



# **2017 Bill Analysis and Tracking Training**

*Learning BATS and the “new”  
format*

# *Introduction to BATS*

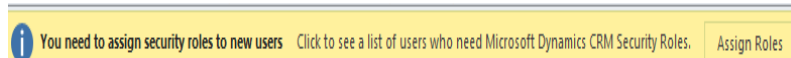
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- Help is available for BATS specific [www.des.wa.gov/services/IT/SystemSupport/Training/Pages/trainingCourseMaterials.aspx](http://www.des.wa.gov/services/IT/SystemSupport/Training/Pages/trainingCourseMaterials.aspx) information:
  - WaTech Solutions Center
    - Phone: (360) 407-9100
    - Email: [solutionscenter@watech.wa.gov](mailto:solutionscenter@watech.wa.gov)
  - Training Environment URL: <https://tr.xcrm.wa.gov/CRMBATS>
  - Production Environment URL: <https://xcrm.wa.gov/crmbats>

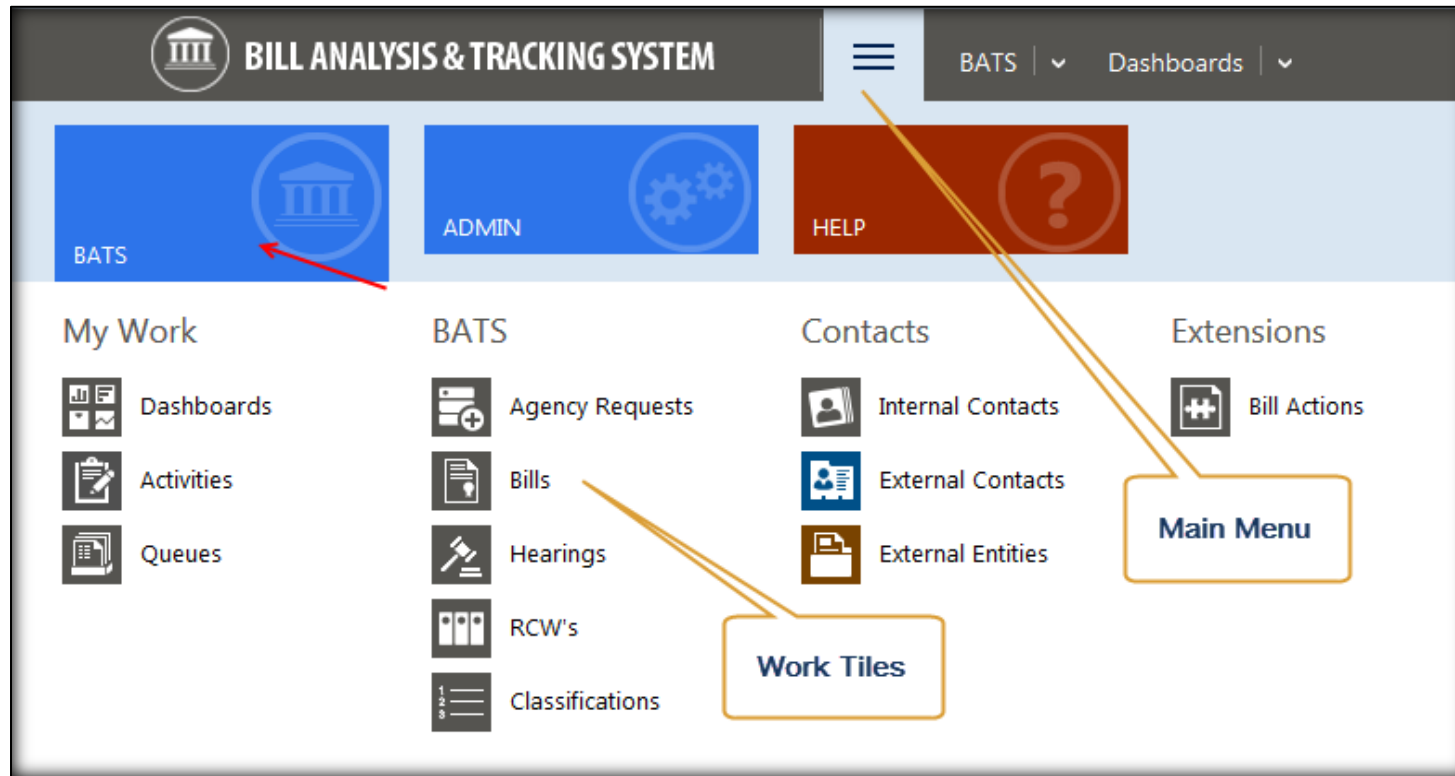


# Layout/Navigation

- If you see the Yellow Ribbon Bar, X out of (you will only need to do this one time)

 You need to assign security roles to new users. Click to see a list of users who need Microsoft Dynamics CRM Security Roles. [Assign Roles](#)

- The dark grey navigation bar provides access to the menus which allows you to perform common tasks quickly.



The screenshot displays the user interface for the BILL ANALYSIS & TRACKING SYSTEM. At the top, a dark grey navigation bar contains the system logo, the title "BILL ANALYSIS & TRACKING SYSTEM", and a hamburger menu icon. Below the navigation bar, a light blue ribbon bar features three main menu items: "BATS" (with a building icon), "ADMIN" (with a gear icon), and "HELP" (with a question mark icon). A red arrow points to the "BATS" icon in the ribbon bar. Below the ribbon bar, the main content area is organized into four columns: "My Work", "BATS", "Contacts", and "Extensions". The "My Work" column includes "Dashboards", "Activities", and "Queues". The "BATS" column includes "Agency Requests", "Bills", "Hearings", "RCW's", and "Classifications". The "Contacts" column includes "Internal Contacts", "External Contacts", and "External Entities". The "Extensions" column includes "Bill Actions". A yellow box labeled "Main Menu" is positioned below the "Extensions" column, with lines pointing to the "BATS" and "ADMIN" icons in the ribbon bar. Another yellow box labeled "Work Tiles" is positioned below the "Bills" tile in the "BATS" column, with a line pointing to the "Bills" tile. In the bottom right corner, there is a circular seal of the State of Washington, featuring a portrait of George Washington and the text "THE SEAL OF THE STATE OF WASHINGTON 1889".

