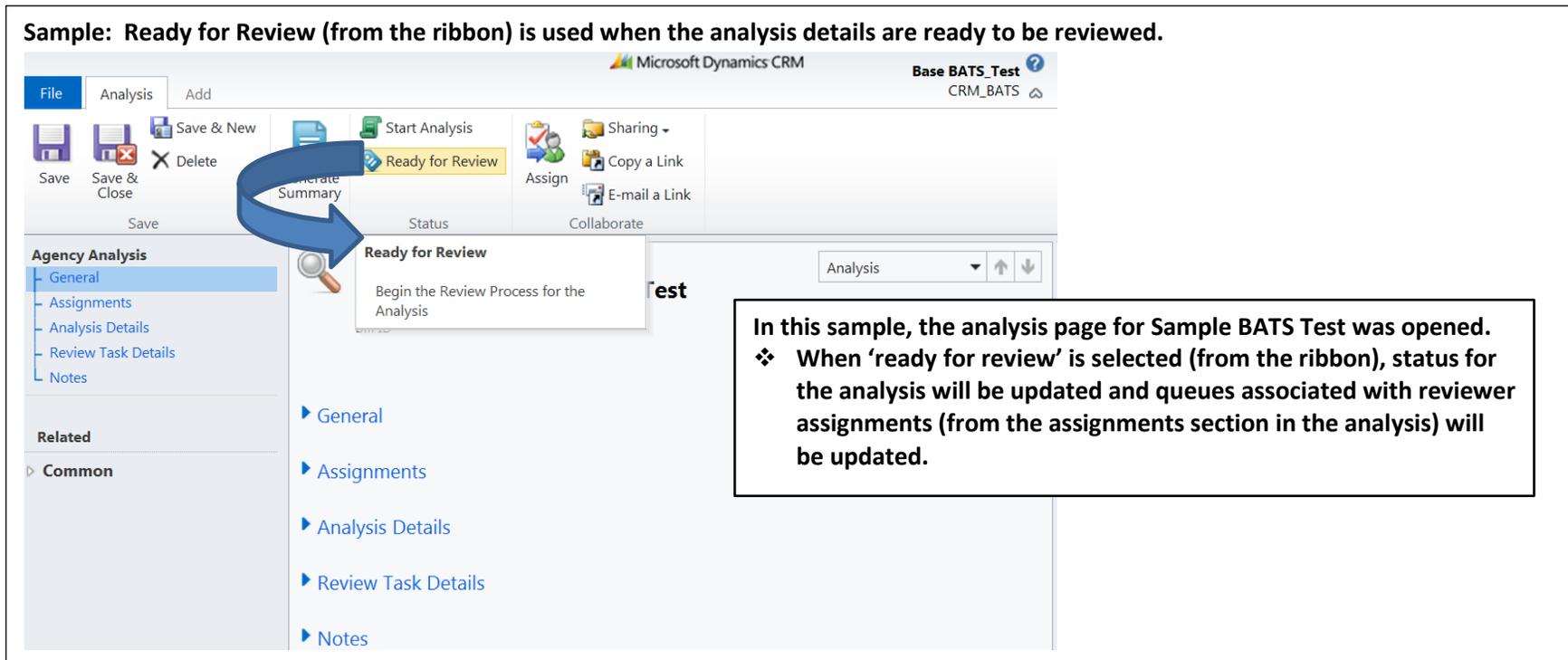
Ready for Review (from the ribbon) is used when the analysis details are ready to be reviewed.

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.



