



OKDHS Document Standards

a. **General statement of purpose**

These standards contain the guidelines by which OKDHS documents are formatted, developed, or designed.

b. **Scope**

These standards pertain to any document that serves an official purpose for OKDHS, and includes documents transmitted intradepartmental, interdepartmental, or external to persons receiving OKDHS benefits or services, vendors, or the general public. When there is a higher state or federal statute, rule, regulation, or requirement, these standards will be superseded.

c. **Terms and definitions**

1. **"OKDHS document"** means any materials, by whatever means generated or reproduced, printed, or electronic, used for the purpose of gathering or providing information or requiring action in any transaction involving the public, persons receiving OKDHS benefits or services, or another OKDHS division. OKDHS documents include forms, OKDHS appendices, codified appendices, notices, legal pleadings, memos, standards, or letters.
2. **"Document central clearinghouse"** means the function within the Office of Planning, Research, and Statistics (OPRS) that ensures OKDHS documents meet the specified standards in effect at any given time.
3. **"Template"** means a document having a preset format, used as a starting point. A template is not password protected and has no form fields.

d. **Purpose.** OPRS:

1. ensures, in conjunction with the Office of Legislative Relations and Policy (OLRP), that content of OKDHS documents adheres to the Administrative Procedures Act (APA);
2. safeguards OKDHS document content changes that may affect other divisions;
3. ensures OKDHS documents adhere to these standards;
4. provides a central location where all OKDHS documents are accessed; and
5. maintains a log of all OKDHS documents.

e. Requirements**1. General**

- A. Each division creates its own documents for submission to OPRS, unless requested otherwise. Each request must include a completed Form 21AD083E (ADM-83-A), Request for Document Assistance.
- B. Each document is assigned a unique document number by the division or OPRS using Appendices 21AX003E (ST003E), OKDHS Document Division Codes, and 21AX004E (ST004E), OKDHS Document Category Codes.
- C. All documents, whether new, revised, or revoked; printed or electronic, must be submitted to OPRS for review.

2. Style

- A. Word documents with form fields must be password protected. OPRS will do this.
- B. Shading is only used when there is no text
- C. Reverse text, white text on a black or colored background, is not used.
- D. Tables must have headings and columns related unless they are used for formatting. Heading row repeat must be defined if they are heading and columns related.
- E. Underscoring of text is avoided, unless it is to indicate new language or a hyperlink.
- F. Form fields that do not have labels contain default text.
- G. Any form with the word "application" in the document's name or intention must be made accessible on the Internet and included in the Application category.
- H. Address and name must have one form field and label or multiple form fields, with a separate label for each form field. Area code must have its own form field.
- I. Only the state and OKDHS logos may reside at the top of the document. Any other logo may reside at the bottom of the document. All logos must have alternative text.
- J. Unicode bullets may be used for lists; no images or wingdings are allowed.
- K. A check box must be placed after the text to which it refers.
- L. Abbreviations may not be used.
- M. With the exception of OKDHS, the first time an acronym is introduced in a document it must be defined by writing out the words, followed by the acronym in parentheses. After an acronym has been introduced in a document it may be used throughout the remainder of the document.

- N. A form or appendix is referred to by the number followed by the name the first time it is used in a document. After the first usage, the form or appendix is referred to by the number.

3. Layout

- A. Fonts. Font requirements apply to all aspects of a document.

- i. Document text must be at least Arial 12 point font.
- ii. User entered text must be at least Berlin Sans FB 12 point font. Templates must be Arial 12 point font or larger for the entire document. Doc Gen documents must be font Times 12 point or larger for the entire document.
- iii. 3 of 9 bar code for Doc Gen is medium size; all others are 26 point font. Templates do not require a bar code.

- B. Margins. Margins are at least one inch on all sides on all pages.

- C. Headers.