# Contacts

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- **Internal Contacts (USERS)**

An Internal Contact is any person within your agency who will be accessing the system

- **External Contact**

An External Contact is someone not using the system, usually another agency. Legislators have been imported from LSC.

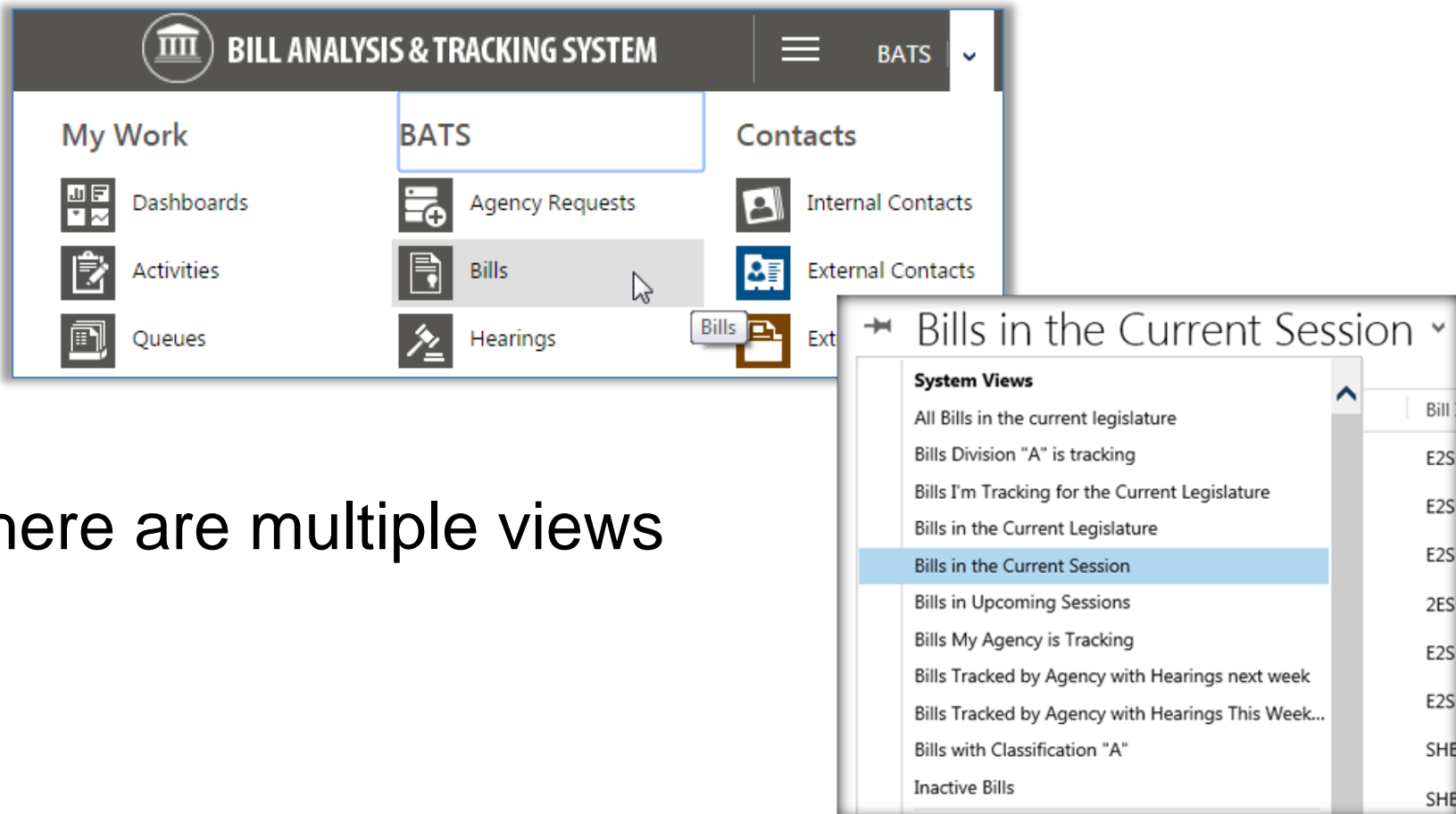
- **External Entities**

External Entities are groups or committees, not a person. This is someone outside of the system. An External Contact can be associated to an External Entity.



# Bill Tracking & Analysis

- “Click Bills” in the Work Tile Ribbon to show Bill Screen



The screenshot displays the BATS (Bill Analysis & Tracking System) interface. The top navigation bar includes the system logo and the text "BILL ANALYSIS & TRACKING SYSTEM". Below this, a ribbon menu is visible with three main sections: "My Work", "BATS", and "Contacts". The "BATS" section is highlighted, and the "Bills" option is selected, indicated by a mouse cursor. The "Bills" option is part of a dropdown menu that also includes "Agency Requests" and "Hearings".