The screenshot displays the Microsoft Dynamics CRM interface for a 'Base BATS_Test' record. The ribbon is set to 'Analysis', and the 'Ready for Review' button is highlighted. A blue arrow points from this button to a tooltip that reads 'Ready for Review' and 'Begin the Review Process for the Analysis'. The left-hand navigation pane shows the 'Agency Analysis' section with sub-items: General, Assignments, Analysis Details, Review Task Details, and Notes. Below this, a 'Related' section shows a 'Common' link. A text box on the right side of the screenshot contains the following text:

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

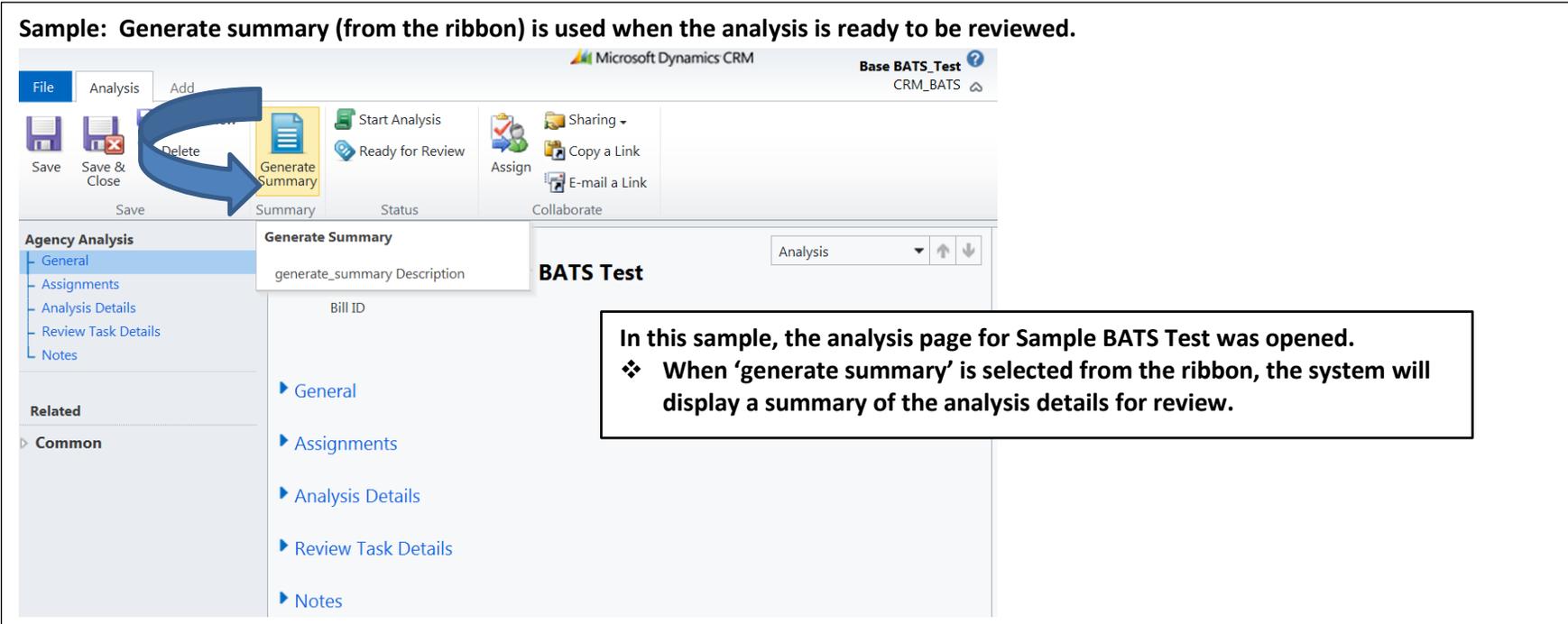
Generate Summary (from the ribbon) is used when the agency reviewers are ready to review the analysis details.

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.



