BillTracker

User Guide

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Welcome to BillTracker

What is BillTracker?

BillTracker provides comprehensive web-based legislative tracking services for bills introduced in the Oregon Legislature as well as other state legislatures. BillTracker is available at any time from any device with an active connection to the Internet. The information in BillTracker is updated constantly throughout the day and night and updates are pushed to subscribers every 10 minutes. Additionally, BillTracker provides organizations and advocates with extensive work flow tools that ease the process of sending and receiving legislative reviews, generating informative reports, and keeping stakeholders informed.

How do I access BillTracker?

Users can log in to BillTracker at www.billtracker.com.

Logging in to BillTracker

Once you have been set up to use BillTracker, login to the system at:

www.billtracker.com

Log in using your assigned username and password. If you have forgotten your password, select "Forgot Your Password" and follow the prompts to receive a new password. If you have forgotten your username, please contact your BillTracker Agency Administrator.

Once you have logged in, you will be directed to the daily calendar.

Changing your password

To change your password, select "Update Password" under the "Your Account" tab on the main navigation. The prompts will walk you through updating your password.

Creating your user settings

BillTracker allows users to customize their interactions with the application. Key settings include Email notifications for third readings, a daily calendar, status of reviews, and bills of interest. Additionally, users can customize how meeting notices are received and which bills generate meeting notices.

BillTracker has four optional email notifications. These are accessed by selecting "User Settings" under the "Your Account" tab on the main navigation bar.

Each of these notifications defaults to "off."

Third Reading Email – Users may select the Third Reading Email report. If selected, BillTracker will send the user a daily Third Reading list of the bills tracked bills that meet the criteria.

Daily Calendar Email – Users may select the Daily Calendar Email to receive a daily calendar that includes the daily scheduled hearings, times, meeting locations and other important information for the affected tracked bills.

Completed Reviews Email – Users that assign reviews may select Completed Reviews Email to receive a daily update on the status of any recently completed reviews.

Keyword Email – BillTracker allows you to receive daily email notices about new bills that may be of interest to you. To receive this notice select the Keywords email and enter the terms of the search in the Keywords box. Individual terms should be separated with a space and search phrases should be enclosed in quotation marks. Users who have selected this option will receive a daily email with an alert to any new bills that meet the search criteria.

Users may opt to receive meeting invitations as plain text. Most meeting invitations arrive as Calendar (.ics) files, the industry standard calendar file. However, some smartphones are not compatible with .ics files. Users who elect to receive your BillTracker meeting announcements as plain text will not be able to synchronize with an .ics compatible calendar program.

Many users are interested in limiting the meeting announcements they receive when bills are scheduled for hearings. Users can deselect specific priority levels using the toggles under Priority Levels for Meeting Invitations section. Remember, if you deselect a priority, you will NOT receive a notification if the bill is schedule for a hearing or for a third reading. It will continue to appear on your BillTracker calendar.

To receive text message alerts, users must provide a valid mobile telephone number. To activate the service provide the 10-digit phone number and select from one of the supported carriers. BillTracker will send the user a validation text which must be retrieved and entered in User Settings.

Getting started with BillTracker and using the calendar

After logging in to BillTracker, users will be directed to the calendar. The calendar provides the complete hearing schedule for bills that are being tracked by the user or by the terms designated using the profile selector.

The calendar defaults to the current week. To see the daily schedule, select the day from the calendar. To select a week, select the arrow to the left of the week. To select a different month, use the arrows to the left or right of the month indicator.

The calendar is continuously updated throughout the day, generally within 10 minutes of the hearing being posted. *Every effort is made to post information as quickly as possible, however, during one-hour notice periods, users are cautioned that BillTracker notices may not post in advance of the hearing.*

To print the calendar, select the "Print Calendar" button on the left side of the screen. Users can export individual meetings to an Outlook or Google calendar by selecting the calendar icon next to

the hearing time on the main calendar.

Users can view the bill detail by clicking the bill number itself or the arrow to the right of the bill number. This will navigate the user to a new screen. At the bill detail page users can see additional information about the bill.

House and Senate third readings are listed daily for bills being tracked by the designated bill manager. The third readings are updated each morning.

Users may also set up different profiles for the calendar page. The profile function allows BillTracker data to be narrowly filtered by a wide range of parameters. To learn more about creating and using profiles please see the section titled Setting Up and Using Profiles.

Legislation is uploaded into BillTracker daily, and new bills are generally available on the morning they receive a first reading in the originating chamber of the legislature. Engrossed bills are also available upon first reading following the adoption of the amendments by the chamber of action.

