The Long-Term Care Policy Manual: Roles and Responsibilities

This chapter defines the roles and responsibilities of the Long-Term Care (LTC) manual coordinator, management bulletin (MB) coordinator, and LTC chapter owners. This chapter provides policy guidance on writing and formatting chapters, submitting requests for policy clarification and drafting and coordinating management bulletins.

Ask the Expert

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TABLE OF CONTENTS

The Long-Term Care Policy Manual: Roles and Responsibilities 1
Table of Contents 1
Background 4
Long-Term Care Manual—Roles and Responsibilities 4
Coordinating Updates to the Long-Term Care Manual 4
What Is the Role of the LTC Manual Policy Owners for Maintaining Chapters and Chapter Updates? 4
What is the Role of the LTC Manual Coordinator? 5
What is the Process for Coordinators and Policy Owners When Completing Chapter Updates During the Triannual Update Cycle? 5
How Often Must the Policy Owner Review Their Chapter(s) and Management Bulletin(s)? 7
What Ongoing Work is Required for Policy Owners? 8
What Must be Included in Chapter 8
When a Chapter Identifies a Service 9
When a Chapter Covers a Program 9
Tips for Writing Chapters 9
How do Policy Owners Successfully Upload Documents & Attachments to the Designated LTC Manual Folder to Create Accessible Hyperlinks for Documents? 10
How to Create a New Chapter 12

When and How Should a Chapter be Dissolved? 12
How to Make Chapters Accessible 13
Roles and Responsibilities for the Creation and Maintenance of Management Bulletins 14
What is the Role of the Management Bulletin Coordinator? 14
How and When Does a Policy Owner Write a Management Bulletin (MB)? 14
What are the Three Types of Management Bulletins? 15
What Review Process is Needed for Management Bulletins? 15
How Do Policy Owners Engage in the Management Bulletin Process and Collaborate with the Management Bulletin Coordinator? 16
What is the Role of the Policy Owner in Transitioning Management Bulletins to Chapter? 17
How do Policy Owners Collaborate with the LTC Manual Coordinator on Chapter Update Management Bulletins (MBs)? 18
How to Rescind a Management Bulletin 18
Tips for Successfully Drafting Management Bulletins 18
Roles and Responsibilities for Regional and AAA Teams in Collaborating on Policy 19
Responsibility of Regional/AAA Staff in Training Material Development 19
How Regions Can Request a Policy Update or Clarification 20
AAA Collaboration and Review Processes 21
How Should Policy Owners Collaborate with AAA Partners on the Formulation of Policy? 21
How are Policy Updates Communicated to the AAA? 21
How is Risk Assessed by the AAA? 22
How Does the AAA Provide Feedback on Requests? 22
SharePoint Coordination Processes 22
Who Can Access the Various Tools on the LTC Manual SharePoint Site? 24
What Process Can Policy Owners Follow to Access the LTC Manual SharePoint Site? 24
How do Policy Owners Access Chapter Drafts on the LTC Manual SharePoint Site in Preparation for the Next Revision Cycle? 25
How do Policy Owners Work on Chapter Drafts in the LTC Manual Chapter Draft Folder on the LTC Manual SharePoint Site? 26
How do Program Managers (or Their Designees) Upload Finalized Chapter Drafts into the Finalized LTC Manual Chapter Draft Folder on the LTC Manual SharePoint Site? 27
How Can JRPs/SHPCs and Program Managers Submit a Request for Policy Update or Clarification and How do Policy Owners Respond to Said Request? 27
How Can JRPs/SHPCs and Program Managers Access and Search the Log of Resolved Requests for Policy Update or Clarification? 29
Resources 29
Accessibility Resources 29

Chapter and MB Resources....29
Acronyms....29
Revision History....30
Appendix....30

BACKGROUND

The Long-Term Care (LTC) Manual is a set of standard operating procedures that guides line staff in partnering with clients and offering choice in accessing support, care, and resources. It provides up-to-date, clear, and concise policy language, which is critical for carrying out the duties of the department. Headquarters staff are responsible for coordinating and performing regular timely updates to this Long-Term Care Manual.

LONG-TERM CARE MANUAL—ROLES AND RESPONSIBILITIES

Policy owners, LTC Manual coordinators, chapter owners, regional and Area Agencies on Aging (AAA) partners, and the Home and Community Living Administration (HCLA) subject matter experts collaborate though a regular, standard process to update and maintain accurate and up-to-date policy in the LTC Manual chapters. This coordination also ensures a shared understanding and consistency in messaging to the regions. Throughout this chapter, the roles and responsibilities for those involved in the various LTC Manual processes will be defined and clarified.

What is the difference between policy owners and chapter owners?
Chapter owners are the person(s) responsible for the maintenance of a specific chapter of the LTC Manual. There may be multiple policy owners within a given chapter. It is the responsibility of the chapter owner to include all policy owners for their chapter in the revision/update process. An example of this is that Chapter 9 has chapter owners, but within that chapter, guardianship policy is referenced. Chapter 9 owner would need to include the guardianship policy owner at each revision/update cycle.

COORDINATING UPDATES TO THE LONG-TERM CARE MANUAL

What Is the Role of the LTC Manual Policy Owners for Maintaining Chapters and Chapter Updates?

Long-Term Care Manual policy owners are responsible for making timely updates to the chapter and act as subject-matter experts on the content of the chapters they are responsible for. Policy owners must collaborate regularly and frequently with regional, AAA, headquarters staff, Developmental Disabilities Administration (DDA), and community partners to ensure timely and accurate updates.

Special Note for Change of Chapter Ownership:
It is the responsibility of the out-going chapter owner or their supervisor to notify the LTC Manual Coordinator whenever there is a change in chapter ownership. The LTC Manual Coordinator needs to know the incoming or interim chapter owner's name and contact information prior to the transition taking place because access needs to be granted through a Service Now request.

Policy owners are to collaborate with regional/AAA partners by responding to any requests made for policy update or clarification within **seven business days** and resolving the matter within **ten business days** of receiving the request. If a response requires multiple policy or program managers input and exceeds ten business days, policy owners need to communicate this delay and expected date of resolution to the requesting party. Policy owners also are required to collaborate on the development of or update to policy. This involves having discussions and providing adequate time to receive responses from regional/AAA teams and other policy owners at Home and Community Services (HCS) and AAA. HCS partners, including the AAA/Washington Association of Area Agencies on Aging (W4A) group, should be involved early in discussions on matters that may impact their work.

What is the Role of the LTC Manual Coordinator?

The LTC manual coordinator manages the updates and posting of the LTC Manual. In this role the LTC manual coordinator will create and set the triannual dates for updating chapters or establishing management bulletins to update chapters. This schedule will be sent to the chapter owners on an annual basis.

Schedule A draft of this schedule is as follows (please note the image below is an example of the schedule. Chapter and policy owners can refer to the Long-Term Care Manual SharePoint site for a current schedule:

LTC Manual Coordinator e-mails chapter owners to begin draft updates	Chapter draft due dates -- back to LTC Manual Coordinator	MB created by LTC Manual Coordinator and sent to the MB Coordinator	MB Coordinator routes MB to Office Chiefs	MB Coordinator routes MB to staff and stakeholders for review	Final steps to post updated chapters and release MB's
First week of March	**First week of April**	15-Apr	Third week of April	Last week of April	First week of May
First week of June	**First week of July**	15-Jul	Third week of July	Last week of July	First week of August
First week of September	**Last week of September**	28-Oct	First week of November	Mid-November	Third week of November
December to March are dedicated to the Legislative Session					

EXAMPLE ONLY

What is the Process for Coordinators and Policy Owners When Completing Chapter Updates During the Triannual Update Cycle?

1. LTC manual coordinator will notify chapter owners of each triannual chapter review and update period.

2. Policy/chapter owners will collaborate with subject matter experts (SMEs), joint policy owners, regional & AAA partners, and DDA staff on draft.

3. Obtain the owning office chief or unit manager's approval on the draft changes.

4. Policy/chapter owners will make edits to their chapter, ensuring all necessary edits are made prior to the scheduled due date. Leave track changes on this draft.

5. LTC Manual policy/chapter owners will notify the LTC manual coordinator that the draft version of chapter in track changes is available and ready for review in the LTC Manual Drafts folder on SharePoint and provide them with 3-5 bullets summarizing the key changes or updates made to the chapter by sending an email to the LTC manual coordinator of the bullet points. This is the information that the LTC manual coordinator will use in the management bulletin.
    - It is crucial that policy owners adhere strictly to the schedule/timelines provided for submissions of drafts to be published.
    - Policy owners will no longer need to email the LTC manual coordinator with the attached draft of their chapter, as all drafts will be maintained in the *LTC Manual Chapter Drafts* folder.
    - These revised chapters should have advanced approval from the author's office chief or unit manager. LTC chapter owners should discuss the process for their specific team with their immediate supervisor.
    - When saving these drafts, policy owners should utilize the naming convention of "**Chapter #_short title_date_draft**" (e.g. **Chapter1_LTCPolicyManual_May2025_draft**) to streamline the collaborative policy implementation process.
    - If you are late with your chapter, please let the LTC Manual Coordinator know prior to the due date of the draft submissions.