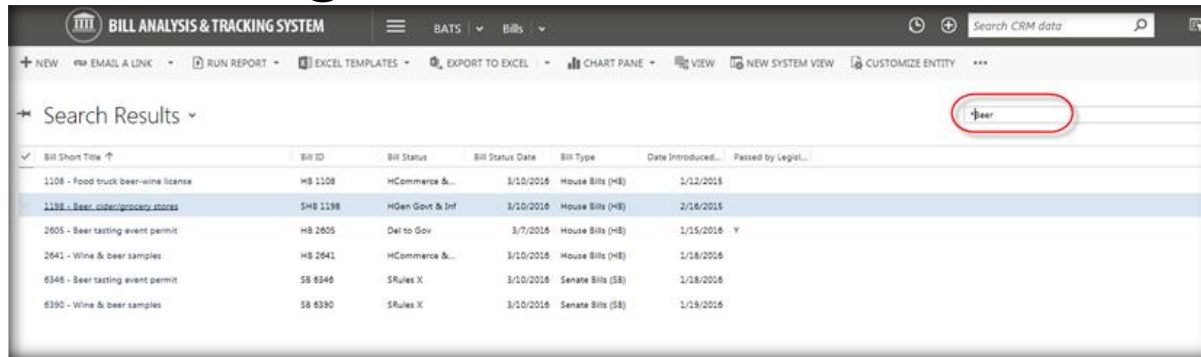
The "Bills in the Current Session" dropdown menu is shown, listing various system views:

- System Views
- All Bills in the current legislature
- Bills Division "A" is tracking
- Bills I'm Tracking for the Current Legislature
- Bills in the Current Legislature
- Bills in the Current Session** (highlighted)
- Bills in Upcoming Sessions
- Bills My Agency is Tracking
- Bills Tracked by Agency with Hearings next week
- Bills Tracked by Agency with Hearings This Week...
- Bills with Classification "A"
- Inactive Bills

- There are multiple views

# Bill Tracking & Analysis

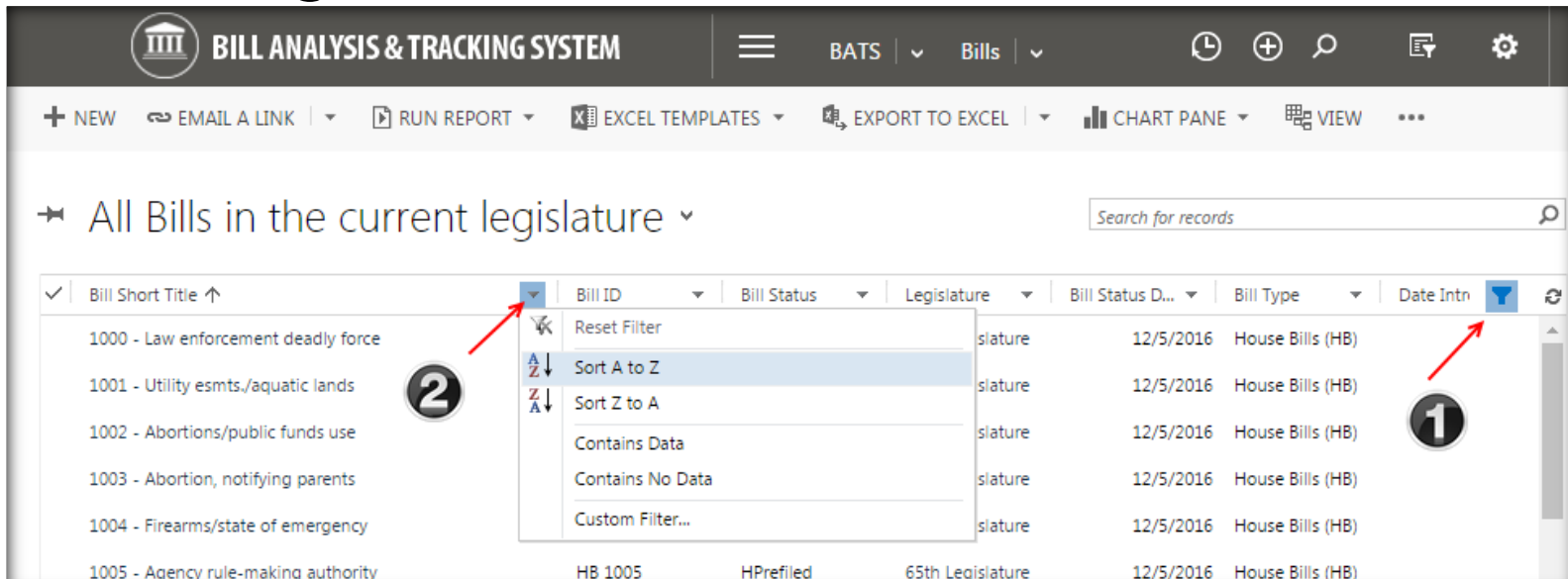
- Searching



The screenshot shows the 'BILL ANALYSIS & TRACKING SYSTEM' interface. A search bar at the top right contains the text 'Beer'. Below the search bar, a table displays search results for bills related to beer. The table has columns for Bill Short Title, Bill ID, Bill Status, Bill Status Date, Bill Type, and Date Introduced. The results include bills such as '1108 - Food truck beer-wine license', '1198 - Beer, cider/grocery stores', '2605 - Beer tasting event permit', '2641 - Wine & beer samples', '6346 - Beer tasting event permit', and '6390 - Wine & beer samples'.

Bill Short Title ↑	Bill ID	Bill Status	Bill Status Date	Bill Type	Date Introduced...	Passed by Legislat...
1108 - Food truck beer-wine license	HB 1108	HCommerce &...	3/10/2016	House Bills (HB)	1/12/2016	
1198 - Beer, cider/grocery stores	SB 1198	HGen Govt & Inf	3/10/2016	House Bills (HB)	2/16/2016	
2605 - Beer tasting event permit	HB 2605	Del to Gov	3/7/2016	House Bills (HB)	1/15/2016	Y
2641 - Wine & beer samples	HB 2641	HCommerce &...	3/10/2016	House Bills (HB)	1/18/2016	
6346 - Beer tasting event permit	SB 6346	SRules X	3/10/2016	Senate Bills (SB)	1/28/2016	
6390 - Wine & beer samples	SB 6390	SRules X	3/10/2016	Senate Bills (SB)	1/19/2016	

- Filtering



The screenshot shows the 'BILL ANALYSIS & TRACKING SYSTEM' interface with a filter menu open. The filter menu is applied to the 'Legislature' column and includes options: 'Reset Filter', 'Sort A to Z', 'Sort Z to A', 'Contains Data', 'Contains No Data', and 'Custom Filter...'. A red arrow points to the 'Sort A to Z' option, and another red arrow points to the 'Date Intrn' column header. A circular badge with the number '2' is next to the 'Sort A to Z' option, and a circular badge with the number '1' is next to the 'Date Intrn' column header. The table below shows a list of bills with columns for Bill Short Title, Bill ID, Bill Status, Legislature, Bill Status D..., Bill Type, and Date Intrn.