Viewing legislation

To view introduced legislation, select "Bills" from the main navigation bar.

Users also can select from the following options:

Today – Select *Today* to display a list of the bills introduced over the previous 24-hour period. This list includes both tracked and untracked bills.

This week – Select *This Week* to display a list of the bills introduced over the current day and previous six days. This list includes both tracked and untracked bills.

Tracked – Select *Tracked* to see a list of bills being tracked by all Agency users.

Recent – Select *Recent* to see a list of bills introduced over the current day and previous three days. This selection also allows users to specify a date range. The range can be selected using the date selector above the list of bills.

Pre-session – Select *Pre-session* to see a list of concepts that have been entered by Agency users. Also select Pre-session to upload legislative concepts ("LC drafts") or add legislative concepts to the tracking queue.

Reviews – Select *Reviews* to see a list of all pending and outstanding review forms.

In each section, bills are listed using their Relating clause and brief summary or "catch phrase" for the bill. Bills can be sorted by bill number or by introduction date using the toggles at the top of the bill list. Users can display between 10 and 250 bills on the screen using the display drop down. Only the most recent version of the bill is displayed on the main Bills page.

Bills are color coded into three categories:

1. Bills highlighted in orange are untracked.
2. Bills highlighted in green are tracked by the agency.
3. Bills highlighted in blue have been added to the user's bill tracking queue.

Reading Legislation

Users can view a PDF version of the legislation by clicking on the PDF icon.

New bills are always marked as *unread* when they are added to BillTracker. As users review bills they can be marked as *read* by clicking on the Unread/Read indicator on the right side of the main bill title.

Users can filter bills by a wide range of parameters using the profile too. To learn more about creating and using profiles please see the section titled Setting Up and Using Profiles.

Selecting Bills for Tracking

Tracking legislation in BillTracker is a two-step process. First, bills must be added to the Tracking Wizard, and then the Tracking Wizard is used to define the parameters for tracking. There are two ways to add bills to the Tracking Wizard.

OPTION ONE – ADDING MULTIPLE BILLS TO THE TRACKING WIZARD

To add multiple bills to the tracking wizard, select the + icon on the main bill title.

Once the bill has been added to the Tracking Wizard queue, it will be highlighted blue. The Tracking Wizard is user specific. Any bills that are added to the Wizard are only added for the user that has logged in. Multiple users within an agency may add bills to their Tracking Wizard simultaneously.

Users can add unlimited bills to the Tracking Wizard. Once a bill is added to the Wizard, it can only be removed by going into the Tracking Wizard and using the bill removal tool.

OPTION TWO – QUICK ADD/EDIT

To quickly track a single bill, select the pencil icon on the main bill page.

HB 4004 INTRO
OR, 2016 Regular Session, Untracked

Selecting the Quick Add/Edit will by-pass all other bills that have been added to the Tracking Wizard and immediately allow users to enter their tracking information on the bill.

Setting Up and Using Profiles

BillTracker allows users to quickly filter the Bills view and the Calendar view by a wide range of pre-defined parameters. To select a profile, use the drop down menu to switch to a different profile.

To create a new profile, select *Create New Profile*. A menu will open allowing users to name the profile and select priorities, select divisions/departments and select Bill Managers. Users can select any combination of priorities, divisions/departments, and Bill Managers and create a profile. To save a profile, give the profile a name, then select the parameters, then select the *Save* button. To set the profile as the default, select "Set As Default."

Profiles are specific to individual users, they are not shared across Agencies.   Users can create unique profiles for the Bills view and the Calendar view.

Using the Bill Tracking Wizard

The Bill Tracking Wizard allows users to select which division is tracking a bill, which bill managers are tracking a bill, and the position, priority and program area for the bill. Additionally, the Bill

Tracking Wizard allows users to route bills out for review, add meeting notice recipients and identify a lead bill manager.

Users that have selected the Quick Add/Edit option will immediately be directed to the Bill Tracking Wizard for the identified bill. Users that are not using the Quick Add/Edit option can navigate to the Bill Tracking Wizard by selecting Tracking Wizard from the main navigation.


The Tracking Wizard requires users to identify at least one bill manager and at least one division.