The timely submission of chapter drafts is critical to the LTC Manual update process.

6. LTC Manual Coordinator drafts LTC Manual Update Draft MB and sends it to the MB coordinator.

7. MB coordinator sends LTC Manual Update Draft MB out to Staff, AAA, and Community Partners to Review and Comment on Draft MB. (Note: On the draft submittal date to MB coordinator, revised chapters and bulleted information are sent by the LTC manual coordinator to the Management bulletin coordinator who notifies the appropriate regional/AAA and headquarters staff that the draft is open for their review and comments.)
    - The timeframe allotted for comments is approximately one week.

8. MB Coordinator collects comments from Staff, AAA, Community Partners and sends them to the LTC Manual Coordinator to distribute comments and feedback to LTC Chapter Owners.

9. The LTC manual coordinator forwards the submitted comments to the policy/ chapter owners, to which the policy owners can either agree or disagree, integrating the information or edits that the policy owner agrees with.
    - The chapter owner must respond to the LTC Manual Coordinator within **seven business days**.
        - **If edits are needed**: The policy owner will make the necessary adjustments and obtain the office chief or unit manager's approval before the finished document is placed in the *Finalized LTC Manual Chapters* folder on SharePoint.
        - **If no edits are needed**: The policy owner will finalize the draft and place the file into the *Finalized LTC Manual Chapters* folder on the LTC Manual SharePoint.

- When saving these final drafts to the *Finalized LTC Manual Chapters* folder on the LTC Manual SharePoint site, program managers should utilize the naming convention of "**Chapter #_short title_date_final**" (e.g. **Chapter1_LTCPolicyManual_June2025_final**) to streamline the collaborative policy implementation process.

9. Once final, the LTC manual coordinator verifies that the chapter is complete with track changes removed and is ready to be put in the final MB.

10. The final MB and finalized chapters are sent back to the MB Coordinator for the MB coordinator to send to HCS Director and DDA Director for review and approval.

11. The HCS Director and DDA Director review final MB. If there are any changes, the MB coordinator will communicate this back to the LTC manual coordinator. The HCS Director and DDA Director have a week for their review.

12. The MB coordinator publishes the finalized MB and the LTC manual coordinator creates the single PDF of the compiled LTC Manual. The LTC manual coordinator ensures the final chapters are ready to be published and requests the webmaster team post the finalized files on the *LTC Manual website*.

When FINAL chapters are placed into the *Finalized LTC Manual Chapters* folder, they should be complete and ready for posting. This means all comments are removed and all track changes accepted or declined.

Prior to acceptance, the LTC manual coordinator will conduct a quality review to ensure the document meets all formatting standards and is complete, requiring no additional revisions.

How Often Must the Policy Owner Review Their Chapter(s) and Management Bulletin(s)?

Each chapter owner is responsible for updating their assigned chapter(s) upon entering their position and no less than tri-annually after that--meaning it must be reviewed for any necessary edits/corrections, and the last review or revision date should be updated to reflect this action on the chapter document itself. Chapters must be updated timely based on clarification requested from regional/AAA and headquarters staff or when new guidance is received. It is the expectation that chapter owners will respond to any requests for LTC updates or clarification received from regional/AAA or headquarters staff in a timely fashion, confirming receipt of the request within **seven business days** and offering a resolution within **ten business days**, as noted in the *"How Regions Can Request A Policy Update or Clarification" section.*

During reviews, it is the responsibility of the chapter owner to adhere to the formatting outlined in the *Chapter Template and Style Guide 2025*. This template and style guide is also available in the *Appendix* of this chapter.

Chapter owners are responsible for reviewing and making edits to draft chapter or management bulletins (MBs) after open comments are returned within **seven business days**. These are returned to the LTC manual coordinator via the LTC Manual SharePoint site so that they can continue the revision process without delay.

On a triannual basis, chapter owners will determine if management bulletins (MBs) that have been released for quick policy/procedure updates need to be added to the chapter and rescinded. *See MB process for more information.*

It is the responsibility of the chapter owner to learn and understand any programs or policies impacted by their chapter/policy. When policy changes affect other chapters, contact the other policy owner(s) to update their chapters accordingly. This ensures that consistent information will be provided across all chapters of the LTC Manual.

What Ongoing Work is Required for Policy Owners?

During off-cycle times, chapter owners should work with regions, other offices, AAA staff and subject matter experts (SMEs) to determine what changes, if any, need to be made to their chapters. If updates are needed, take the time to determine the potential impacts of these changes and vet your chapter updates before finalizing them. The best practice for doing this is by including others who may be impacted by the change (i.e. regional units, other Headquarters teams, AAA, and/or by presenting the change at the state-wide joint relations procurement (JRP)/social and health program consultant (SHPC) meeting). Lastly, coordinate any changes with the budget team, the Provider One team, and any other programs or entities that may be impacted, allowing enough time for their review and input.

It is the responsibility of the chapter owner listed within the chapter to properly maintain the chapter.

Chapter owners are responsible for responding to SharePoint requests about policy within **ten business days**, acknowledging receipt of the request within **seven business days.** If the policy is not clear, it should be updated to clarify appropriately. Delayed responses to these requests result in service delivery delays for our clients and increases the workload for our case management teams. These changes and/or clarifications, if adopted, can be communicated in a Management Bulletin or a formal update to the appropriate chapter. *See How Regions Can Request a Policy Update or Clarification section.*

WHAT MUST BE INCLUDED IN CHAPTER

The following are rules for what must be included in chapters, including the style guide that must be used for each chapter, which can be found here: *Chapter Template and Style Guide 2025*. This document is also available in the *Appendix* section.

Please also follow the following guidelines to ensure policy can be operationalized at the regional/AAA level.

When a Chapter Identifies a Service

When a chapter identifies a service, include the following to assist case managers in navigating:

a) List items to include when making a referral, how to refer, and the timeline for responses.
b) Is there a requirement to try other services first?
c) Are there other programs/services/options to consider? If so, when there are multiple choices that have differing eligibility criteria, spell out the differences between the choices. When able, provide a chart (flow chart, table, giving a visual diagram of the differences).
d) What needs to be documented by a case manager and where (service episode record (SER) notes, treatment screen, forms, etc.)?
e) What documentation, if any, must be submitted to Document Management Services (DMS)?
f) What is the approval process and timeline?
g) List what recipient aid categories (RACs) are eligible for this service?
h) Provide authorization details—service code(s) and modifier(s), units allowed (link to *service code data sheet).*
i) What client notices must be issued (i.e. Planned Action Notice (PAN)).

When a Chapter Covers a Program

When a chapter covers a program, include the following to assist case managers in navigating:

a) Identify what makes a client eligible for the program including if other resources should be considered prior to accessing.
b) What needs to be documented by a case manager and where (service episode record (SER) notes, treatment screen, forms, etc.)?

Many Chapters may include both programmatic and service eligibility information. For these LTC Manual chapters, ensure that service details and eligibility details follow the guidelines listed above.

TIPS FOR WRITING CHAPTERS

Think about the way the regions do their work. Your policy will be used to implement programs and services to the clients we serve. Using the following tips will help the case managers gain access to necessary information in an expedited fashion.

- Keep like topics grouped together. This allows the case manager to be able to find all the information pertaining to that topic in one place (e.g. put all bed hold information together in one section).
- Add links to other chapters if you are referencing that chapter. Try to link rather than replicate information in multiple chapters.
- Involve parties in discussions early when they will be impacted by the chapter creation or update. Seek feedback and allow adequate time for thoughtful responses.

- Use the *Chapter Template and Style Guide 2025*. Having familiar and consistent formatting across the LTC Manual makes individual chapters easier for our case management team to navigate.
- Prior to submitting final drafts of chapter, double check to ensure that all links work and that visual aids are correct.

How do Policy Owners Successfully Upload Documents & Attachments to the Designated LTC Manual Folder to Create Accessible Hyperlinks for Documents?