Bill Short Title ↑	Bill ID	Bill Status	Legislature	Bill Status D...	Bill Type	Date Intrn
1000 - Law enforcement deadly force			slature	12/5/2016	House Bills (HB)	
1001 - Utility esmts/aquatic lands			slature	12/5/2016	House Bills (HB)	
1002 - Abortions/public funds use			slature	12/5/2016	House Bills (HB)	
1003 - Abortion, notifying parents			slature	12/5/2016	House Bills (HB)	
1004 - Firearms/state of emergency			slature	12/5/2016	House Bills (HB)	
1005 - Agency rule-making authority	HB 1005	HProfiled	65th Legislature	12/5/2016	House Bills (HB)	



# Bill Tracking & Analysis

- Other ways to search and filter

The screenshot displays the 'BILL ANALYSIS & TRACKING SYSTEM' interface. At the top, there is a navigation bar with 'ADMIN', 'Solutions', and a search bar labeled 'Search CRM data'. The user 'Cassandra Pinnix CRM\_BATS' is logged in. Below the navigation bar, there are buttons for 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. The main content area is divided into three sections: 'Search', 'Bills', and 'Queue Items'. The 'Search' section has a search bar containing '1026'. The 'Bills' section shows a list of bills, including '1026 - WA health security trust' and '2219 HB H-1026.1 LOW'. The 'Queue Items' section shows a list of tasks, including 'Assign the Preparer for the 2219 HB H-1026.1' and 'Prepare the Analysis for 1026 HB H-0415.1 HIGH'. A callout box with the text 'You can select a filter' points to a 'FILTER WITH' dropdown menu. The dropdown menu is open, showing options: 'None', 'Internal Contact', 'Bill', 'Analysis', 'Agency Request', 'Queue Item', and 'Stakeholder'.

**BILL ANALYSIS & TRACKING SYSTEM**

ADMIN Solutions Search CRM data Cassandra Pinnix CRM\_BATS

NEW ACTIVITY NEW RECORD IMPORT DATA

**Search**

1026

**Bills**

- 1026 - WA health security trust  
HB 1026  
HPrefiled

**Analysis**

- 1026 HB H-0415.1 HIGH  
Yes  
1/6/2017 5:00 PM
- 2219 HB H-1026.1 LOW  
Yes  
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**Queue Items**

- Assign the Preparer for the 2219 HB H-1026.1  
9a82dd24-03d7-e411-...  
3/30/2015 10:35 AM
- Prepare the Analysis for 1026 HB H-0415.1 HIGH  
6375d617-afc0-e611-...  
12/12/2016 1:08 PM

**Filter with:** None

**Filter options:** None, Internal Contact, Bill, Analysis, Agency Request, Queue Item, Stakeholder



# Bill Elements

- Click on a bill to view the elements on the bill

The screenshot displays the 'BILL ANALYSIS & TRACKING SYSTEM' interface. At the top, there is a navigation bar with a logo on the left and a breadcrumb trail: 'BATS' > 'Bills' > '1000 - Law enforce...'. To the right of the breadcrumb are icons for refresh, zoom in, search, and print. Below the navigation bar is a toolbar with various action buttons: 'SAVE', 'SAVE & CLOSE', 'SEARCH FOR FISCAL NOTES', 'LSC WEBSITE', 'TRACK WITHOUT UPDATES', 'TRACK WITH HOURLY UP...', 'TRACK WITH DAILY UPDA...', 'ADD', and an upward arrow.

The main content area is titled 'BILL : BILL INFORMATION' and shows the bill number '1000 - Law enforcement dea...'. Below this, a table provides key details:

Bill #	1000	Date Introduced	Primary Sponsor
Bill ID	HB 1000	Original Chamber	House

Below the table, a section titled 'General' contains the following information:

- Session: --
- Short Title\*: 1000 - Law enforcement deadly force
- Official Title: AN ACT Relating to the use of deadly force by law enforcement and corrections officers;

At the bottom of the page, there is a section for 'Companion Bill' and 'Passed By Chamber Of Origin Flag'. The companion bill is '5000 - Law enforce...' with a 'Related Draft #' of 'H-0360.1'. The 'Passed By Chamber Of Origin Flag' is '--'. Other flags include 'Passed By Opposite Chamber Flag' (--) and 'Passed by Legislature Flag' (--). There are also 'Tracking Notes' (\*\*\*\*\*), a 'Related Agency Request', and another set of 'Tracking Notes' (\*\*\*\*\*).



# Bill Elements

- Click “LSC Website” in top Ribbon Bar to view webpage associated with this Bill. The webpage will open in a new tab
- Click “Search for Fiscal Notes” in top Ribbon Bar to view the OFM Fiscal Notes site for Fiscal Notes associated with this Bill

The screenshot displays the 'BILL ANALYSIS & TRACKING SYSTEM' interface. The top ribbon bar contains several buttons: 'SAVE', 'SAVE & CLOSE', 'SEARCH FOR FISCAL NOTES', 'LSC WEBSITE', 'TRACK WITHOUT UPDATES', 'TRACK WITH HOURLY UP...', 'TRACK WITH DAILY UPDA...', and 'ADD'. The 'SEARCH FOR FISCAL NOTES' and 'LSC WEBSITE' buttons are highlighted with a red rectangular box. Below the ribbon bar, the main content area shows 'BILL : BILL INFORMATION' for '1000 - Law enforcement dea...'. The primary sponsor is listed as 'Beth Doglio'. A 'General' section is expanded, showing session information and titles.