Users must select at least one bill manager and may select an unlimited number of bill managers. To learn more about bill managers, please see the section on Permissions. To select a bill manager check the box next to the manager's name.
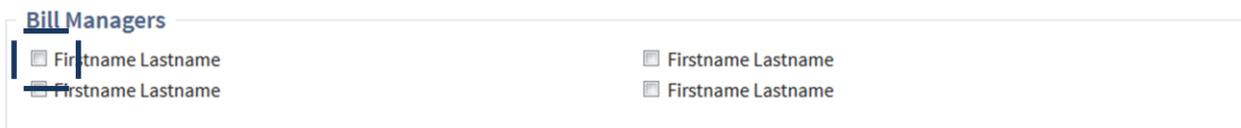
The selected bill manager will be associated with the bill and will receive calendar notifications and/or text messages when the bill is scheduled for a hearing or scheduled for a third reading. Additionally, the bill manager will be associated with the bill on all reports.

After selecting a Bill Manager, users must also select at least one division/department. To select a division/department check the box next to the division/department name. The division/department is independent of the Bill Manager.
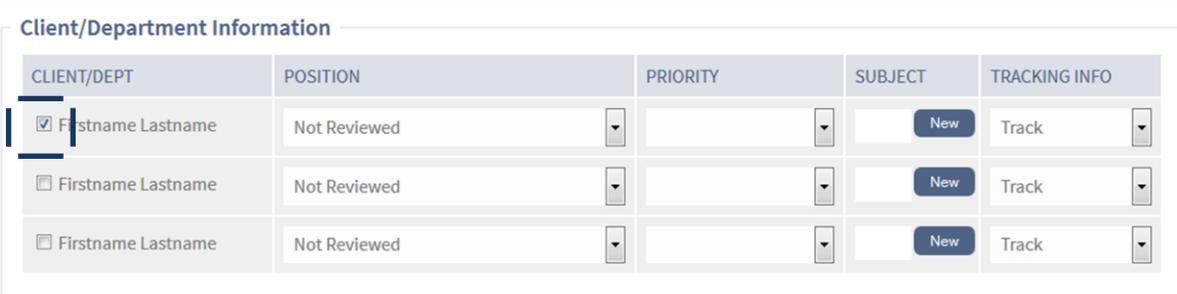
For each division/department, users have the option of selecting a position, a priority and a program area or subject. Position, priority and program area/subject are all specific to the division/department.

Users also have the option of altering the tracking information. All bills default to being tracked. Users may elect to monitor a bill instead of tracking it. Bills that are monitored still generate meeting announcements and third reading announcements; however, they do not show up on most

reports.

Once the bill manager(s) and division/department(s) have been selected, users MUST select the *Save and Continue* button to track the bill and/or save any changes to the tracking status.

NOTE: Users MUST select [Save and Continue] **to track legislation.**

After saving the bill, the Tracking Wizard will advance to the next bill in the queue or, if the bill was a Quick Add/Edit bill or the last bill in the queue, the user will be returned to the main bills page.

Users can also select the *Show Options* button to display three additional options: Set Lead Manager, Request Reviews, and Request Meeting Notifications.

Set Lead Manager – this option allows users to identify a lead Bill Manager if multiple managers have been selected for the bill. The lead manager is highlighted in bold on all reports, noted on the Bill Detail Page and bills can be filtered by lead manager on the Search page. To select a lead manager, use the main drop down and highlight the manager name.

Request Reviews – BillTracker offers users a comprehensive work flow tool for the distribution and collection of bill reviews. The process is initiated with the Bill Tracking Wizard. To send a bill review request select the heading for the division/department. This will open a list of all available reviewers. To send a review request, users must check the box next to the reviewer's name. Users can also elect to add a note to the review request. Notes should be added in the box marked *Message*. Users can select an unlimited number of reviewers.

Review requests will be sent when the user select the *Save and Continue* button. The review requests are generated by BillTracker and include the name of the requester, the bill number, the relating clause and a link to a PDF version of the bill. Reviewers are prompted to provide a recommended position, recommended priority and are offered an opportunity to provide comments on the bill.

Review requests are specific to the version of the bill. The review request form defaults to the most current version of the bill. However, users can use the *Select bill version* toggle to view review request recipients on prior versions of the bill.

The list of reviewers is pre-populated and can only be altered by the agency BillTracker administrator(s). To add a reviewer to the list, users must contact an administrator.

Meeting Notifications – users can designate individuals or user groups to receive meeting

notifications when hearings are scheduled for the bill or the bill is on the third reading list. To add meeting notification recipients first select the division/department and then check the box next to the recipient's name or the name of the user group.

