

ISSUANCE SYSTEMS
(No. 10 February 2002)

2020

The F.I.R.M. Unit's functional systems can be divided into three elements, each with distinct contributions to the stated goal. Those elements are: research and analysis, information systems (in the form of handbook directives and amendments), and reference systems.

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RESEARCH AND ANALYSIS
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Both information systems and reference systems rely on research and analysis to provide quality assurance for those systems. Research and analysis lays the groundwork for organization and consistency of the administrative information system. It provides an ongoing analysis of information released throughout the department, with the goal of guaranteeing consistency, preventing redundancy and ensuring that the method of dissemination used is appropriate to meet the department's changing needs.

Whenever there is a need to provide direction or clarification on an issue, the administrative information coordinator with that program responsibility will send a final draft copy of the resulting document(s) to the F.I.R.M. Unit for processing. Documents submitted to F.I.R.M. will be accepted as submitted, that is, material must be in final form and complete, including all referenced exhibits and attachments. This material will be distributed without further review. However, upon request an analyst in the F.I.R.M. Unit will then conduct a review of the proposed document for:

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- style, spelling and punctuation
- content clarity
- section numbers
- cross references

After completing the requested review, the analyst will consult with the program's administrative information coordinator on recommended changes resulting from the review, and other issues including but not limited to determination of the proper vehicle for distribution based on the intended use, audience and immediacy of the information. Depending on the results of the research and analysis, the document should be processed either as a component of the information systems containing information or instructions which may be urgent and/or meaningful for a generally limited period of time (one year) — “handbook directive;” or of the reference systems containing information or instructions which are meaningful for an unspecified period of time—CDF procedural handbooks that are “amended,” as necessary.

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INFORMATION SYSTEMS

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DIRECTIVES

2020.2.1

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Directives are used to distribute specific procedural or broad general information to a large audience. Their distribution may be tailored to specific audiences, therefore having a wide subject application. Their versatility has enabled directives to replace documents such as Director's Policy Letters, Management Services Letters, and Labor Relations Letters.

Handbook Directives

Handbook directives are an effective means of disseminating urgent handbook-specific policy or procedural information within the department. Handbook directives are also appropriate to distribute information relevant for a specific time period. These directives are delivered via CDF's electronic messaging system, and are available to view within the Outlook Public Folders system.

Distribution of handbook directives must not replace handbook amendments. Administrative information coordinators should ensure that these directives are made part of the handbook via amendment where and when appropriate.

The effective duration for a handbook directive **should not exceed one year unless specified by the appropriate administrative information coordinator**. In those cases when a handbook directive is issued pending release of a handbook amendment, the originating unit is responsible for ensuring that the amendment is prepared for distribution prior to the expiration of the directive.

A handbook directive template is available ([see directive template](#)) for staff convenience. Please note: the administrative information coordinator is the liaison to the F.I.R.M. Unit; handbook directives will only be accepted from the designated Administrative Information Coordinator.

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General Departmental Directives – not handbook-specific

It is recognized that not all vital information relates to a specific handbook. The F.I.R.M. Unit will provide access via the Outlook Public Folder system to general directives distributed by other program units in those cases in which our office has been made aware that such distribution has taken place. Please note: F.I.R.M. will not ensure that general directives have received proper review and approval, and will provide access to these directives **as a courtesy only**.

HANDBOOK AMENDMENTS

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Amendments to handbooks may be necessary for updating, defining or initiating policy or procedures. Issues that may need to be addressed in a handbook amendment may be identified in several ways:

- Managers within the department may contact the program unit directly to indicate where amendments may benefit the handbook.
- Identification may come in feedback from users through administrative information officers and program managers. That information is then forwarded to the assigned administrative information coordinator in the responsible program unit.
- Amendments may also be necessary as a result of changes in policies, regulations, or laws, and identified by the program's management or staff.

Regardless of where or how the need to update a handbook originates, the administrative information coordinator is the liaison to the F.I.R.M. Unit, and handbook updates will only be accepted from that liaison.

REFERENCE SYSTEMS

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The foundation of the administrative portion of the department's reference system is the State Administrative Manual (SAM). Co-produced by the Departments of Finance and General Services, SAM provides procedures for administrative functions in all state departments. Reference publications produced by CDF include the thirty-five handbooks that comprise the Issuance Library.

[\(see next section\)](#)

[\(see HB Table of Contents\)](#)

[\(see Forms or Forms Samples\)](#)