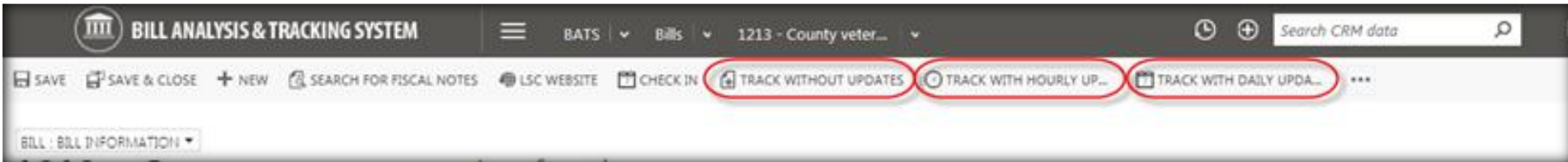
Bill #	1000	Date Introduced		Primary Sponsor	Beth Doglio
Bill ID	HB 1000	Original Chamber	House		

General

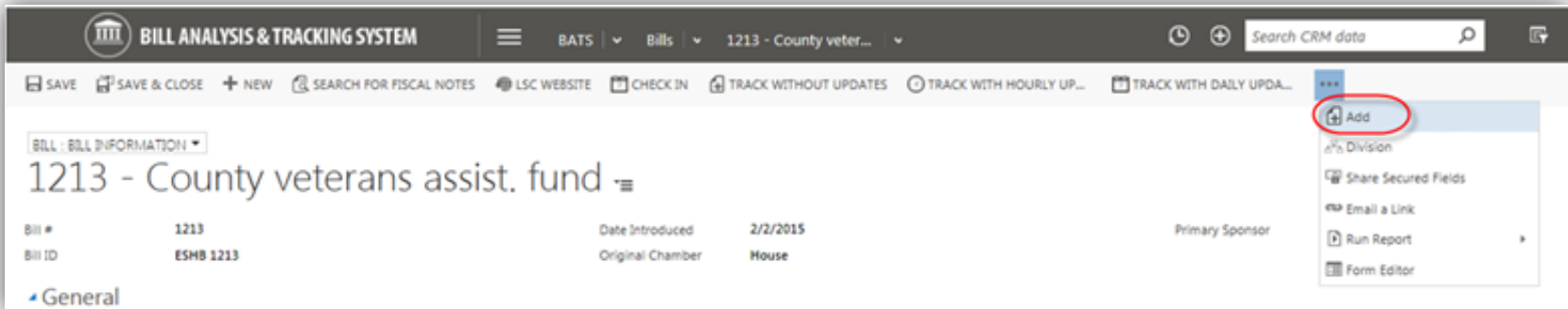
Session	--
Short Title *	1000 - Law enforcement deadly force
Official Title	AN ACT Relating to the use of deadly force by law enforcement and corrections officers;

# Bill Tracking - Individual

- Select the Update Options you would like to track with



- For an agency tracking:



# Bill History

- To view the Bill History via the Navigation Bar for details on changed versions of the Bill

The screenshot displays the 'BILL ANALYSIS & TRACKING SYSTEM' interface. The top navigation bar includes a hamburger menu, 'BATS', 'Bills', and '1000 - Law enforce...'. A red arrow points to a dropdown arrow in the top right corner. Below the navigation bar, there are two columns of menu items: 'Common' and 'Legislative Detail'. The 'Bill History' item in the 'Legislative Detail' column is highlighted with a red box. To the right, a preview of the bill information is shown for '1472 - Chemical action plans'. The preview includes fields for Bill #, Date Introduced, Primary Sponsor, Bill ID, Original Chamber, and a table of legislative activities.

**Common**

- Activities
- Closed Activities
- Audit History
- Stakeholders
- Classifications
- Related Bills

**Legislative Detail**

- Bill History**
- Hearings
- RCWs
- Tracking

**BILL : BILL INFORMATION**

## 1472 - Chemical action plans

Bill # 1472 Date Introduced 2/27/2015 Primary Sponsor [Joe Fitzgibbon](#)  
Bill ID E2SHB 1472 Original Chamber House

**Legislative Bill Activity Log Associ...**

+ ADD NEW BILL ACTIVITY L... + ADD EXISTING BILL ACTIVI... BULK DELETE CHART PANE RUN REPORT EXPORT BILL ACTIVITY LO...

Action Date	Bill Status	Action Description
4/29/2015 12:00...	H3rd Reading	Rules Committee relieved of further consideration. Pla...
4/24/2015 12:00...	HRules 3C	By resolution, returned to House Rules Committee for...
4/7/2015 12:00...	SRules 2	Minority; without recommendation.
4/7/2015 12:00...	SRules 2	Passed to Rules Committee for second reading.
4/7/2015 12:00...	SRules 2	WM - Majority; do pass with amendment(s) by Energy...
4/1/2015 12:00...	SWays & Means	And refer to Ways & Means.

Bill Status **H3rd Reading** Bill Status Date **4/29/2015**

# Hearings

- Click “Hearings” for information on Hearings related to the Bill
- Click the Hearing hyperlink to open the LSC Web Page

The screenshot displays the 'BILL ANALYSIS & TRACKING SYSTEM' interface. The top navigation bar includes 'BATS', 'Bills', and '1000 - Law enforce...'. A red arrow points to a dropdown menu in the top right corner. Below the navigation bar, there are two main sections: 'Common' and 'Legislative Detail'. The 'Common' section includes 'Activities', 'Closed Activities', and 'Audit History'. The 'Legislative Detail' section includes 'Bill History', 'Hearings' (highlighted with a red box), and 'RCWs'. Below these sections, the details for Bill 1004 are shown, including the date introduced (1/12/2015) and the primary sponsor (Larry Springer). A 'Hearing Associated View' section is visible, featuring a search bar and a table of hearings. A red arrow points to the 'Hearing Link' column in the table.