Meeting notification recipients are pre-populated and can only be altered by the agency BillTracker administrator(s). To add a meeting notification recipient to the list, users must contact an administrator.

Users may select a lead manager, may select reviewers and may select meeting notification recipients. Each is optional.

Once the optional parameters are selected, users MUST select the *Save and Continue* button to track the bill and/or save any changes to the tracking status.

After saving the bill, the Tracking Wizard will advance to the next bill in the queue or, if the bill was a Quick Add/Edit bill or the last bill in the queue, the user will be returned to the main bills page.

In the Tracking Wizard, users can remove a single bill by selecting "Remove this bill this bill from Wizard" in the top right corner of the Wizard. Users can also remove all bills and skip a bill (it will be placed at the end of the queue).

Search

BillTracker offers users two main ways to search for bills. QUICK SEARCH

To perform a quick search, users can enter a bill number or keyword in the Quick Search boxes at the top of every page. The Quick Search returns results only for the current legislative session. Please note that the Keyword Quick Search only searches the relating cause and the summary/catch line for the bill. To search the full text of the bills, or to search bills from previous sessions, users must use the Search view.

ADVANCED SEARCH

To perform an advanced search, select *Search* from the main navigation.

| Bills | Calendar | Search | Reports | Tracking Wizard | Administration | Tools | Your Account | Help |

The advanced search option allows users to filter the bills by any of the following parameters: Bill

number: Users can enter any combination of the bill number.

Priority: Users can select a single priority or multiple priorities. Subject: Users can select a single subject or multiple subjects. Position: Users can select a single position or multiple positions.

Sponsor: BillTracker searches for both main sponsors and other sponsors. Users can type in any portion of the sponsor's name. Multiple sponsors should be separated by a comma.

Keyword: On the advanced search screen the keyword search offers a full text review. Multiple subject searches should be separated with a comma. To search for specific phrases, enclose the phrase in quotation marks. In addition, keyword searches can be constructed using other Boolean phrases such as NOT and OR and AND. For example, the search "'Health Care' NOT insurance" would generate a list of all bills with the phrase "health care" contained in the text and omit any bills from that list that also included the word "insurance."

Legislative sessions: For most states, BillTracker includes data going back to the 2007 legislative session. To include past sessions in the search results users must select the sessions desired. The search defaults to the current session if no other sessions are selected.

Division/department: Users can select a single division or multiple divisions. Bill Manager: Users can select a single bill manager or multiple bill managers.

Reviewer: Users can select specific reviewers from the drop down list. The search will return all bills for which the reviewer has received a review request.

Pending reviews: Selecting the Pending Reviews box will return all bills that have incomplete reviews pending.

No Reviewers Assigned: Selecting the No Reviewers Assigned box will return all bills that have not been assigned for review. The No Reviewers Assigned selection can be combined with the division/department selection.

Reviewed From: Users can filter by dates of the most recent reviews.

Introduced From: Users can filter by the date of bill introduction. The Introduced From tool uses the latest version of the bill. Engrossed bills will be returned on the day the bill is engrossed, not the day of original introduction.

Last Action From: Users can filter by the date of last action. The Last Action From filter includes any action that is posted to the bill.

Hearing Scheduled: Selecting the Hearing Scheduled box returns all bills that have a hearing scheduled in the future. It does not return bills that have previously had hearings but are not

currently scheduled for hearings.

Latest Committee: Users can filter bills by the current committee or committees in which they are residing.

Active Bills: Selecting this box includes only bills that have had a work session or are in House or Senate Rules, House or Senate Revenue or Ways and Means. This option is only useful after the hearing deadlines in the House and Senate.

The advanced search tool returns results in order of bill number, not based on the frequency of the searched term.

Users can add bills to the Tracking Wizard from the search results. Search results cannot be saved or exported. To save or export search results users must use the Reports tools.

Bill Detail

BillTracker provides extensive information about both tracked and untracked legislation. The page is also where users can edit tracking, untrack bills, and alter e-mail and text notifications for individual tracked bills. **This is the only place that users can completely untrack a bill.**

The Bill Detail page can be accessed either through the Main Bill view or through the Search. To access the Bill Detail, users click on the bill number in either the Bill view or the Search results.

On the Bill Detail page users can access the following information:

Tracking Information: The tracking information includes a list of the bill managers and the status of the tracked bill. Users can update the tracking status of the bill using the *Edit Tracking* button. This will take users to the Bill Tracking Wizard. Users can untrack the bill by selecting the *Untrack* button. Selecting the *Update Notifications* button will open a page that permits users to opt in or opt out of e-mail notification for the bill and opt in or opt out of receiving text notifications on the bill.