Microsoft Dynamics CRM
Base BATS_Test
CRM_BATS

File Analysis Add
Save Save & Close Delete
Generate Summary Start Analysis Ready for Review Assign Sharing Copy a Link E-mail a Link
Summary Status Collaborate

Agency Analysis
General
Assignments
Analysis Details
Review Task Details
Notes

Related
Common

Generate Summary
generate_summary Description
BATS Test
Bill ID
Analysis

General
Assignments
Analysis Details
Review Task Details
Notes

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

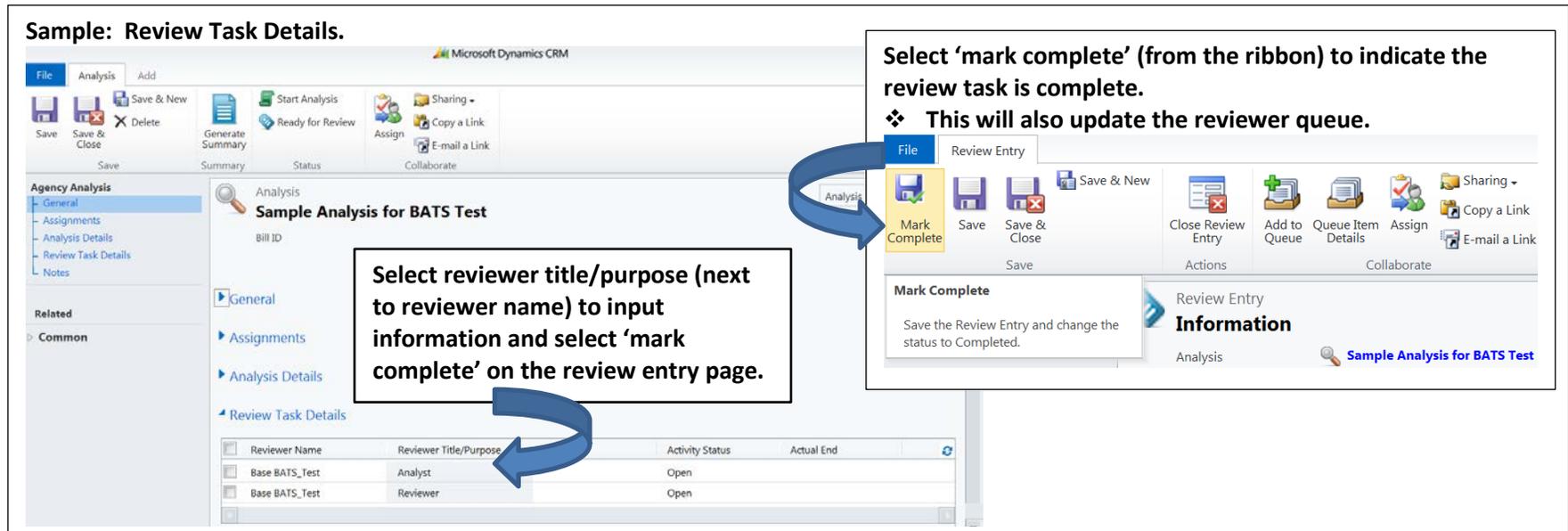
When each review task is complete, the task may be updated on the analysis to indicate the assigned task (review) is complete.

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.



Select 'mark complete' (from the ribbon) to indicate the review task is complete.
❖ This will also update the reviewer queue.

Select reviewer title/purpose (next to reviewer name) to input information and select 'mark complete' on the review entry page.

| Reviewer Name | Reviewer Title/Purpose | Activity Status | Actual End |
|----------------|------------------------|-----------------|------------|
| Base BATS_Test | Analyst | Open | |
| Base BATS_Test | Reviewer | Open | |

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.

Close Review Entry
You have selected 1 Review Entry to close.

Select the status of the closing Review Entry.