✓	Hearing Date/Time...	Committee Name ↑	Hearing Link	Hearing Location	H	▼
	3/20/2015 8:00 AM	CL	<a href="http://www.leg.wa.gov/Senate/committees/CL/Pages/...">http://www.leg.wa.gov/Senate/committees/CL/Pages/...</a>	Senate Hearing Rm 1 J.A. Cherberg Building	22138	
	3/25/2015 1:30 PM	CL	<a href="http://www.leg.wa.gov/Senate/committees/CL/Pages/...">http://www.leg.wa.gov/Senate/committees/CL/Pages/...</a>	Senate Hearing Rm 1 J.A. Cherberg Building	22166	

# Hearings

- The LSC Web Page opens in a new window and provides the hearing details



# Hearings

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- To add an Appointment to your calendar:
  - Click Back on the BATS Hearing Page
  - Select the hearing and Click “Copy A Link”



- Click on the Down Arrow & Select “Activities” from the Work Tile Ribbon
- Click the “New Activity”, Select Appointment
  - Fill in the details
    - Paste the previously copied link into the subject or description
- Click Save



# Hearing Report

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- The Hearing Report is available from either your Bills Page or Hearings Page.
- It can be exported.
- The report data relates to the selected view you are using.
- There is a default view system view available will show all the hearings in the next week that your Agency is tracking.



# Seeing RCW's

- To view RCW's, select in the top navigation bar
- Double click on an RCW

The screenshot shows the BILL ANALYSIS & TRACKING SYSTEM interface. The top navigation bar includes the system name, a menu icon, and the current bill information: BATS | Bills | 1004 - Alcohol tasti... A red arrow points to a dropdown arrow in the navigation bar.

The interface is divided into two main sections: Common and Legislative Detail.

**Common**

- Activities
- Closed Activities
- Audit History

**Legislative Detail**

- Bill History
- Hearings
- RCWs** (highlighted with a red box)

The RCW Associated View section shows the following table:

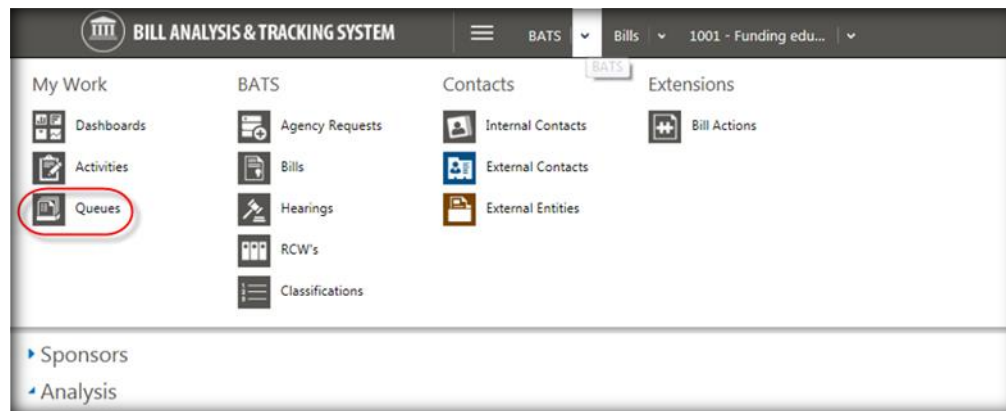
Bill #	1004	Date Introduced	1/12/2015	Primary Sponsor	Larry Springer
Bill ID	HB 1004	Original Chamber	House		
RCW Associated View					
CHART PANE   RUN REPORT   EXPORT RCW'S					
✓	Name ↑	Created On			
	66.20.010	12/9/2013 5:22 PM			
	66.44.270	12/9/2013 5:22 PM			

A red arrow points to the RCW ID 66.20.010 in the table.



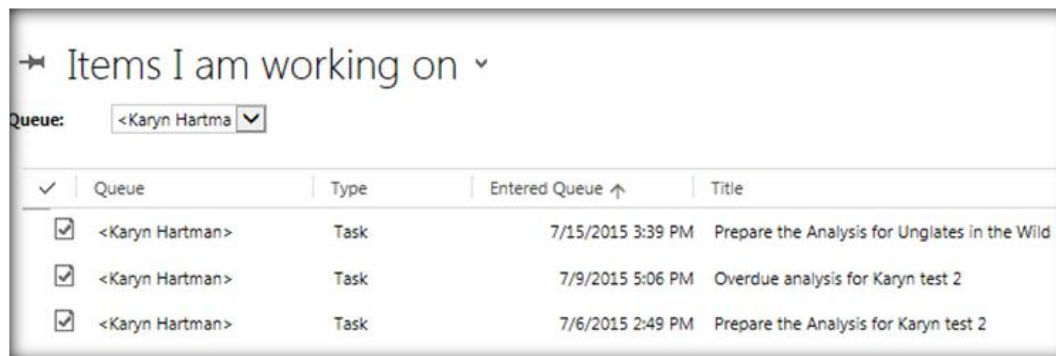
# Bill Analysis Preparation

- Navigate to the Queue.
- Click on the title of the queue item to open



The screenshot shows the BATS dashboard with the following sections:

- My Work:** Dashboards, Activities, **Queues** (circled in red), Sponsors, Analysis.
- BATS:** Agency Requests, Bills, Hearings, RCW's, Classifications.
- Contacts:** Internal Contacts, External Contacts, External Entities.
- Extensions:** Bill Actions.



Items I am working on

Queue: <Karyn Hartman>

✓	Queue	Type	Entered Queue ↑	Title
<input checked="" type="checkbox"/>	<Karyn Hartman>	Task	7/15/2015 3:39 PM	Prepare the Analysis for Ungulates in the Wild
<input checked="" type="checkbox"/>	<Karyn Hartman>	Task	7/9/2015 5:06 PM	Overdue analysis for Karyn test 2
<input checked="" type="checkbox"/>	<Karyn Hartman>	Task	7/6/2015 2:49 PM	Prepare the Analysis for Karyn test 2



# Bill Analysis Preparation

- Click on the hyperlink “Regarding” to complete the Analysis

The screenshot displays the 'BILL ANALYSIS & TRACKING SYSTEM' interface. At the top, there is a navigation bar with the system name and a menu icon. Below this is a toolbar with various action buttons: SAVE, MARK COMPLETE, SAVE & CLOSE, CLOSE TASK, CONVERT TO, DELETE, EMAIL A LINK, FORM, ASSIGN, and a more options menu. The main content area shows a task titled 'Reviews complete for HB 1026 WA Health Security Trust - Operations Analysis'. The task details include a subject line, a description, and a 'Regarding' field with a hyperlink to the task. A red arrow points to this hyperlink. The 'Owner' field is 'Deborah Ramos' and the 'Priority' is 'Normal'.