Interested Parties: The Bill Detail displays a table of all divisions/departments that are tracking the bill, including the position, priority, and subject/program area.

Most Bill Detail information is found in the tabs in the middle of the page.

Bill Documents: The bill documents tab displays bill versions, bill amendments, and additional documents. The bill versions are updated upon introduction and engrossing and are stored chronologically. The bill amendments section displays only adopted amendments. "Additional Documents" includes a wide range of items including Fiscal Impact Statements, Revenue Impact Statements, Staff Measure Summaries, and any testimony submitted to the committee or provided by committee staff. The bill documents tab is updated three times per day.

Documents	History	Meetings	Notes	Bill Reviews	Materials	Votes	Tracked Votes	Session End Notes	Linked Bills

Bill History: The bill history tab displays the House and Senate measure histories for each bill.

Documents	History	Meetings	Notes	Bill Reviews	Materials	Votes	Tracked Votes	Session End Notes	Linked Bills

Hearings: The hearings tab provides a list of all scheduled committee meetings for the legislation; both future and past hearings are listed. Users can add hearings to their calendar by selecting the calendar icon under the *Calendar* heading. To e-mail a meeting announcement to a colleague or interested party, users can select the *Email This Meeting* tool under *Contact*.
This will generate a form allowing users to hand enter e-mail addresses.

Documents	History	Meetings	Notes	Bill Reviews	Materials	Votes	Tracked Votes	Session End Notes	Linked Bills

Notes: Users can add unlimited notes to each bill. Notes can be specific to a single division/department or can be applied across all divisions/departments. To add a note users, type the note into the main data entry box. There is no limit on the length of notes.

BillTracker default so not "sharing" user notes. Unshared notes can only be viewed by Bill Managers, administrators, and users that have been expressly granted that permission. To share notes more widely, users must check the *Shared* box on the Notes pane. Shared notes can be viewed by all users.

It is recommended that users make notes division/department specific. To do this, select the division/department from the drop down window. Notes specific to a division/department will only appear on the identified division's reports. Unspecified notes will appear on all reports for all divisions. To save the note, select the *Add Note* button. Notes are listed chronologically.

To edit a note, select the edit icon in the *Actions* column of the notes table. This will transfer the note back into the editing window where it can be updated. Users must select *Add Note* to save any updates. To delete the note, select the delete icon from the *Actions* column of the table.

Reviews: BillTracker provides users with comprehensive tools for sending and receiving reviews. To learn more about sending reviews please see the section on using the Bill Tracking Wizard. Once bills have been routed for review, users can track the status of the review requests using the Reviews tab.

Pending reviews – users have two options for reviews that have not yet been completed. The reminder icon will re-send the review form to the original recipient. The delete icon will notify the reviewer that the review is no longer needed and will eliminate the request from the reviews table.

Completed reviews – Users can take two different actions on submitted bill reviews. Selecting the accept review will update the priority and position for the division/department of the reviewer and will copy the reviewer comments over to the Notes section of the bill. Reviews can be accepted on multiple reviews. If the accepted reviews are in different divisions/departments the priority and position for each of the distinct divisions will be recorded. If two or more reviews are accepted for the same division the position and priority of the last accepted review will be retained for the bill. The comments from all accepted bills will be posted to the notes field. Completed reviews can also be archived. In that instance they will disappear from the table. To view archived reviews users can use the Active Reviews/Archived Reviews toggle at the top of the Reviews table. Users can also elect to take no action on reviews.

Materials: The Materials tab serves as a virtual file cabinet for the bill. Users can update documents, read documents, edit documents and send documents from the Materials tab.

To upload documents, users select the *Add Materials* button. Adding a material is similar to attaching a document to an email. In the Add Materials window users select *Choose File* and it will open the file manager. Once a file is selected users can give the file a name and type in a description. Users can also save an internet link in the *Link to a File* section. Users can upload any type of file and virtually any size file.

To view a file, users select the view file icon. This will open the file on the user's computer. In order to view a file the user must have the application supporting the file extension.

To modify the name or description of the file or update a URL users select the edit icon. The *Add Materials* window will reopen and users will be permitted to update the fields. To delete a file, users select the delete icon.

Sending materials – BillTracker permits users to send materials including testimony, fiscal impact statements, blue sheets and any other document or file the user is interested in sharing. Materials can be sent to legislators, committee staff, colleagues and other bill managers.