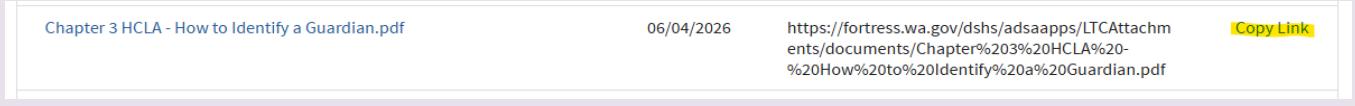
The Process

- **Step1:** Copy attachments to the designated folder: \\dshswboly2411c\LTCAttachments. Please know that access to this folder is limited to policy and chapter owners.
- **Step 2:** Go to the website that allows you to view and search for the attachments and retrieve the public facing link to each attachment:
- **Step 3:** Use links in the LTC manual chapters. The link to an attachment can then be added to LTC chapter. Clicking on that link in the chapter will open the attachment for all public facing users to view

Naming Conventions for Attachments

Use a standardized naming convention for attachment of **Chapter # – Attachment Name.docx.** This will make it easier to identify and search for manual attachments for colleagues outside of the DSHS firewall or the public on the attachment web site.

For **documents referenced in multiple chapters**, please use the link that references the chapter that the attachment originates from. For example, to use an attachment from Chapter 3 on How to Identify a Guardian in Chapter 9 for inpatient assessing, you would find the attachment on the web site (https://fortress.wa.gov/dshs/adsaapps/LTCAttachments/Default.aspx) and utilizing the available link to the document by clicking the Copy Link option. There is no need to add the document again and re-name the documents to align with your chapter.

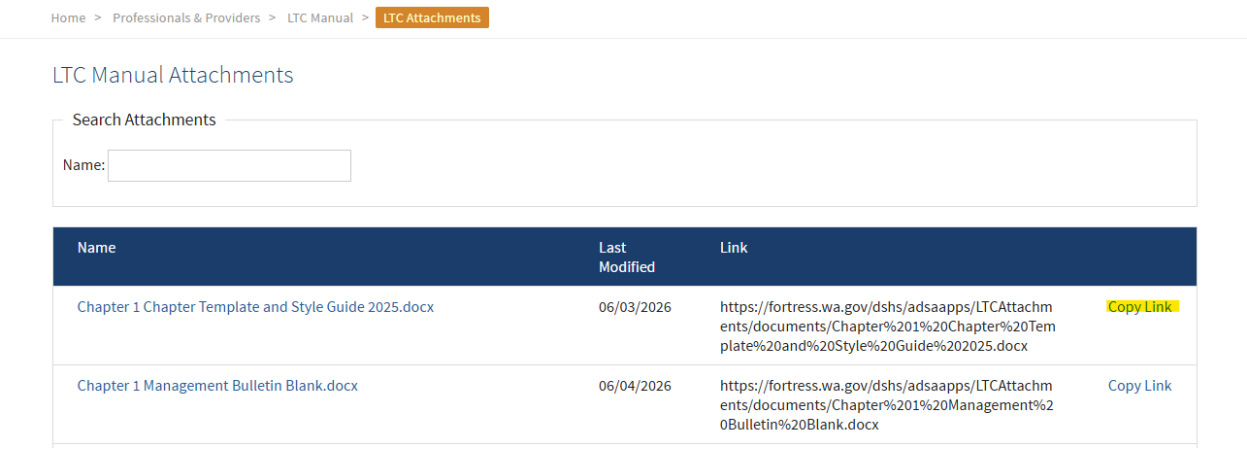


Expanded Steps for this Process

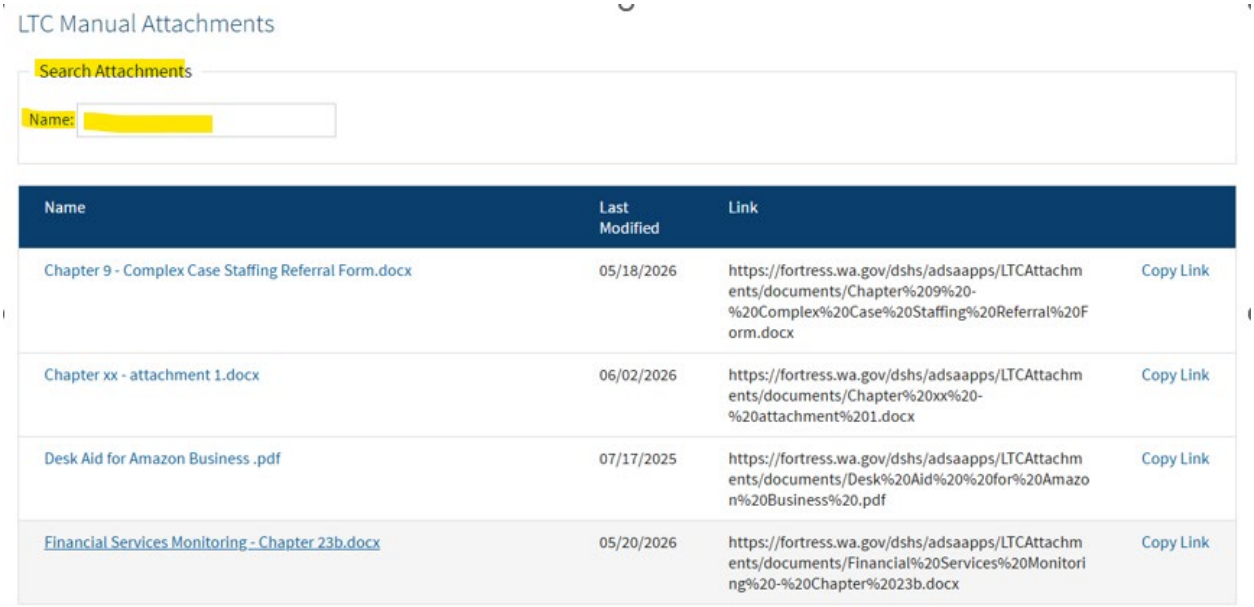
Note: You must have authorized access to the folder before proceeding. If you do not have access to the folder, please contact Jovi Sanchez directly.

- **Start by clicking on this link to open the folder: \\dshswboly2411c\LTCAttachments**
- **To view or search attachments and links:** Go to the following web site: **https://fortress.wa.gov/dshs/adsaapps/LTCAttachments/Default.aspx**

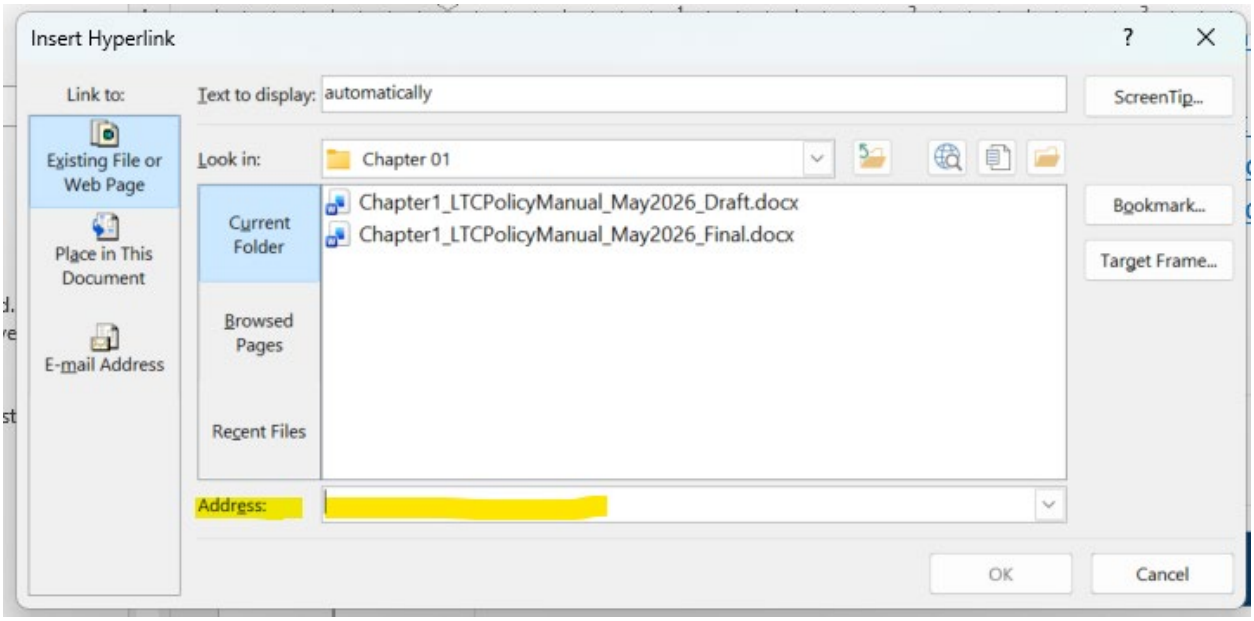
This web page will display all the uploaded attachments along with the date they were modified, and the link for each attachment to include in the desired LTC Manual chapter. You can copy that link manually or click the "Copy Link" option which will automatically save the link to your clipboard.