**BILL ANALYSIS & TRACKING SYSTEM**

SAVE ✓ MARK COMPLETE SAVE & CLOSE ✕ CLOSE TASK CONVERT TO ✕ DELETE EMAIL A LINK FORM ASSIGN ...

TASK : INFORMATION ▾

## Reviews complete for HB 10...

Task

Subject\*      Reviews complete for HB 1026 WA Health Security Trust - Operations Analysis

All reviews have been completed for HB 1026 WA Health Security Trust - Operations Analysis . Please do a final review and complete the analysis if appropriate.

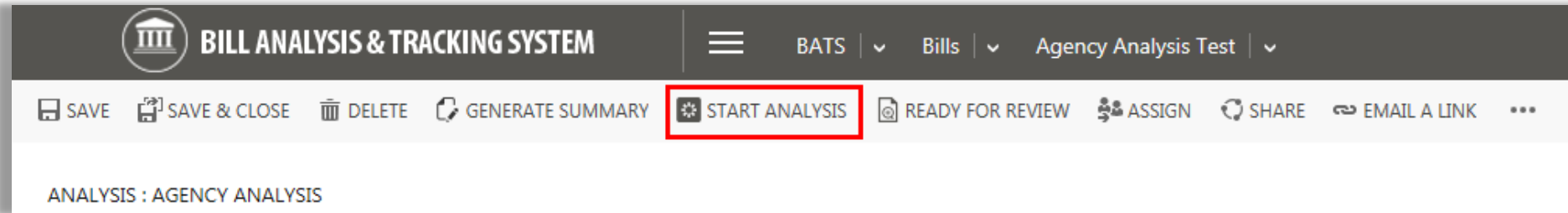
Regarding      [HB 1026 WA Health Security Trust - Operations Analysis](#) ←

Owner\*      Deborah Ramos

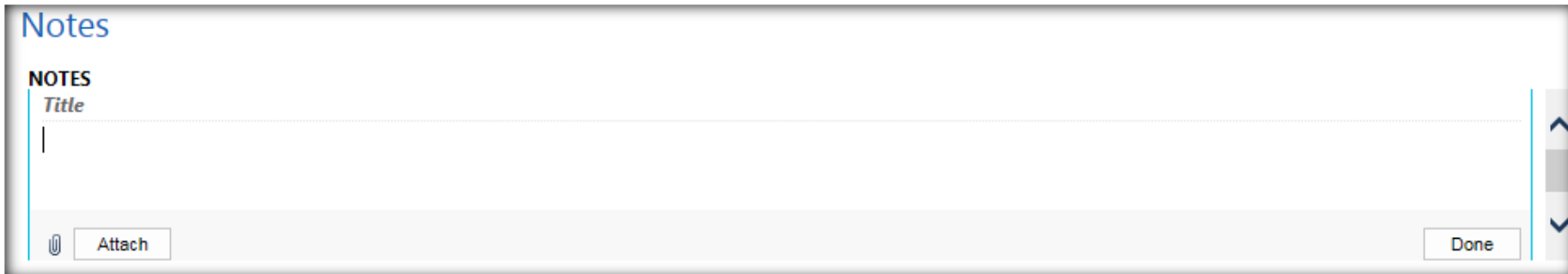
Duration      --      Priority      Normal

# Bill Analysis Preparation

- Click “Start Analysis” in the top Ribbon Bar

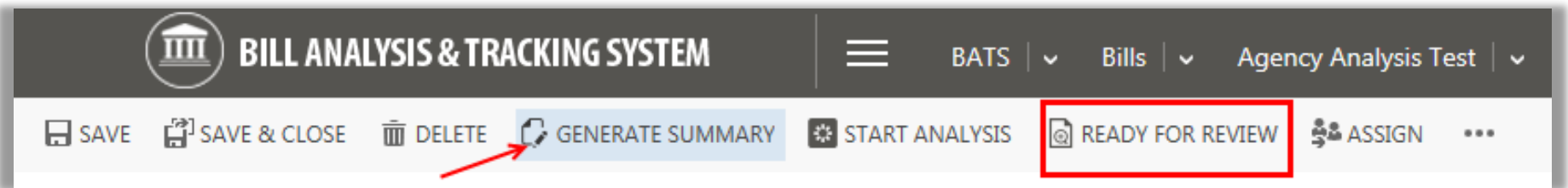


- Click “Notes” to add attachments or notes.