To send materials users select the *Send Material* button. The Send Materials window walks users through sending the documents. Documents are sent using the users email address, not a BillTracker address. Selected recipients each receive a discrete email; however, the emails are not personalized to the recipient. Responses to that email are sent directly to the user/sender. To send a document requires the following steps:

1. Add a subject to the email. The subject will be the same for all recipients.
2. Check the box to send a copy to the yourself (the sender) if desired.
3. Identify which attachment(s) should be included with the email.
4. Select individual or groups of recipients using the recipient selector. To change the group options, use the drop down bar.
5. To send the email(s) use the *Send Now* button. The emails are sent immediately.

Sent documents are tracked on the Materials tab. To view the document history, select the history icon.

Documents	History	Meetings	Notes	Bill Reviews	Materials	Votes	Tracked Votes	Session End Notes	Linked Bills

Vote Tracking: BillTracker allows users to view votes on legislation and provides a tool to allow users to project vote counts.

To view votes select the chamber from the toggle. The vote will be displayed in the *Actual Vote* column. Votes are updated nightly and only the most recent vote in the chamber is displayed on the vote viewer.

To track projected votes, users can select Yes, No or Undecided on a legislator by legislator basis. Users can also include notes related to the projected votes section. The Vote Tracking section can be viewed by all Bill Managers and administrators, as well as any users that have been specifically granted that permission.

Documents	History	Meetings	Notes	Bill Reviews	Materials	Votes	Tracked Votes	Session End Notes	Linked Bills

Session End Notes: BillTracker allows users to quickly produce end of session reports. Users can elect to add specific notes to any bills using the Session End Notes tab.

Documents	History	Meetings	Notes	Bill Reviews	Materials	Votes	Tracked Votes	Session End Notes	Linked Bills

Linked Bills: BillTracker allows users to link bills both between sessions and within a session. To link bills users first select the session for the bill, then select the bill number using the corresponding data entry fields. Users can link an unlimited number of bills. To unlink bills, users select the delete icon.

Reports

Reporting is a fundamental function of BillTracker. The system allows users to create a wide range of reports including pre-designed standard reports, Excel exports, scorecard reports, and custom reports. Reports can be saved and/or scheduled for automatic deliver.

Standard reports

BillTracker offers 14 basic reports in four categories:

- *Bill Reports* are not limited to just tracked bills. Bill Reports include state, session, bill, version, date, relating clause and summary. They do not delineate between tracked and untracked bills.
- *End of Session Reports* are used to summarize all activity at the end of a legislative session. They include the disposition of legislation.
- *Review Reports* provide information about the status of reviews.
- *Tracking Reports* are the most commonly used reports and allow user select from a wide range of formats and included information. Tracking reports only include bills that are being tracked by the firm.

To create basic pre-designed reports, select *Reports* on the main navigation.

| Bills | Calendar | Search | Reports | Tracking Wizard | Legislators | Your Account | Your Firm | Administration | Help |

To run a pre-defined report, users take the following steps:

1. Select a report from the Select Report drop down.

Reports

Select Report

Name

2. Select the parameters for the report. The report parameters are very similar to search options.

Users can filter reports by both internal options, such as division and bill manager, and external options, such as hearing date and sponsor.

3. One the parameters have been established select the Run Report button to produce the report. Most reports are PDF reports and will be generated in a report viewing window within the application. To save the PDF document, users need to use the save option in their PDF viewing software.

4. To save the report and its parameters select the *Run Later* button. A window will open prompting the user to provide a name for the report. Users can also schedule the report to run automatically and be emailed to specified recipients. Most saved reports are dynamic reports. For example, if a user saves a report that includes the bill number, the last three actions, and bill notes then each of those fields will be update when the report runs. If the report runs weekly, any new actions or notes added to the bill during the week would be updated on the next report.

5. To access saved reports select "Saved Reports" from the Reports menu item.

Excel reports

To run an Excel report, users take the following steps:

1. Select Exports - Excel from the Reports menu item.
2. Users can select Data Export Fields from the list of available fields. To select a field, either drag and drop the field from the Available box to the Selected box or double click the field and it will move between boxes. AT LEAST ONE FIELD MUST BE SELECTED.
3. The export order is based on the order in which fields are selected. Fields can be moved using the drop and drag feature in the selected box.
4. From the Options section, users can opt into notes and presession bills.
5. Select the parameters for the report, as described for the pre-defined reports.
6. Select either Run Now or Run Later.
7. If Run Later is selected, users must give the report a name and select the Save button. Users can also use the optional Schedule Report tool to automatically mail reports to users. Instructions for setting frequency and adding e-mail recipients are included in the general reports section.
8. To access saved Excel exports, select "Saved Exports" from the Reports drop down menu.