Use the **Search** feature to quickly find attachments by name or chapter number.



- **Include links to attachments in LTC Manual chapters:**
  To include the link in chapter, simply paste the copied link into the document by highlighting the text naming the document, right click and click on the work "Link" from the drop-down menu. Ensure you have selected to link to Existing File or Web Page, then paste the copied link into the address bar (see below image).



HOW TO CREATE A NEW CHAPTER

When the need is identified to create a new chapter the policy owner should consult with their supervisor or office chief prior to drafting that chapter. In the creation of the new chapter, it would be ideal to lay out the information that must be conveyed and any questions that could be asked and answered to assist in the operationalization of any processes. Once the draft is completed, it should be vetted with each office chief's teams and the W4A with a point person for each team to collect and share back any feedback. When comments and corrections are returned, the author should carefully work through this information looking for themes and how or if comments will be accepted. A response on what is and is not accepted should be provided to the point person(s) that comments were received from.

If the chapter is created outside of the triannual chapter update cycle, please follow the MB process for release. In this process, an MB would be submitted to the MB Coordinator and once approved, it would be posted to the MB intranet page. *It will NOT be posted on the LTC Manual webpage at this point.* At the next triannual cycle, the chapter can be integrated into the LTC Manual by following the process in the *What is the Process for Coordinators and Policy Owners When Completing Chapter Updates During the Triannual Cycle?* section for next steps. The draft of any new chapter would be the equivalent of the "draft updates" referenced in the flow chart and section.

When and How Should a Chapter be Dissolved?

Any policy owner or program manager may petition for the dissolution of a chapter. The process to dissolve a chapter should be enacted when a program or service has been suspended permanently or when legislative actions or administrative/departmental changes necessitate it.

Once the decision has been made it is necessary to dissolve a chapter, identify who needs to know (office chiefs, program managers, directors, etc.) and how you will communicate this change to that group. This can be worked on while the request navigates through the review and approval process. Much like the process to create a chapter, the request to dissolve a chapter should be submitted to the requestor's office chief for review first. After the requestor's office chief gives approval, that office chief should then submit the request to the office chief team for review. If the office chief team deems that request necessary, they would then submit this request to the division director to review and approve. If approval is received, notify the LTC manual coordinator of the dissolution of the chapter. It would then be appropriate to communicate this change thoroughly to the regions/AAAs and all policy owners/invested parties whose work will be impacted by the change. The last step of the chapter dissolution process is for the LTC manual coordinator to contact the webmaster team to have the chapter removed from the *LTC Manual website* at the next chapter update cycle.

HOW TO MAKE CHAPTERS ACCESSIBLE

The Department of Social and Health Services (DSHS) policy requires staff to make documents easy to access and read not only for our clients, but also for our staff. Accessibility in chapters encompasses everything from creating the appropriate size of text and contrast to using plain language. Each element of accessibility in chapters or management bulletins is crucial for inclusiveness and ensures that every staff member, including those with disabilities, can access and understand the information. One way to ensure the accessibility of a document is by utilizing Microsoft Word's Accessibility Checker from the beginning.

DSHS has created guides to assist in making Word or Portable Document format (PDF) documents accessible. These can be found by clicking the following hyperlink: *Accessibility Resources and Training*. Additionally, free courses on using plain language in writing, creating more accessible PowerPoints, Word documents and Excel spreadsheets are available at the Washington State Department of Enterprise Services. Training Professional Accessibility Resources are also offered here.

To use the Accessibility Checker, navigate to the Review tab at the top of the Word document, then click Check Accessibility. The Accessibility Checker will then open on the side of the document, identifying any errors, warnings and tips that it finds. You can then address these issues and rerun the checker.

It is also possible to enable the Accessibility Checker to run while working on a Word document, which will provide real-time feedback on accessibility issues. To do this, go to File > Options > Ease of Access and check the box next to "Keep accessibility checker running while I work".

For more information, resources, and to identify training opportunities related to accessibility, please see the *Resources* section of this chapter.

ROLES AND RESPONSIBILITIES FOR THE CREATION AND MAINTENANCE OF MANAGEMENT BULLETINS

Management bulletins are how the Home and Community Living Administration (HCLA), formerly the Aging and Long-Term Support Administration (ALTSA), communicates and disseminates information to staff, community partners, tribal governments, and others about changes to information, procedures and policies.

What is the Role of the Management Bulletin Coordinator?

The role of the management bulletin (MB) coordinator is to assist in moving MBs through the review and approval process. In the *How and When to Write a Management Bulletin (MB)* section, the management bulletin process is explained in greater detail. It is the management bulletin coordinator that works behind the scenes to ensure that the workflow progression and necessary approvals and signatures are received for all MBs before they are released. It is important that policy owners draft MBs to be responsive to any requests or timeframes provided by the management bulletin coordinator to ensure the timely release of information.

The MB Coordinator is responsible for tracking, storing and archiving management bulletins.

- The MB coordinator enters status data on all MBs into a spreadsheet and tracks this data for the life of the MB from creation to either integration into chapter or rescission. This spreadsheet is used solely for the MB coordinator's internal workflow process.
- When an MB is signed during the final stages of the approval process, the MB coordinator enters the appropriate information into the MB log and assigns the MB number. The MB coordinator then renames the MB according to its newly assigned number and enters the heading and date of posting to the MB.
- The MB coordinator posts the final MB to the HCS Management Bulletin site, notifying community partners, tribes and staff of its implementation.

How and When Does a Policy Owner Write a Management Bulletin (MB)?

Ideally, a management bulletin would be utilized as a short-term (1-year or less) update with the goal of placing the information into chapter at the next chapter update. Not all management bulletins need to be integrated into chapters, but all management bulletins do need to be reviewed tri-annually for relevance and to determine the best path forward for the MB, whether that be rescinding, integrating into chapter or maintaining the MB as is.

Be mindful that the Management Bulletin process can take 4 or more weeks to complete.

In creating an MB, it is important to be very clear on the following:

- What information needs to be communicated and to whom;
- What the impact/change will be;
- If other programs will be impacted; and
- For how long the change will be in place.

It is also important to determine what type of MB is needed.

For assistance drafting MBs, utilize the *Management Bulletin Writing Instructions*. It can be located on the *HCS/AAA Intranet site > Management Bulletins > Tutorials > MB Writing Instructions*. These instructions will assist in the formulation and execution of the management bulletin.

Another helpful link on the *HCS Management Bulletin intranet site* is the *Guide to the MB Process*. This can be found on the *HCS/AAA Intranet > Management Bulletins > Tutorials > Guide to the MB Process.* In this document, you can review the MB Process and receive step-by-step instructions for completing the MB cover sheet entitled the *Management Bulletin Initial Draft Guide*.

What are the Three Types of Management Bulletins?

There are three basic categories of MBs: informational, procedural and policy/policy and procedure.

- A **Policy/Policy and Procedure Management Bulletin** would be warranted if policy and/or procedure were created or need to be updated/clarified as quickly as possible and communicated to all staff. This is information that cannot wait until the next triannual chapter update to be disseminated.
- An **Informational Management Bulletin** would be appropriate if there is a situation where information needs to be disseminated quickly, but it is not related to implementing or clarifying policy or procedure (e.g. training schedules).
- A **Procedural Management Bulletin** would be selected if the change is temporary and only impacts internal processes, but not the greater policy.