Status:

Completed
Completed
Canceled
Canceled

OK Cancel

Complete Bill Analysis Details – Complete Review Tasks

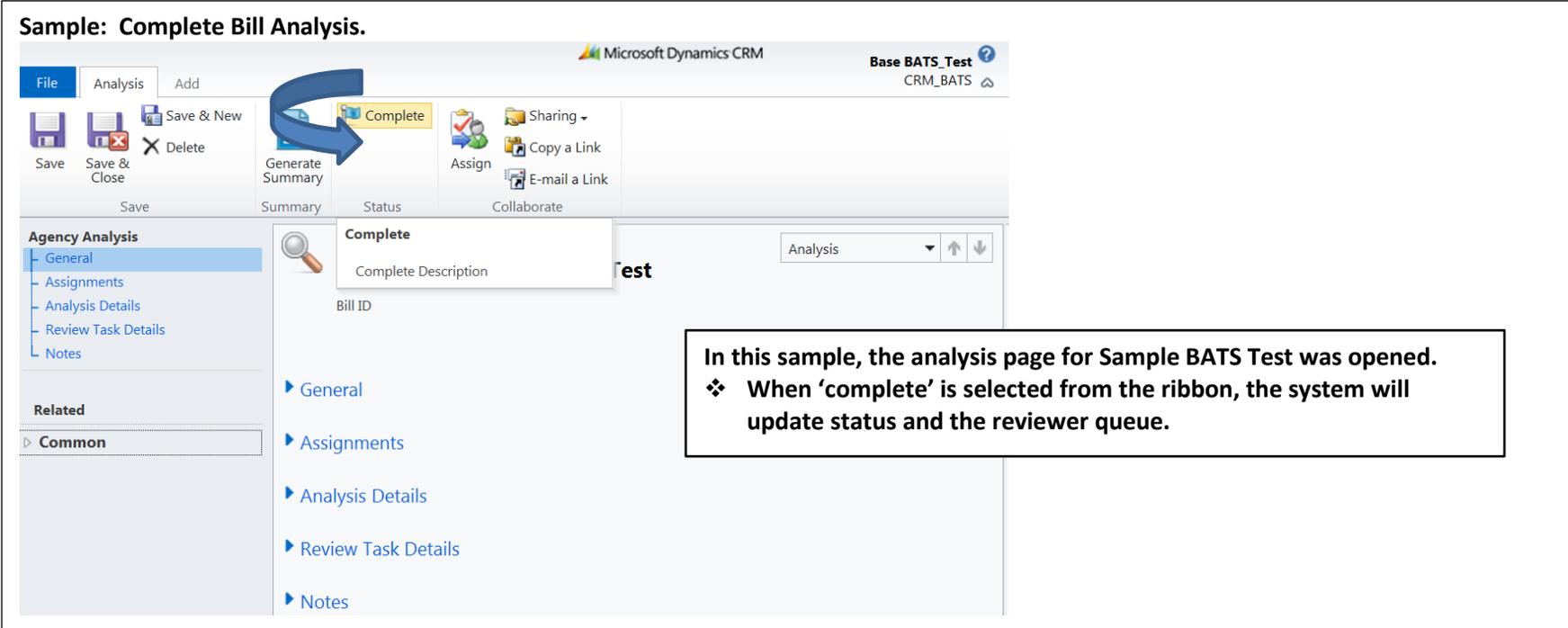
When all review tasks are complete for an analysis, the analysis may be updated to indicate the review cycle is complete (this step is usually completed by the agency coordinator).

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.



The screenshot displays the Microsoft Dynamics CRM interface for the 'Base BATS_Test' record. The ribbon is set to 'Analysis', and the 'Complete' button is highlighted in yellow. A blue arrow points to this button. The left-hand navigation pane shows 'Agency Analysis' with sub-items: General, Assignments, Analysis Details, Review Task Details, and Notes. The main content area shows the 'Complete' button and a 'Complete Description' field. A text box on the right states: '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.

The screenshot displays the Microsoft Dynamics CRM interface for the 'Sample BATS Test' bill. The left navigation pane shows the 'Notes' section selected. The main content area shows the 'Attach File' button and a 'Done' button. A text box with a blue arrow pointing to the 'Notes' link in the navigation pane and another blue arrow pointing to the 'Attach File' button contains the following text:

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.

| Agency Short Title | Agency Priority | Agency Position |
|---|-----------------|-----------------|
| No Agency Bill Detail records are available in this view. | | |

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