Custom export reports

To run a custom report, select "Export - Custom Report" from the Reports drop down. Take the following steps to run the report:

1. Select up to ten (10) fields for inclusion in the report from the "Available Report Fields" section. Fields can be moved using drag and drop or by double clicking the field. There are three types of report fields. Standard fields are listed in gray and can be added to Standard Fields section. Standard fields are rendered on the same line in the report. Non-repeating full width fields are listed in orange and can only be added to the appropriate section. Non-repeating full width fields are rendered on their own separate line in the report. Repeating full width fields are in blue and can only be added to the corresponding section. Repeating full width fields generally contain more data and can also include multiple entries.
2. Fields will be displayed in the order in which they are listed in the Selected Report Fields section. They can be adjusted using drag and drop.
3. Select options for the report.
4. Select the parameters for the report, as described for the pre-defined reports.
5. Select either Run Now or Run Later.

<u>Scorecard reports</u>
1. Select Scorecard Reports from the Report drop down.
2. Select the type of Scorecard Report to run.
    a. By Bill – produces a PDF document that lists all scorecard bills on individual pages and includes a list of all legislators and their votes.
    b. By Legislator – produces an Excel file that includes all legislators and all bills.
3. Select the Scorecard Report parameters. Scorecard reports can be run by client and/or by session. Reports can be given custom titles.

<u>End of Session reports</u> – End of session reports review users tracked legislation and include information as to the final disposition of a bill. Please remember, upon sine die most states allow a significant amount of time for a bill to be signed or vetoed by the governor. The status of a bill can change overnight, despite adjournment. To determine the status of a bill, BillTracker uses the History tab.

1. Select Reports
2. Select End of Session reports from the Select Report drop down
    a. End of Session – A PDF report that lists bills by department/division/client and includes bill number, status, position, priority, effective date, last three actions and summary.
    b. End of Session (Style 2) – A PDF report that lists bill number, status, effective date, last

three actions and summary.

c. End of Session Report by Priority – the same as Report A, but organized by priority.

Fiscal Impact Statements

The Fiscal Impact Statement tool permits users with appropriate permissions to (1) request fiscal impact statements for specific bills or amendments to specific bills; (2) complete fiscal impact statements and attach them to the bill detail pages; (3) review and accept final fiscal impact statements; (4) route fiscal impact statements for internal review; and (5) send completed fiscal impact statements to the Department of Administrative Services and/or Legislative Fiscal Office.

To request a fiscal impact statement, users take the following steps:

1. Identify the bill for which the fiscal impact statement is to be submitted. To do this, users either type the bill number into the general search at the top of the screen or use the BillTracker search function.
2. Go to the Bill Detail page by selecting the bill number.
3. Select Fiscal Impact on the Bill Detail tabs.

| Documents | History | Meetings | Notes | Bill Reviews | Fiscal Impact | Governor Reviews | Materials | Votes | Session End Notes | Linked Bills |

4. Authorized users select the Request Review button to open a data entry form for routing fiscal impact statement requests.

Show: Active Reviews | Archived Reviews

DEPARTMENT	REVIEWER	REQUESTED	REVIEWED	BILL VERSION

No Fiscal Impact Reviews Available

Request Review

4. To send a fiscal impact statement review request, users must take the following steps:
   a. Confirm the version of the bill – BillTracker defaults to the current version of the bill.
   b. Select a reviewer from the drop down. Reviewers are segmented by division. This step is required.
   c. Optionally, users may elect to include a message with the e-mail requesting the completion of a Fiscal Impact Statement.
   d. Attachments to the review request can be preloaded by an administrator. Please see the Administrator Manual for instructions.

    e. Once all the required options are selected, users click the Save button to save and send the review request. The request, along with a fiscal impact statement review form, a fiscal impact statement Excel spreadsheet, instructions for completing the fiscal impact statement, and any new attachments will be e- mailed to the identified reviewer.

    f. If the required reviewer is not listed under the division heading, then users will need to contact their agency administrator to add them to the list of authorized reviewers.

    g. Any documents attached to the fiscal impact statement will be stored with the review and, if accepted, posted to the Materials tab.

To complete a fiscal impact statement review there are two options. Option one.