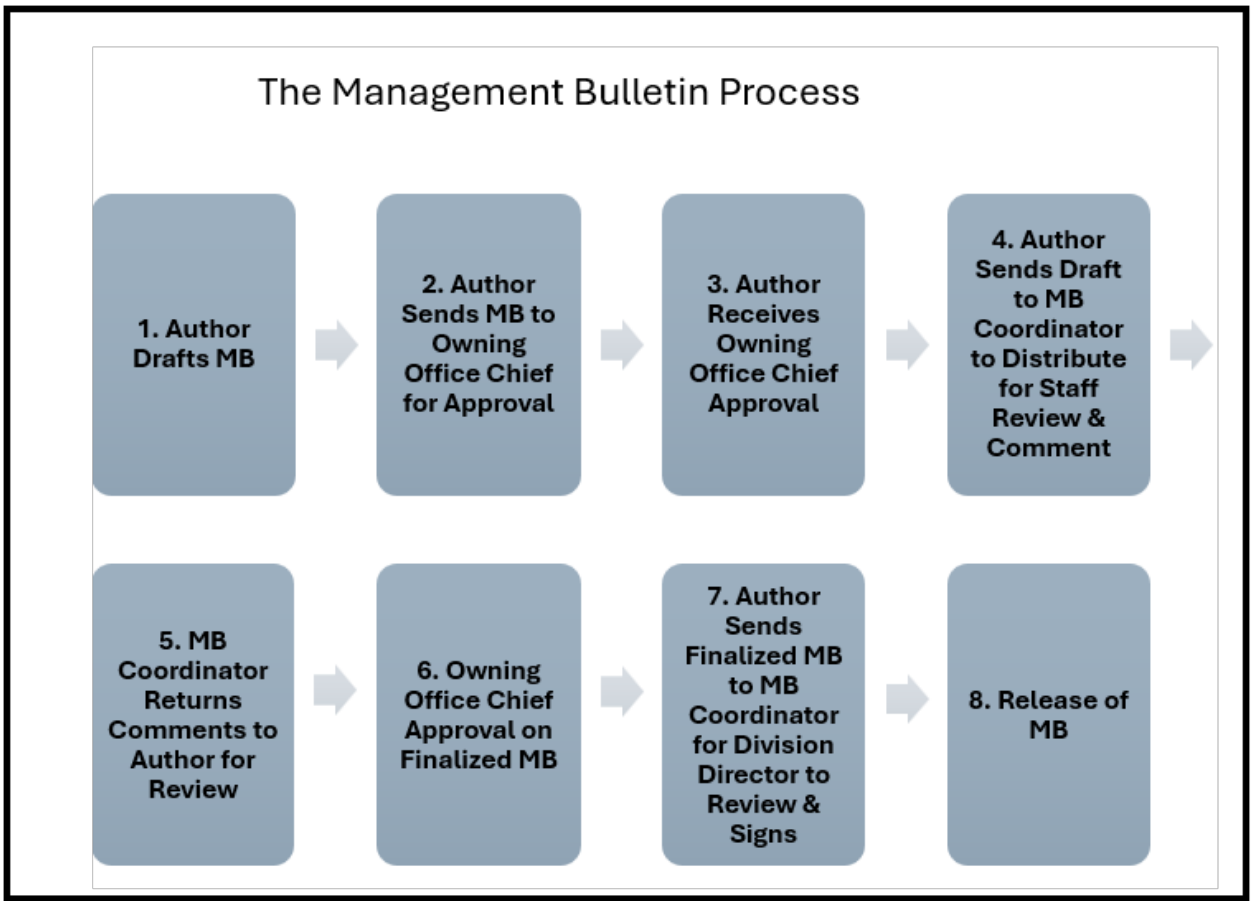
If the identified content is good information to share, but ultimately won't affect policy or procedure, a Management Bulletin would NOT be warranted. In this scenario, it is best practice to wait for the next chapter update to integrate this information into chapter.

What Review Process is Needed for Management Bulletins?

Once a management bulletin is in place, timely reviews are needed. Examine if the information in the management bulletin is a temporary or permanent update to policy. Set a reminder to add the information that is permanent policy into chapter at the next scheduled update. Once updated in chapter and mentioned in the chapter update, the MB can be rescinded stating that it has been moved into chapter and to point all regional/AAA policies to that section of chapter. Please see the *Role of Policy Owner in Transitioning Management Bulletins to Chapter* section for more detail.

If an informational management bulletin is temporary and does not need to go into chapter, set a timed reminder on your calendar to revisit the information. If the MB has been extended, amend the MB to reflect the new extension date. If it was not updated AND won't become permanent policy, rescind the MB and this would indicate the information has not been extended.

How Do Policy Owners Engage in the Management Bulletin Process and Collaborate with the Management Bulletin Coordinator?



As the above graphic shows, it will take eight steps to go from the drafting of an MB to its release.

1. The work begins with drafting the MB. At this stage, the author should include all necessary collaborators, such as subject matter experts (SMEs), DDA, AAA partners, program managers and/or other policy owners.

2. When the draft of the MB is completed, the author sends it to their office chief for approval.

3. Once approval is received by the owning office chief, the author will send the draft to the MB coordinator via email.

4. Next, the MB coordinator sends the draft out for regional/AAA and headquarters staff on the MB distribution list to review and comment via posting on the intranet at *http://intra.altsa.dshs.wa.gov/hcs/review/admin/*. Five days are allowed for these comments.

5. The comments are then collected and returned to the author of the MB. It will be the author's choice to make edits based upon the comments received.
    - If an **Informational MB** is being submitted, it will not need to be posted for staff to review and comment.

6. After reviewing all the comments, the author will send the finalized document to the author's office chief for final approval.

7. Once the owning office chief's approval is received, the finalized document will be sent to the MB coordinator. The MB coordinator will be forwarded to the HCS director's or their designee for review:
    - If it is approved, the MB will be signed.
    - If edits are requested, the MB will be returned to the author with comments once again.
    - For joint MBs, the MB will be forwarded on to the other division directors or their designees for approval and signature, as well.

8. Once all the steps have been completed, the MB will be released.
    - It is important to note that the effective date of the MB should align with the date of release or posting on the intranet site.

What is the Role of the Policy Owner in Transitioning Management Bulletins to Chapter?

Review management bulletins (MBs) and determine which MBs are temporary policy, and which are permanent policy. If an MB is permanent policy, this needs to be provided as a chapter update. It is at the discretion of the chapter owner whether this additional information will be a new chapter or subchapter or if the MB will be added to an existing chapter or subchapter.

When an MB is transitioned to a new section of a chapter and other areas of HCS collaborated on the work to develop the MB, those other entities should be informed of the transition of the MB into the chapter. This will allow the other entities to make any updates needed on their chapters in conjunction.

Chapter owners will not request off-cycle updates to their chapter unless it is either emergent or immediately effects how case managers perform their jobs. Follow the MB process and integrate changes at the next update cycle.

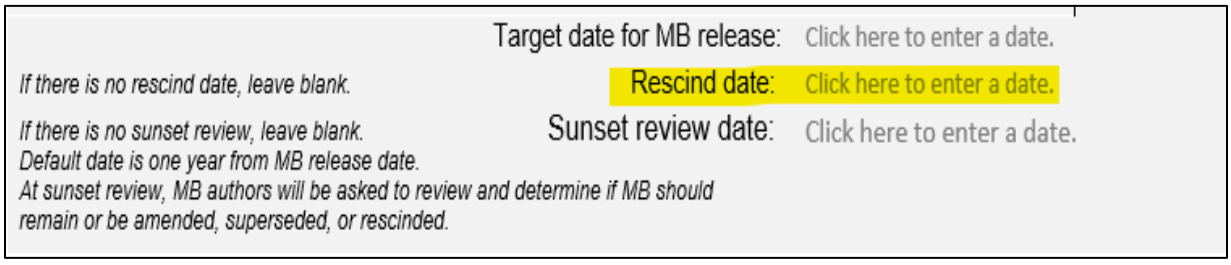
Once the MB has been incorporated into the chapter, the MB should then be rescinded by following the MB rescind process. Chapter owners should rescind MBs if they contain conflicting or outdated policy. For example, if chapter says one thing because it's been updated, but the MB gives different direction, that MB should be rescinded. Unless it is an emergency that immediately affects how case managers perform their jobs, chapter owners are not supposed to request off-cycle chapter updates.

How do Policy Owners Collaborate with the LTC Manual Coordinator on Chapter Update Management Bulletins (MBs)?

The best practice for policy owners is to both complete the appropriate documentation (i.e. The *MB Initial Draft Guide Form* and cover sheet) and respond promptly to any requests the author receives from the LTC manual coordinator. Through the completion of these two steps, completing chapter updates from management bulletins will be simplified.

How to Rescind a Management Bulletin

Rescinding (also referred to as sunsetting) is the process to remove an MB from the Management Bulletin page when the process, procedure, or information has either been incorporated into an LTC Manual chapter or is no longer relevant for case managers. It is important to rescind MBs that are out of date to ensure consistent policy information is provided. For all MBs that are NOT being replaced with a new MB, please send an email to the MB coordinator that includes: the appropriate MB number with the request to rescind, the date for rescission and where this information can be found now. An example of this is:
"In reference to MBxx-xxx, please rescind this management bulletin effective 6/1/2026 as it was incorporated into the LTC Manual Chapter at the last chapter revision cycle."



Once the steps above have been completed, this form is to be sent to the MB coordinator via email for processing along with any additional information or attachments needed.