- i. The header resides inside the top margin, located one-half inch from the top edge.
- ii. The first page header may:
 - I. exceed one-inch margin requirement and follow the layout of the OKDHS letterhead;
 - II. exclude an address when return correspondence to document originator is not necessary;
 - III. include a 3 of 9 encoded bar code located at top center, containing an asterisk (*), the document number, a dash, a revision indicator and an asterisk (*) in 26 point 3 of 9 font. The revision indicator is for the Imaging project only. All document revision indicators start at 001;
 - IV. include OKLAHOMA DEPARTMENT OF HUMAN SERVICES appearing 15 points under the bar code in the official logo font face at 12 point, and is otherwise identical to the title under the official logo;
 - V. include the document title on first page, within or below the top margin, and centered; and
- iii. First page header of a two-window envelope document contains:
 - I. return address 0.3 inch from the top of the page and one inch from the left of the page;
 - II. postal bar code 1.8 inches from the top of the page and one inch from the left of the page;
 - III. delivery address 2.1 inches from the top of the page and one inch from the left of the page; and

- IV. 3 of 9 bar code 4.5 inches from the left and 0.4 inches from the top, containing an asterisk (*), the document number, a dash, a revision indicator, and an asterisk (*), followed by the OKDHS logo. Medium size bar code font is used for DocGen project; all others are 26 point font.
 - iv. The even numbered page header contains:
 - I. the document number aligned on the left margin;
 - II. the document name aligned on the right margin; and
 - III. a bottom border separating header from body.
 - v. The odd numbered page header contains:
 - I. the document number aligned on the right margin;
 - II. the document name aligned on the left margin; and
 - III. a bottom border separating header from body.
- D. Footers
- i. The footer resides inside the bottom margin, located one-half inch from bottom edge.
 - ii. The first page footer contains a:
 - I. document issued date or revised date aligned on the left margin. Example: OKDHS issued 10-10-2007 or OKDHS revised 10-10-2007;
 - II. document number centered;
 - III. page number aligned on the right margin, formatted as page X of Y. Example: page 1 of 2; and
 - IV. top border separating footer from body.
 - iii. The even numbered page footer contains a:
 - I. page number aligned on the left margin formatted as page X of Y;
 - II. document issued or revised date aligned on the right margin. Example: OKDHS issued 10-10-2007 or OKDHS revised 10-10-2007; and
 - III. top border separating footer from body.
 - iv. The odd numbered page footer contains a:
 - I. page number aligned on the right margin formatted as page X of Y;
 - II. document issued or revised date aligned on the left margin. Example: OKDHS issued 10-10-2007 or OKDHS revised 10-10-2007; and
 - III. top border separating footer from body.

- E. Headings
 - i. Master headings identify larger portions of related content and may contain regular headings.
 - ii. Regular headings identify subcontent within master headings.
 - iii. Headings are bold and must follow the style format.
- F. Signature
 - i. If required, the signature line must immediately follow the content the signature is intended to endorse.
 - ii. If more than one entity must sign, a signature line is required for each.
- G. Outlines
 - i. Each level is identified by a lowercase letter, Arabic numeral, uppercase letter, lowercase Roman numeral, uppercase Roman numeral, in that order. Example: a., 1., A., i., I.
 - ii. Each enumerated level is indented one-quarter inch to the right.
 - iii. The text wrap is a hanging indention style.
- H. Form field spacing. If there is a label above a form field, an additional one-quarter line is placed, three points, between label and field.
- I. Vertical bar code. In Doc Gen, the vertical bar code:
 - i. starts one inch below top of page in the right margin;
 - ii. is medium size 3 of 9 bar code font and includes an asterisk (*) at the beginning and end of the bar code; and
 - iii. has one-quarter inch white space on all sides.
- J. Track changes must not be used. When editing a form, use underline for new text and strikethrough for deleted text. All formatting must be removed before being submitted to OPRS.

4. Envelopes

- A. One window. Recipient address window:
 - i. is 2.375 inches from top of closed envelope and 0.875 inches from left edge of closed envelope; and
 - ii. opening is 1.25 inches high by 4.50 inches wide.
- B. Two windows. Return address window:
 - i. is 0.6875 inches from top of closed envelope and 0.6875 inches from left edge of closed envelope; and
 - ii. opening is 1.125 inches high by 3.50 inches wide.