Reviewers will receive an e-mail that includes a link to the appropriate version of the bill, links to the attached documents, and a link to an online review form. Users can open the review form(s) and complete them. They then select the online review link and complete the online review form and upload the attachments for the bill.

Option two.

Users with permission to access BillTracker can complete the fiscal impact review form within the application. To do so, users take the following steps:

1. Log into the application;
2. Search for the bill;
3. Select the bill;
4. Go to the Bill Detail page;
5. Select the Fiscal Impact tab; and,

6. Select the Complete Review button. This will open up the form for completion.
7. Users then take the same steps outlined in option one.

BillTracker allows administrators and Fiscal Impact Statement coordinators to accept completed fiscal impact statements as the final version. That version can be forwarded internally or externally.

To accept a fiscal impact statement review as the final version users may select the checkbox next to the review.   Reviews that are accepted will be highlighted in green.
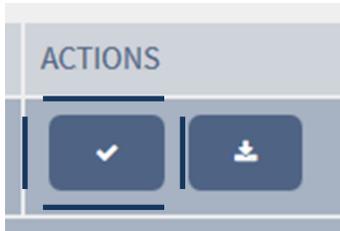
Reviews can be routed internally for additional administrative approval or, once completed, they can be routed to Legislative Fiscal Office and or Department of Administrative Services.

Governor Reviews

The Governor Reviews tool permits users with appropriate permissions to (1) request governor reviews for specific bills or amendments to specific bills; (2) complete governor reviews and attach them to the bill detail pages; (3) review and accept final governor reviews; (4) route governor for internal review; and (5) send completed governor reviews to the Department of Administrative Services and/or the Governor's Office.

To request a governor review, users take the following steps:

1. Identify the bill for which the review is to be submitted. To do this, users either type the bill number into the general search at the top of the screen or use the BillTracker search function.
2. Go to the Bill Detail page by selecting the bill number.
3. Select Fiscal Impact on the Bill Detail tabs.

3. Authorized users select the Request Review button to open a data entry form for routing fiscal impact statement requests.

4. Users send a governor review request by taking the following steps:
   a. Confirm the version of the bill – BillTracker defaults to the enrolled of the bill.
   b. Select a reviewer from the drop down. Reviewers are segmented by division. This

step is required.
c. Optionally, users may elect to include a message with the e-mail requesting the completion of a governor review.

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Reviewer

Message

Save   Cancel

d. Once all the required options are selected, users click the Save button to save and send the review request. The request, along with a governor review form will be e-mailed to the identified reviewer.
e. If the required reviewer is not listed under the division heading, then users will need to contact their agency administrator to add them to the list of authorized reviewers.

To complete a governor review there are two options.

Option one.

Reviewers will receive an e-mail that includes a link to the enrolled version of the bill and a link to an online review form. Users can open the review form and complete the review.

Option two.

Users with permission to access BillTracker can complete the governor review form within the application. To do so, users take the following steps:

1. Log into the application;
2. Search for the bill;
3. Select the bill;
4. Go to the Bill Detail page;
5. Select the Governor Review tab; and,
6. Select the Complete Review button. This will open up the form for completion.
7. Users then take the same steps outlined in option one.

BillTracker allows administrators and Governor Review coordinators to accept completed fiscal impact statements as the final version. That version can be forwarded internally or externally.

To accept a governor review as the final version users may select the checkbox next to the review. Reviews that are accepted will be highlighted in green.

ACTIONS
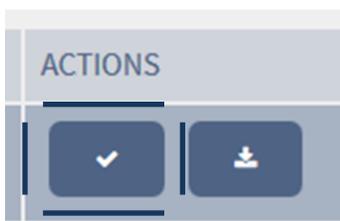
Reviews can be routed internally for additional administrative approval or, once completed, they can be routed to the Governor's Office and/or Department of Administrative Services.

Legislators and Help

Legislators: BillTracker allows users to view legislators and their contact information. To view legislators select *Legislators* from the Legislators menu item. Legislators are listed in alphabetical order by chamber.

Notes can be added for individual legislators. To add notes select the pencil icon and update the note. Notes are firm specific and cannot be viewed by other firms. Legislator Notes can be viewed by all firm Bill Managers and Administrators.

Help: Each page in BillTracker offers users basic help for that page. The users' manual is available in its entirety at www.billtracker.com.

BillTracker is a product of Election Solutions, Inc.   Election Solutions can be reached at info@billtracker.com or at 503-320-9487.