Tips for Successfully Drafting Management Bulletins

- Start drafting content as early as possible.
- Get input from other SMEs, AAA and community partners.
- If you are drafting a joint MB (with DDA A, Residential Care Services [RCS], or Management Services Division [MSD]), share your draft with your counterparts and other appropriate staff, allowing enough time for their input.
- If content of the MB impacts multiple programs, services, or units, share the MB with the other office chiefs and/or the division director for early input.
- Share the final draft with your office chief for approval. If you get their approval on the draft, you can save time in processing the MB.
- Complete the *MB Initial Draft Guide Form* and cover sheet thoroughly and completely.

- Create a tracking mechanism for the MBs that you manage to ensure that they are maintained properly.

ROLES AND RESPONSIBILITIES FOR REGIONAL AND AAA TEAMS IN COLLABORATING ON POLICY

Effective communication and collaboration between those creating and those implementing policies are critical for functional service delivery. When questions or concerns about the implementation of policy arise, and the *LTC Manual* cannot provide a clear answer, each region should enact their chain of command—depending upon the region and topic in question. Once regional/AAA resources are exhausted and no resolution has been found, the assigned JRP/SHPC or program manager should utilize the *LTC Manual SharePoint site* form to request policy update or clarification from the policy owner. Please see the "*How Regions Can Request a Policy Update or Clarification*" section for more details on escalating questions or concerns.

Policy is in constant review due to adaptation to legislative or programmatic changes and modifications to policy or procedures. It is through the collaborative efforts of regional and headquarters staff that consistency is achieved, especially regarding the creation and maintenance of training materials.

Responsibility of Regional/AAA Staff in Training Material Development

Before creating any one-off training or desktop aid, it is essential to follow these best practices:

1. Review the *LTC Manual* – Always reference existing guidance to ensure alignment with current policies and procedures.

2. Engage subject matter experts – Collaborate with those responsible for the relevant policy area to ensure accuracy.

3. Partner with headquarters program or policy staff – Work together to develop guides, desk aides, publications, and resources that can serve statewide and be incorporated into future chapter updates.

4. All desk aides and training materials must be dated and the chapter it belongs to referenced to ensure that the most up-to-date version is being used and that there is a point of contact for any discrepancies found.

5. Additionally, printed or saved/downloaded to desktop versions of the *LTC Manual* are not recommended, as accessing digital formats ensures access to the most up-to-date information.

By following these steps, we can maintain consistency, accuracy, and statewide alignment in our training materials.

Information received—whether in email, phone, or TEAMs discussion—by regions from policy owners clarifying policy does not negate or override the policy within the chapters of the LTC Manual. Continue to reference the *current LTC Manual* for all policy and procedure information. Regional resources like OneNote or SharePoint should be utilized as a notebook with regional processes rather than a policy source/document.

If regions are considering the development of training materials due to a need to clarify policy, please submit a *request for policy clarification or chapter update* first. These requests enable policy owners to understand the needs of the regions with more clarity.

HOW REGIONS CAN REQUEST A POLICY UPDATE OR CLARIFICATION

When regional/AAA staff find discrepancies, have questions that result in the need for policy clarification, or want to make suggestions for updates, staff should follow this process:

1. Review the matter with your JRP/SHPC or regional/AAA program manager. If the JRP/SHPC or program manager agrees that clarification or update to chapter is needed, the JRP/SHPC or program manager will escalate this request.

2. To escalate the request to the chapter owner, navigate to the "Chapter Revision Requests" tile on the *LTC Manual SharePoint site*, which will take you to the *Request for Policy Update or Clarification* form. Please complete each section thoroughly. You will be asked to provide the requestor's information/contact, the chapter title and number, the section of that chapter of concern, and either include an attachment with proposed edits in track changes to the request or complete the sections requesting information on the chapter situation and proposed change, along with a description of why this change or clarification is being requested.
    a. Access to this request form is limited to HCS/AAA JRPs/SHPCs and Program Managers.

3. This request should be assigned to the appropriate chapter owner when completing this form. If you are unsure of who the chapter owner is, please reference the *LTC Manual Chapter Owners Information* tile on the main page of the *LTC Manual SharePoint site*. If multiple chapter owners are impacted by the request, please direct it to the most appropriate policy owner. It is the responsibility of the policy owner to seek input from and to invite into conversation all impacted policy owners to adequately address the request. Please give the chapter owner up to **seven business days** to acknowledge receipt of the request and **ten business days** total to provide a resolution.

4. There are three possible outcomes that the chapter owner may respond to *chapter update requests* with: accepted, partially accepted and declined. If the suggestion is accepted, it will be integrated into chapter on the next update cycle. If it is partially accepted, an explanation of why will be offered as well as the next steps for the accepted information. If the suggestion is declined, a reason for this decline will be included in the response section of the form. Once

completed, the chapter owner will mark the request as "completed" in the "Status of Request" section of the form.

5. If *policy clarification* is requested, please allow up to **ten business days** for the chapter owner to respond with the needed clarification.

6. If *no response is received* **after ten business days**, the regional/AAA lead should escalate the request to the LTC Manual Coordinator who will continue the escalation of the request to the chapter owner's supervisor and/or Office Chief.

Detailed directions for submitting requests are available in the *How Can JRPs/SHPCs and Program Managers Submit a Request for Policy Update or Clarification?* section.

All AAA/HCS JRPs/SHPCs and program managers will have access to the *LTC Manual SharePoint page* where policy owner's responses to policy clarification requests will be logged. To access this log, you will go to the *LTC Manual SharePoint site*, and navigate to the "Chapter Revision Requests" tile. Rather than submitting a *Request for Policy Update or Clarification* form, you can search the log of completed requests. Please see the *How Can JRPs/SHPCs and Program Managers Access and Search the Log of Resolved Requests for Policy Update or Clarification?* section for more information on this process.

> If a chapter or policy owner receives a request for clarification or chapter update via email or another method, direct the requestor back to the SharePoint site and process to submit their request.

AAA COLLABORATION AND REVIEW PROCESSES

How Should Policy Owners Collaborate with AAA Partners on the Formulation of Policy?

Inviting our AAA partners, along with case management directors at HCS and contract management directors at the AAA, into conversations to collaborate on policy formulation ensures that both the AAA and HCS can support and implement the intended change(s). Please allow adequate time for AAA partners to review and provide feedback on requests for input. W4A appreciates being a part of early conversations that may impact the work done by the AAAs. Implementation of Management Bulletins or chapter updates go markedly smoother when collaboration that integrates AAA staff input is sought out.

How are Policy Updates Communicated to the AAA?

Communication with AAA's W4A team typically goes through the State Unit on Aging (SUA) Office Chief, who is the single point of contact for management bulletins at the AAA. These communications are shared with all AAA directors. Management bulletins are categorized to be either high- or low-impact.

For any changes that have a higher impact on the work being done by the AAAs, seven to ten business days are needed to gather feedback and address the feedback with the appropriate office chief.

Any time that policy impacts all case managers or contracts at the AAA, notification needs to go through the W4A for review prior to chapter submission. This communication is expected to come from the policy owner.

How is Risk Assessed by the AAA?

AAA staff assess impact by considering both the risk and workload impacts at the AAAs. If a management bulletin or chapter update increases both the case managers workloads and the risk associated with the work, it would be considered a "high-risk" impact. The calculation of risk can be somewhat subjective to AAAs, but it is considered high if there is an increased likelihood for poor client outcomes with an increased potential for litigation against the AAA. Conversely, if the update is a rarely applied policy, then it would be deemed a "low risk" impact.

How Does the AAA Provide Feedback on Requests?

When the notification is received by the State Unit on Aging (SUA) office chief, they will send an email, cc'ing the requestor and any other necessary parties, making the request to preview the policy update to the W4A executive director and chair. The executive director and chair will disseminate this information and solicit feedback from key AAA staff. Typically, feedback is requested to be returned within a week, depending upon the content of the proposed update. The W4A executive director compiles the feedback from the AAA partners and provides it back to the original requestor.

SHAREPOINT COORDINATION PROCESSES

A SharePoint site has been constructed to make the LTC Manual update process more efficient. The SharePoint site can be accessed here: *LTC Manual SharePoint page*. This will be a shared workspace designed to make the policy update processes more efficient. The key features of this site are:

- Access to the most recent PDF of the compiled, searchable LTC Manual and link to the LTC Manual website.
- Shared space to maintain draft versions of LTC Manual updates for the LTC manual coordinator to quickly access.
- Shared space for finalized chapter updates to be held, entitled, *Finalized LTC Manual Chapters*.
    - The program managers or policy owners will place files into this folder after they've successfully navigated the approval process.
    - The webmaster team will access these finalized files from this folder to post on the public facing *LTC Manual website*.

When saving documents to the "LTC Manual Chapter Draft" or "Finalized LTC Manual Chapters" folders, policy owners should utilize the appropriate naming convention for of drafts of "**Chapter #_short title_date_draft"** or for finalized documents of "**Chapter #_short title_date_final**" (e.g. **Chapter1_LTCPolicyManual_June2025_final**).