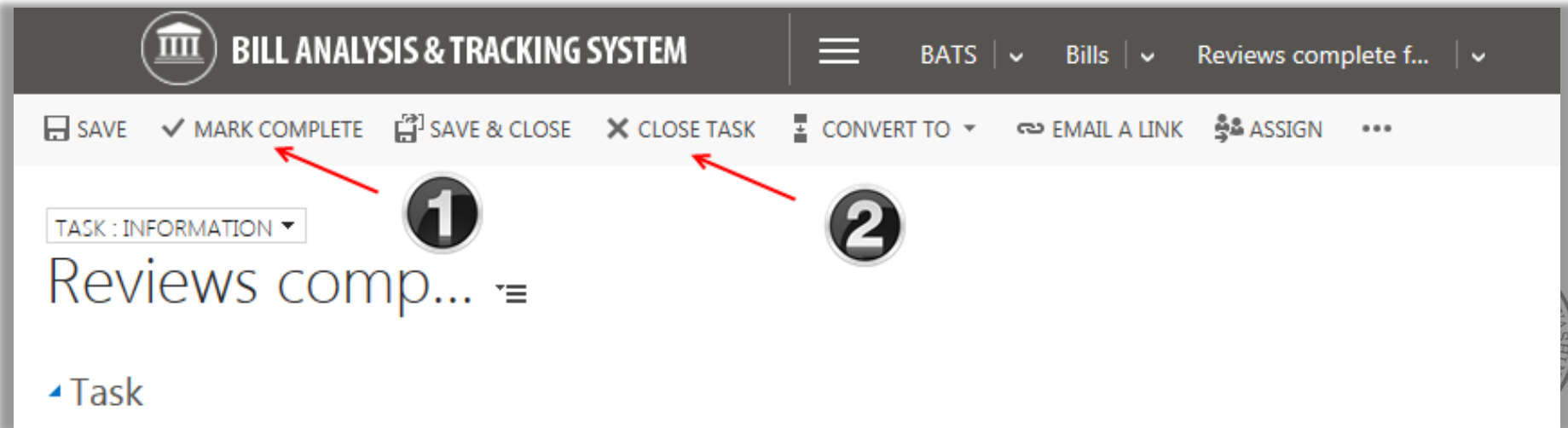


# Bill Analysis Preparation

- Click “Generate Summary” to verify Analysis
- Click “Ready for Review” to assign Analysis review to first reviewer

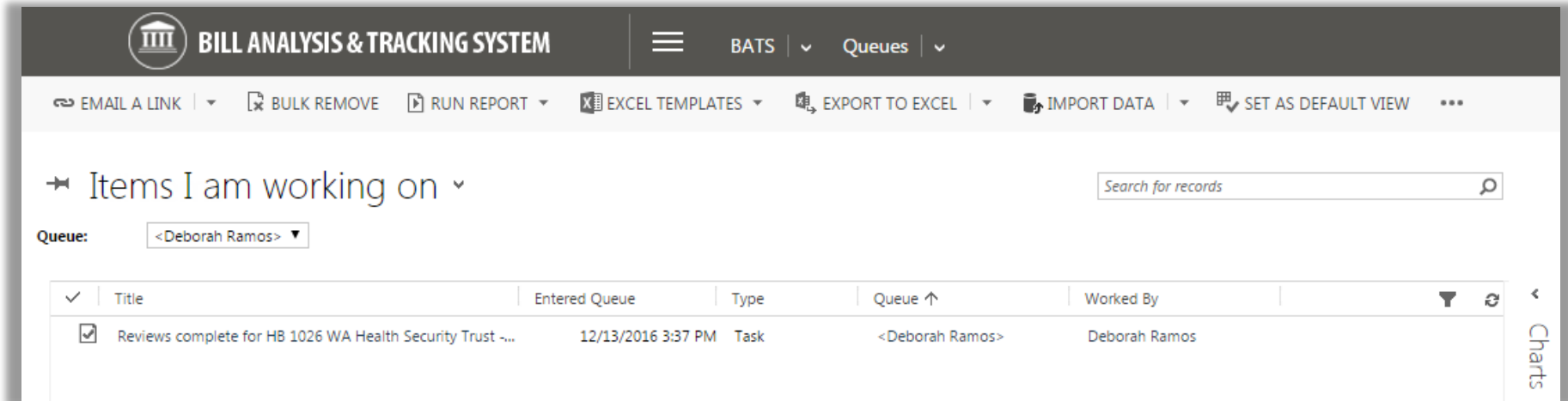


- Mark your task complete



# Bill Analysis Review

- From the Queue, click the queue item for “Review the Analysis”
- Click on the hyperlink (Analysis name) to review



The screenshot displays the 'BILL ANALYSIS & TRACKING SYSTEM' interface. At the top, there is a navigation bar with 'BATS' and 'Queues' menus. Below this is a toolbar with various actions: 'EMAIL A LINK', 'BULK REMOVE', 'RUN REPORT', 'EXCEL TEMPLATES', 'EXPORT TO EXCEL', 'IMPORT DATA', and 'SET AS DEFAULT VIEW'. The main content area shows 'Items I am working on' with a search bar. A dropdown menu for 'Queue' is set to '<Deborah Ramos>'. Below this is a table with the following data:

✓	Title	Entered Queue	Type	Queue ↑	Worked By
<input checked="" type="checkbox"/>	Reviews complete for HB 1026 WA Health Security Trust ...	12/13/2016 3:37 PM	Task	<Deborah Ramos>	Deborah Ramos

On the right side of the interface, there is a vertical menu with the word 'Charts'.



# Bill Analysis Review

- Review the Analysis and once reviewed, mark the task as “complete”

The screenshot shows the top ribbon bar of the BILL ANALYSIS & TRACKING SYSTEM. The ribbon bar contains several buttons: SAVE, MARK COMPLETE, SAVE & CLOSE, CLOSE TASK, CONVERT TO, EMAIL A LINK, and ASSIGN. A red arrow points to the MARK COMPLETE button, which is labeled with a circled '1'. Another red arrow points to the CLOSE TASK button, which is labeled with a circled '2'. Below the ribbon bar, the task name 'Reviews comp...' is visible, along with a 'Task' label and a dropdown menu.

- Or, click the “Complete” flag in top Ribbon Bar.

This close-up screenshot focuses on the top ribbon bar, specifically the 'COMPLETE' button, which is circled in red. Other buttons visible include SAVE, SAVE & CLOSE, DELETE, GENERATE SUMMARY, ASSIGN, SHARE, and SHARE SEC. Below the ribbon bar, the text 'ANALYSIS : AGENCY ANALYSIS' is visible.



# *Timeline*

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- From the time the Bill Analysis is assigned:
  - 3 days for lead program.
  - 2 days for support program.



# Resources

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- WaTech
  - Phone: (360) 407-9100
  - Email: [Servicecenter@watech.wa.gov](mailto:Servicecenter@watech.wa.gov)
  - Production Environment URL:  
<https://xcrm.wa.gov/crmbats>





# Questions?

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