

Revising a Departmental Manual (DM) Chapter

1. Lead Action Office (LAO) role and actions.
 - a. Download the current chapter from [ELIPS](#).
 - b. Use track changes and make the necessary revisions to the chapter.
 - i. Make the policy broad and use other forms of policy documents (guidance or policy memoranda) to fill in the gaps when necessary.
 - ii. Coordinate with a [Section 508](#) expert either within the LAO or the Office of the Chief Information Officer (OCIO) to ensure the revised chapter complies with Section 508.
 - iii. It is recommended the LAO informally discuss the draft with affected Bureaus or Offices and the Office of the Solicitor to address any concerns early in the drafting process.
 - c. The LAO will upload the revised (redline and clean version) chapter into [DTS](#) and route through the LAO's leadership and obtain their surnames. This is typically to an Assistant Secretary and through Deputy Assistant Secretary/Secretaries.
 - d. The LAO should route the redline and clean final draft of the chapter, a [Note to Reviewers](#) (include a contact person and their contact information), and any supporting documents to the Office of the Solicitor – Division of General Law (in DTS route to SOL-DAD) to determine whether there are any legal issues with the revised chapter. The LAO will need to determine whether to accept SOL-DGL comments and incorporate the edits or discuss with SOL-DGL to work out compromise language.
 - i. If the changes are minimal, the revised chapter should clear SOL-DGL and be ready for the next steps in the approval process.
 - ii. If the SOL has concerns, a second round of discussions and surnaming may be required.
 - e. If the revised chapter affects other Bureaus or Offices, the LAO should route the redline and clean final draft, a Note to the Reviewers, and any supporting documents to the AS of the affected Bureaus or Offices.

Note: if the LAO is unsure where to route the revised chapter, it is appropriate for the LAO to contact the Policy Management Unit (PMU) in the Office of the Executive Secretariat (OES) to confirm.

 - i. This portion of the review process may be done simultaneously if the surnames fall under different AS.
 1. If you are using a simultaneous surname process, keep the review at comparable levels. For example, if the document is being reviewed by Bureau of Land Management Law Enforcement it should not simultaneously be under review by the Assistant Secretary for Fish, Wildlife and Parks (AS-FWP).

2. Make sure all reviewers are using track changes. Depending on how many people will be reviewing, this may necessitate the creation of a “master” document to better track and document changes and comments and maintain version control.
 - f. Draft a [transmittal memo](#) to explain what changes are being made, why the changes are necessary, and if there is a deadline or a need to coordinate the publication of the chapter.
 - i. The transmittal memo should come “From” the LAO director, “Through” the Deputy Assistant Secretary (DAS) and Assistant Secretary (AS), and “To: Director, Office of the Executive Secretariat and Regulatory Affairs”.
 - ii. Once the chapter is in final “draft” status, route the redline and clean version to the AS for review and approval. A completed example of the [transmittal memo](#) is available for reference.
 - g. Transmit the final draft of the revised chapter to the PMU in DTS (OES-DIRECTIVES).
 - i. The DTS record must contain:
 1. A clean “draft” of the chapter(s)
 2. A redline copy indicating all changes from the existing chapter(s)
 3. A signed Transmittal Memo
 4. A surname report of all the required surnames
 5. A Note to Reviewers; include a contact person and their information
 6. The [DM Transmittal Sheet](#) to accompany the revised chapter.
 - a. The DM Transmittal sheet offers a brief summary of the changes being made and is the “signature document” that indicates final approval of the revised chapter. It will be posted in ELIPS with the revised chapter.
 - b. The Date, Release Number, and the Issuing Authority’s Signature boxes should remain blank.
 - ii. The PMU will not accept revisions to a DM chapter without a signed transmittal memo that has all the required signatures.
2. PMU role and actions
 - a. The PMU will check [formatting](#), Section 508 compliance, and provide edits to keep the language clear and concise. The PMU may identify conflicts between the revised chapter and other directives or Secretary’s Orders and notify the LAO.
 - i. The PMU will provide the LAO with a list of required surnames if any were missed in step 1.e. The surnames will need to be obtained prior to PMU Review.
 - ii. The PMU will review the DM Transmittal Sheet for completeness and Section 508 compliance.
 - b. The PMU will return the revised draft chapter to the LAO to adjudicate comments, if any. The LAO will return the revised draft chapter to the PMU.

- c. The PMU will review any incorporated edits for formatting, clarity, and typos.
- d. The PMU will provide the necessary documents to the Secretary's Office for final review.
- e. Upon Approval by the Secretary's Office, the PMU will acquire the AS-PMB signature on the DM Transmittal Sheet.
- f. The PMU will confirm the approved chapter and DM Transmittal Sheet to be Section 508 compliant and upload to ELIPS.
- g. The PMU will notify the LAO that the revised chapter has been approved and is now part of the DM.