- Quick access links to lists of chapter owners and subject matter experts (SMEs) and their respective fields. This information can aid in the collaborative efforts for joint management bulletins or chapter updates.
- A request form with tracking mechanisms for policy clarification or update requests with an associated log.
    - This request form and log will be accessible only to program managers and JRPs/SHPCs at HCS and AAAs.
    - The log will serve as an efficient way to communicate the resolution of submitted requests statewide, thus reducing or eliminating the need for redundant responses for policy owners.
- Access to Chapter 1: The LTC Policy Manual: Roles and Responsibilities and the active links for all resources contained within it.

The basic flow for LTC Manual chapter updates on the SharePoint site during an open triannual review period are as follows:

1. Policy/chapter owner makes edits to their LTC Manual chapter Word document in the chapter's assigned folder on the LTC Manual Drafts folder. Obtaining Office Chief/Unit Manager's approval, as instructed.

2. Once all necessary edits are made, notify the LTC manual coordinator that the chapter (with track changes showing) is ready for staff review & comments, along with 3-5 bullets summarizing the updates made.

3. Comments are provided back to the LTC manual coordinator, who shares this information with chapter owners.

4. Policy/chapter owners can either incorporate the suggested information into their draft Word document or decline the suggestion. If information is updated in chapter, obtain the necessary office chief or unit manager's approval before finalizing the chapter.

5. Accept all necessary track changes and finalize the chapter before moving the document into the Finalized LTC Manual Chapters folder.

6. Notify the LTC manual coordinator that your chapter is ready and in the correct SharePoint folder.
   *Please use the appropriate naming conventions when uploading files to the LTC Manual SharePoint folders.
   LTC Manual Drafts: "Chapter#_ShortTitle_MonthYear_Draft"

Finalized LTC Manual Chapters: "Chapter#_ShortTitle_MonthYear_Final."

Who Can Access the Various Tools on the LTC Manual SharePoint Site?

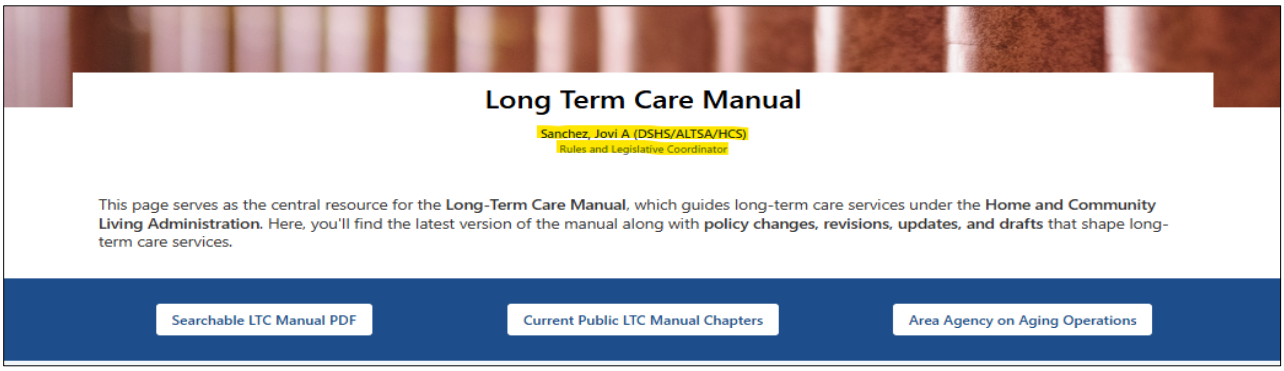
The LTC Manual SharePoint site is primarily a tool for JRPs/SHPCs, regional program managers and HQ policy/chapter owners. Access for JRPs/SHPCs and program managers from both the AAA and HCS has been granted to ensure that information is distributed timely and consistently. Program managers and JRPs/SHPCs will be able to access the form to request clarification or update to policy and the log of all previously submitted requests. HQ policy/chapter owners will have full access to the entirety of the SharePoint site. The following diagram depicts what job classifications have access to viewing and/or editing rights, ability to request policy clarification or updates and access to the policy clarification or request log.

Job Title	Viewing Rights	Editing Rights	Ability to Request Policy Clarification or Updates	Access to Policy Clarification or Request Log
Case Managers	No	No	No	No
Supervisors	No	No	No	No
JRPs/SHPCs/Trainers	**Yes**	No	**Yes**	**Yes**
Program Managers/ FSAs	**Yes**	No	**Yes**	**Yes**
Policy Owners/ Chapter Owners	**Yes**	**Yes**	**Yes**	**Yes**

**With the exception that JRPs/SHPCs/Trainers and Program Managers/FSAs will be added as contributors to the SME page/library on the LTC Manual SharePoint site to upload and maintain the regional SME contact lists.

What Process Can Policy Owners Follow to Access the LTC Manual SharePoint Site?

The LTC Manual SharePoint can be accessed easily by clicking the following hyperlink: *Long-Term Care Manual SharePoint site*. If you need access to this site, but currently do not have it, please contact the site administrator directly. The site administrator is noted directly below the image banner and main title of the page (see image below with site owner information highlighted).



How do Policy Owners Access Chapter Drafts on the LTC Manual SharePoint Site in Preparation for the Next Revision Cycle?

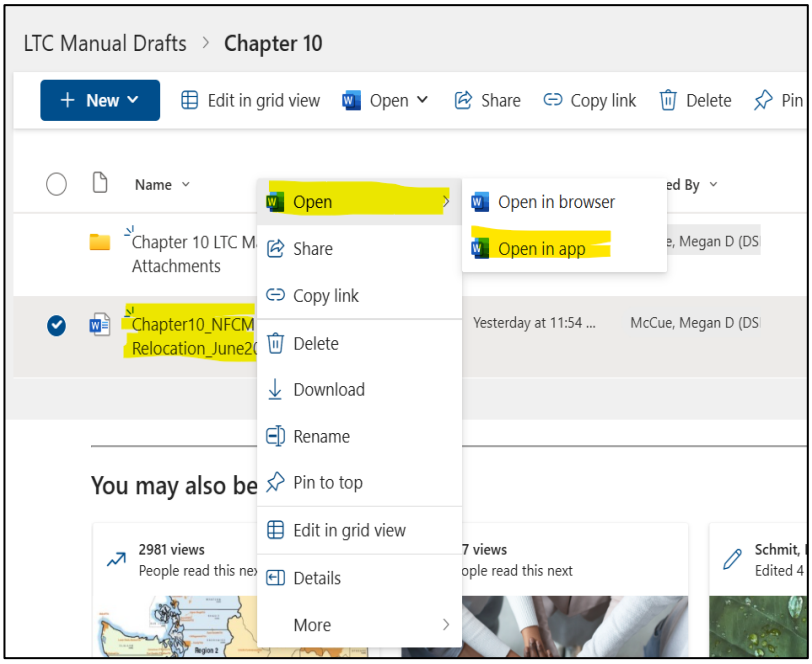
The most recent files for each chapter will be found in the "LTC Manual Drafts" folder on the SharePoint site.

1. To access the most recent files of chapters on the LTC Manual SharePoint site, please click on the following link: *Long Term Care Manual*.

2. Scroll down to the "LTC Manual Drafts" button or utilize the following hyperlink to navigate directly to the LTC Manual Drafts library: *Long Term Care Manual Drafts*.

3. Locate your chapter's folders. Each chapter has its own folder that contains the most recently updated chapter and subchapter files. These folders are not arranged in numeric ascending order. **Please note that we use a specific naming convention for these files. Please continue with this naming convention. An example of the naming convention is **Chapter 1_LTC Policy Manual_June2025_Draft.**

4. **Access your draft.** Each draft can be found in the appropriate folder. If you double click the link, this will open the BROWSER view of your file. This view, at times, appears to have formatting issues that the application or Desktop version does not have. Because of this, it is recommended to open your draft file in the Word App. To do this, right-click on the file name of your file, hover over or left-click "Open," then hover over and left-click "Open in app" (see below).



5. **Make updates to your chapter.** Each file when opened in the app will be set to "auto-save" any of the changes/updates you make. Continue to update this file and maintain it in this drafts folder. When all your edits have been completed, you can notify your office chief to review for their approval and notify the LTC manual coordinator that the draft is ready to be shared out for comments.

6. Before the chapter can be finalized, the following must be completed:
   a. Integrate all accepted comments into the chapter,
   b. Final edits have been made,
   c. Track changes have been removed/accepted, and
   d. Links have been checked and verified for accuracy.