- C. Delivery address window:
 - i. is 2.156 inches from top of closed envelope and 0.6875 inches from left edge of closed envelope; and
 - ii. opening is 1.375 inches high by 4.25 inches wide.

5. **Excel documents.**

- A. contain something in empty cells between filled cells. Example: N/A or --;
- B. define row and column titles, multiple regions within a worksheet, and the print area;
- C. have column headers in one cell;
- D. include hyperlink text descriptive of the content it links to;
- E. left justify the first column and right justify the remaining columns;
- F. bottom justify all cells;
- G. display original data for charts;
- H. do not have logos or bar codes; and
- I. do not have blank rows or columns.

6. **Templates**

- A. Templates distributed inside of OKDHS do not require the state or OKDHS logos. Other logos may reside at the bottom of the page with or without the state or OKDHS logos; and
- B. Templates do not require a bar code.

7. **Metadata**

- A. Title:
 - i. forms is the word "Form" and the form number. Example: Form 21AD083E;
 - ii. appendices is the word "Appendix" and the appendix number. Example: Appendix 21AX001E; and
 - iii. instructions is the word "Form," the form number, and the word "Instructions." Example: Form 21AD083E Instructions.
- B. Subject:
 - i. forms is the form name;
 - ii. appendices is the appendix name; and
 - iii. instructions is the form name and the word instructions. Example: Request for Document Assistance Instructions.

- C. Author: name of the division that is creating the document, and phone number with area code.
- D. Company: Oklahoma Department of Human Services (OKDHS).
- E. Category: The word "forms" for all forms, appendices, and instructions.
- F. Keywords: All documents must include "Oklahoma, human services, state government, department, okdhs, dhs."

Keywords for:

- i. forms must include, old form number, category name(s), and any other pertinent words;
 - ii. appendices must include old appendix number, the word "appendices," category name(s), and any other pertinent words; and
 - iii. instructions must include old form number, the word "instructions," category name(s), and any other pertinent words.
- G. Comments must include, for:
- i. forms, the phrase "View, complete, or print the Oklahoma Department of Human Services (OKDHS) Form," form number, and form name;
 - ii. appendices, the phrase "View or print the Oklahoma Department of Human Services (OKDHS), Appendix," appendix number, and appendix name; and
 - iii. instructions, the phrase "View or print the Oklahoma Department of Human Services (OKDHS), instructions for Form," form number, and form name.

8. **Document numbering.** The document number is assigned by the division or OPRS and consists of a two-digit division code, two-character category code, three digit sequence number, and one-digit indicator.

- A. Division codes. See Appendix 21AX003E (ST003E), OKDHS Document Division Codes.
- B. Category codes. See Appendix 21AX004E (ST004E), OKDHS Document Category Codes.

C. Numbering. Document numbers range from 001 to 999.

D. Indicators:

- E = Default
- B = Tablet
- G = Computer-generated
- M = Merge format
- P = Paper only form, not online
- S = Spanish version

- T = Template
- W = Web browser only form, no paper
- X = Test

9. **Disclaimer.** Documents translated into other languages include a disclaimer on every page.

A. In the appropriate language, the disclaimer must state:

"Translations of any materials into a language other than English are intended solely as a convenience to the non-English reading public. We have attempted to provide an accurate translation of the original material in English, but due to the difficulties of translation, slight differences may exist. The original document in English will be the same document number except for the indicator."

B. The disclaimer statement must be at least Arial 8 point font and is placed below the footer.

10. **Codified appendix.** Guideline applies only to codified Title 340 appendices to comply with APA requirements. All other guidelines remain in effect.

A. The header:

- i. contains the Oklahoma Administrative Code (OAC) number on the left margin and OKLAHOMA DEPARTMENT OF HUMAN SERVICES on the right margin; and
- ii. requires one full line, Arial 12 point font, between title and top margin.

B. The footer contains:

- i. OKDHS and issued or revised date on the left margin; and
- ii. page number on the right margin.

f. **Processing.**

- 1. Documents prepared for download by Friday will not go online prior to the following Thursday.
- 2. There is a 30-day processing time period for all requests unless an emergency can be justified by the division.