In Reply Refer to:
1221 (OR-958.2) P

September 24, 2003

EMS TRANSMISSION 09/25/2003
Instruction Memorandum No. OR-2003-117
Expires: 9/30/2004

To: All Oregon State Office Employees
From: State Director

Subject: FY04 Instruction Memorandum and Information Bulletin
Templates for Microsoft Word 2002

Program Area: Directives Management.

Purpose: To issue Fiscal Year (FY) 2004 Instruction Memorandum (IM) and Information Bulletin (IB) templates.

Policy/Action: The FY2004 templates are located in the S:\900\Directiv directory. To start a template, always use File/New. In the New Document task bar on the right, always select General Templates. This will ensure you are using the most current templates. Thus, do not save any templates off to your own directory. For help in setting up Word to access the templates if you don't see them, use this link http://web.or.blm.gov/records/Word2002DirTempInst.htm. As in past years, if the templates are not used, documents will be returned unprocessed to the staff assistant. If the program lead has not prepared the document using the template, it is up to the staff assistant to put it into the template format.

Bureau Form 1220-1, Clearance Sheet, is still required as the routing sheet. This form is available on the Information Mall at http://web.or.blm.gov/records/forms/f-index.htm. You will then need to scroll down to the Bureau forms category. Keep in mind that we are never to modify a Bureau form, so use it as it is published on the web.

Please keep in mind that the Records Administration Team is not responsible for proofreading; however, if an egregious error is noticed, the document will be returned.

Timeframe: Effective upon receipt.

Budget Impact: None.

Background: Each fiscal year the directives numbers change so new templates need to be issued. In accordance with the Bureau word processing standard, these templates have been created in Microsoft Word. For an explanation of what information goes under each heading in an IM, see Attachment 4.

Coordination: Lisa Blackburn, Oregon State Office Freedom of Information Officer; Cindy Fredrickson, State Office Records Manager; Heather Gisch, Computer Specialist.

Contact: If you have any questions regarding the use of these templates, please contact Mary O'Leary at 503-808-6159; Cindy Fredrickson at 503-808-6450; Heather Gisch at 503-808-6214; or Lisa Blackburn at 503-808-6276. If you have any questions regarding the implementation of this IM, or any questions regarding the Records program, please contact Sherrie Reid, Chief, Realty Records Section at 503-808-6655.

Districts with Unions are reminded to notify their unions of this IM and satisfy any bargaining obligations before implementation. Your Servicing Personnel Office or Labor Relations Specialist can provide you assistance in this matter.

Signed by
Charles E. Wassinger
Associate State Director

Authenticated by
Mary O'Leary
Management Assistant

6 Attachments
1 - General Processing Steps and Requirements for Processing Oregon State Office Directives (2 pp)
2 - Form 1220-1, Clearance Sheet (1 p)
3 - Addressing the To: Line of a Directive (1 p)
4 - Explanation of Instruction Memorandum Headings (1 p)
5 - Helpful Hints (3 pp)
6 - Directives Checklist for Staff Assistants (1 p)

Distribution
WO-560 (Room 750, LS) - 1
Helpful Hints:

1. **FOIA codes**
   - **P = Public** Use on directives with full public access.
     
     A “P” is used when the content of the directive is a policy or practice that directly affects a member of the public and when no information contained in the directive is prohibited from release under the FOIA. Example of use: Directive on the BLM’s cost recovery policy.

     Directives with a “P” access code must be posted on both the Intranet and Internet.

   - **I = Internal** Use on directives that can only be accessed by the BLM staff and that may require a FOIA request for public access.
     
     An “I” is used when (1) the content of the directive contains any information that is prohibited from release without review under the FOIA, and/or (2) when the content is strictly internal BLM policy or practices that do not affect the public. Examples of use: A temporary directive seeking leave donations for a co-worker; a temporary directive distributing a draft policy to other BLM staff for their review and comment.

     Directives with an “I” access code must be posted only on the Intranet (internal website).

   - **R = Restricted** Use on directives with access restricted to specific BLM staff.
     
     An “R” is used when the content of the directive is administratively sensitive and viewing is restricted to limited BLM personnel who have “a need to know” (i.e., only the person(s) the directive is addressed to, not all BLM employees, and not for public release). Example of use: Directive explaining sensitive security or Law Enforcement procedures.

     Directives with an “R” access code must not be posted (linked) on either the Internet or the Intranet website.

   It is the responsibility of the author of the directive to assign the correct access code. If in doubt, contact Lisa Blackburn, FOIA/Privacy Act Officer, at 503-808-6276.

2. **To: lines.** Most common ones are:
   - a. All Oregon State Office Employees;
   - b. All Oregon/Washington Employees;
   - c. All District Managers;
   - d. DMs, DSDs, Staff and Branch Chiefs.

3. **Use the correct format for the Distribution line as shown in the example below.** Please note the spacing where the parentheses are and that the number of copies has been omitted.

   **Distribution**
   
   WO-620 (1000, LS)

4. On the To: and From: lines, be sure to use titles (not individual names). If you want to send to a specific group, here are a couple of examples:
To: All District Managers
   Attn: Fire Officials

To: All District Managers
   Attn: Recreation Planners

5. If an IM has expired and you are issuing a new directive to keep the same policy in place, you could add under the heading of **Purpose:** something like this:

   IM-OR-2002-001 has expired effective 09/30/03. This is a re-issuance of current policy which was established in that directive. There are no changes to this policy.

6. What does "surnaming a document" mean? When surnaming a document, the individual is acknowledging that he/she agrees with the content of the document and places in the upper right corner, his/her initials and last name plus organization code and date surnamed. It is not necessary for the signing official to surname the yellow copy because the signature is sufficient.

7. Leave only one line between the bottom of the last paragraph and the "Signed by" signature block so the signing official will sign **below** the words. Also, do not fill in the Authenticated signature block. The Records staff will do that when they process the directive.

8. The signature block cannot be on a page by itself. Always include a minimum of two lines of text. You can use the feature Keep Lines Together (under Format, Paragraph then Line & Page Breaks and check Widow/Orphan) to prevent single lines at the bottom or top of pages. You may have to highlight your entire document to make this affect all pages. As a general rule, names and dates should never be split at the end of a line. To keep text together, delete the existing space and replace it with Ctrl/Shift/space (this is referred to as a hard or required space). For dates, use Ctrl/Shift/hyphen. To assist in seeing the space and code, you may want to click on the Show/Hide Paragraph symbol in your tool bar.

   Attachment 5-2

9. If you want to add the file name and path to the bottom of your documents for the author lines, save your document first, then from the Menu bar, click Insert, AutoText, Header/Footer and File & Path Name. Remember to remove this line from the original before forwarding for signature.

10. Use of automatic page numbering is preferred rather than manually placing the page numbers. This prevents the page number from wrapping to the top of the next page if text is added. However, do not number page one of the directive.

11. In numbering attachments, keep in mind that the first number is the number of the attachment and the second number is the page number. If the attachment is a **memo with attachments, the entire thing is all one document** and the page count includes all of the related attachments. If the attachment is already available on the web, you can simply reference the document within the directive and make it a link rather than attaching it to the directive. Doing so, you won't have to list it under Attachments. If referencing a website, please include a printout of the referenced page to be included as part of the official record. Following are examples of correct formatting for multiple page attachments:

   Attachment 1-1
   Attachment 1-2
   Attachment 1-3
   Attachment 2-1
   Attachment 2-2