7. Once these steps are completed, your program manager or their designee can drop the finalized file (following the appropriate naming convention, e.g. *Chapter 1_LTC Policy Manual_June2025_Final*) into the *Finalized LTC Manual Chapters* folder. Once the files have been vetted by the LTC manual coordinator to ensure they are in a finalized state and are uploaded to the LTC Manual webpage, the LTC manual coordinator will archive the files into a dated folder (e.g. June 2025 Finalized Chapters). This is where the finalized version of the LTC Manual will be compiled into the single PDF document.

How do Policy Owners Work on Chapter Drafts in the LTC Manual Chapter Draft Folder on the LTC Manual SharePoint Site?

The LTC Manual SharePoint can be accessed easily by clicking the following hyperlink: *Long-Term Care Manual SharePoint site*. Under the banner and main title of the page, you will find a tile entitled *LTC Manual Drafts*. This folder is where policy owners collaborate with co-owners and work on the most up-to-date version of the chapter in preparation for a future triannual cycle. Think of it as a living

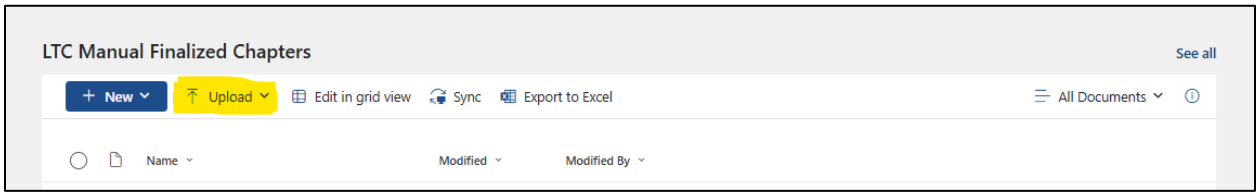
document where all revisions and edits can be made. It is important to follow the naming conventions found in the *What is the Process for Coordinators and Policy Owners When Completing Chapter Updates?* section of this chapter. The finalized draft document in your draft folder will, at the end of the revision process, be the document that you will rename and begin updating or reviewing, if updates aren't warranted, for the next chapter revision cycle.

- For example, the document named Chapter1_LTCPolicyManual_June2025_Draft can be re-named Chapter1_LTCPolicyManual_October2025_Draft.

Once re-named, you can begin making edits to be integrated at a subsequent revision cycle. You should not have to upload any documents into these draft folders unless you are creating a new chapter or subchapter.

How do Program Managers (or Their Designees) Upload Finalized Chapter Drafts into the Finalized LTC Manual Chapter Draft Folder on the LTC Manual SharePoint Site?

To upload documents into the *Finalized LTC Manual Chapters* folder, simply open the folder, click the upload action button (noted below) and locate the appropriate file to upload.



Once each tri-annual period ends, the LTC manual coordinator will review the finalized documents before moving them into an archived dated folder (e.g. June 2025 Finalized Chapters), in case they are needed for future reference. The webmaster team will utilize the identified folder to retrieve chapters to be posted on the *LTC Manual webpage.*

Both of the above changes to attachments will require also updating the link in the chapter itself. This should be saved for chapter updates and not utilized in between update cycles.

How Can JRPs/SHPCs and Program Managers Submit a Request for Policy Update or Clarification and How do Policy Owners Respond to Said Request?

The LTC Manual SharePoint can be accessed easily by clicking the following hyperlink: *Long-Term Care Manual SharePoint site*. Scroll down until you locate the tile entitled, "Chapter Revision Requests." By clicking on this tile, you will be directed to a SharePoint list entitled *Policy Request Updates or Clarification Log*. Here you will click the blue tile entitled, "+ Add new item" To complete the form, you will provide the following information:

1. Brief description of the request

2. Your name or email address

3. Date of request (auto-populates)

4. Chapter name and number related to request

5. Chapter owner name or email
    a. There will be a list of chapter owners on the main page, if you are unclear who to address the matter with. The LTC manual coordinator is also able to assist with assignments, if additional support is needed. This section can be left blank at initial submission.

6. Description for planned action request
    a. Outline the matter that prompted the request for clarification or update
    b. Outline your proposed change or clarification
    c. Describe why this change or clarification is being requested
    d. Attaching track changes in a word document is also acceptable to address a & b above and can be done at the bottom of the form page.

Once the request has been completed, press "save", and the request will be sent to the policy owner.

The remainder of the form will be completed by the chapter or policy owner. When a request is assigned to a policy owner, that policy owner will receive an email with a link to the item that needs their attention. To respond to the request, the policy owner will open the item and click "Edit All," the policy owner can then complete their initial response or final response and click "Save" at the bottom of the page.

The information that policy owners will be responsible for in the request form includes:

1. Date of initial response by chapter owner

2. Chapter owner response

3. Additional comments from chapter owner to explain if the request was either accepted, partially accepted, or declined and provide a why.

4. Date matter was addressed by owner
    a. This is the date that the matter was fully resolved.

5. Change Status of Request to either "In Progress" when you are working on the request or "Completed" when the final response has been entered.

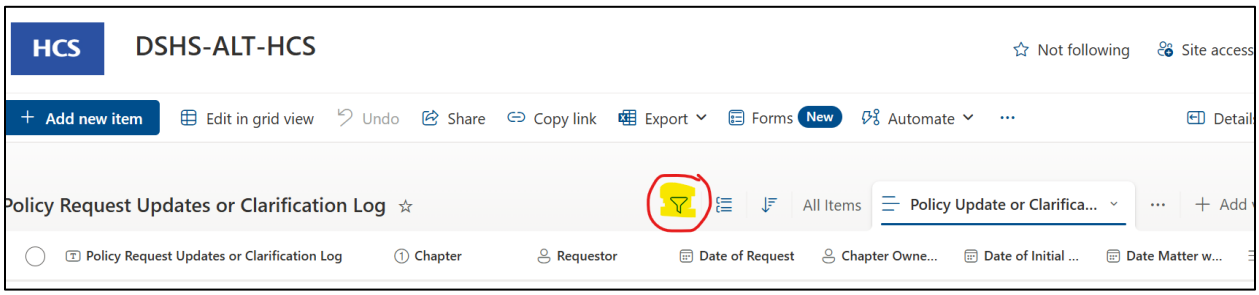
6. Please hit "Save" before closing out the request screen.

How Can JRPs/SHPCs and Program Managers Access and Search the Log of Resolved Requests for Policy Update or Clarification?

JRPs and program managers should be granted access to the log of resolved requests on the *Long-Term Care Manual SharePoint site*. If you do not have access, please reference the *What Process Can Policy Owners Follow to Access the LTC Manual SharePoint Site?* Section.

From the LTC Manual's main SharePoint site, you will scroll down until you locate the tile entitled, "Chapter Revision Requests." By clicking on this tile, you will be directed to a SharePoint list entitled *Policy Request Updates or Clarification Log*.

In this SharePoint list, you can search all resolved requests by filtering the items by "status of request". You can also utilize the filter feature to search by chapter name, chapter owner or title. You may also utilize the filter icon shown highlighted below:



RESOURCES

Accessibility Resources

WebAIM: Contrast Checker
Plain language guidelines | Governor Bob Ferguson
Training Opportunities to Learn More About Accessibility: Auditing for Accessibility Series | DSHS News
DSHS guides on making word and pdf documents accessible: Accessibility Resources and Training

Chapter and MB Resources

Management Bulletin Writing Instructions
Guide to the MB Process
Blank HCS Management Bulletin Initial Draft Guide
Chapter Template and Style Guide 2025

Acronyms

AAA	Area Agencies on Aging
ALTSA	Aging and Long-Term Support Administration

DDA	Developmental Disabilities Administration
DMS	Document Management Services
DSHS	Department of Social and Health Services
HCLA	Home and Community Living Administration
HCS	Home and Community Services
JRP	Joint Relations Procurement
LTC	Long-Term Care
MB	Management Bulletin
MSD	Management Services Division
RAC	Recipient Aid Category
RCS	Residential Care Services
SER	Services Episode Records
SHPC	Social and Health Program Consultant
SME	Subject Matter Expert
SUA	State Unit on Aging
W4A	Washington Association of Area Agencies on Aging

REVISION HISTORY

DATE	MADE BY	CHANGE(S)	MB #
July 2026	Megan McCue	Chapter updated to clarify MB and chapter revision processes, revert DDCS to DDA, and update LTC manual attachment process	
April 2026	Megan McCue	Chapter updated to adjust DDA to DDCS	
June 2025	Megan McCue	Chapter creation	

APPENDIX

Management Bulletin Writing Instructions
Guide to the MB Process
Blank HCS Management Bulletin Initial Draft Guide
Chapter Template and Style Guide 2025