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

If you have questions or need clarification about the content in this chapter, please contact:

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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 are defined and clarified.

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 they are responsible for and act as subject matter experts on the content of their chapter. Policy owners must collaborate regularly and frequently with regional, AAA, headquarters staff, Developmental Disabilities Community Services (DDCS), 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 before the transition takes place.

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 policies or program managers' input and exceeds ten business days, policy owners need to communicate this delay and the expected date of resolution to the requesting party. Policy owners also are required to collaborate on developing or updating 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?

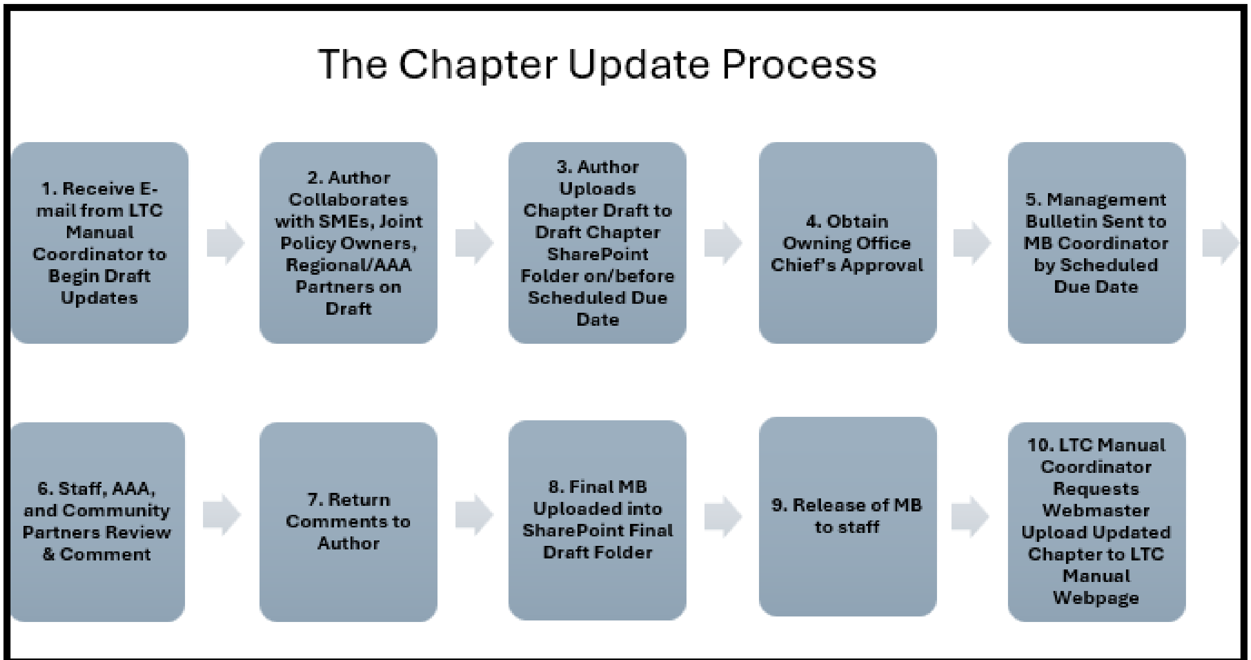
The LTC manual coordinator manages the updates and posting of the LTC Manual. In this role, the LTC manual coordinator will create and set the triannual dates for updating chapters or establishing management bulletins to update chapters. This schedule will be sent to the chapter owners on an annual basis.

Schedule A draft of this schedule is as follows:

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 MC 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 MBs
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	15-Oct	Third week of November	Mid-November	Third week of November

***December to March is dedicated to the Legislative Session**

What is the Process for Coordinators and Policy Owners When Completing Chapter Updates?



- LTC Manual policy owners will provide the LTC manual coordinator with a draft version of the chapter with any noted updates. Key changes or updates to be used in the management bulletin should be provided in bullet points.

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

  - It is crucial that policy owners adhere strictly to the schedule/timelines provided for draft submissions.
  - 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 located in the LTC Manual SharePoint. See *SharePoint Processes* for more information.
  - These revised chapters should have advance 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 use the following naming convention: "**Chapter #_short title_date_draft**" (e.g. **Chapter1_LTCPolicyManual_May2025_draft**) to streamline the collaborative policy implementation process.
- On the cutoff date, revised chapters are sent by the LTC manual coordinator to the management bulletin (MB) 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.
- The MB coordinator collects all comments and edits that are suggested in each chapter and provides them back to the LTC manual coordinator.
- The LTC manual coordinator then forwards the submitted comments to the policy owners, which the policy owners can either agree or disagree to.
  - 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 before the program manager, or their designee, places the draft in the *Finalized LTC Manual Chapters* folder on LTC Manual SharePoint. Additionally, they will note all changes made in the updates portion of the *Management Bulletin Initial Draft Guide* and provide this information to the LTC manual coordinator.
    - **If no edits are needed**: The policy owner will finalize the draft and request their program manager, or their designee, 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 use the following naming convention: "**Chapter #_short title_date_final**" (e.g. **Chapter1_LTCPolicyManual_June2025_final**) to streamline the collaborative policy implementation process.
- Once final, the LTC manual coordinator will then verify that the chapter is complete prior to archiving it. The LTC manual coordinator will then notify the webmaster team to post the finalized files on the *LTC Manual website*.
- The LTC manual coordinator will create a management bulletin using the bulleted key policy updates provided by the author via *Management Bulletin Initial Draft Guide* to communicate to staff the finalized updates to chapter(s).

> 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. After reviewing for any necessary edits or corrections, the last review or revision date should be updated under Revision History. Chapters must be updated timely based on clarification requested from staff or when new guidance is received. Chapter owners will respond to any requests for LTC Manual updates or clarification in a timely fashion, confirming receipt of the request within **seven business days** and offering a resolution within **ten business days**. Please see "How Regions Can Request A Policy Update or Clarification for more information.

Chapter owners are responsible for ensuring their chapter matches the formatting outlined in the *Chapter Template and Style Guide 2025*.

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

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.

The chapter owner is responsible for learning and understanding any programs or policies impacted by their chapter/policy. When policy changes affect other chapters, the chapter owner will 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 is the difference between policy owners and chapter owners?
A chapter owner is 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. Example: Chapter 9a has chapter owners, but within that chapter, guardianship policy is referenced. Chapter 9a's owner would need to include the guardianship policy owner during each revision/update cycle.

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, chapter owners take the time to determine the potential impacts of these changes and vet their 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.

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*.

Please also follow the below guidelines to ensure policy can be implemented 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), 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).
- Direct readers to other chapters if you are referencing that chapter. Try to avoid replicating 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. Run accessibility checks and make sure that all alt text accurately describes images. (Auto generated text is often vague and unhelpful.)
- If you need to add a document in your chapter, save the file to the appropriate folder in the *LTC Manual SharePoint site's* *LTC Manual Attachments* Library. Here, you will find a library designated for any documents that need to be included in the LTC Manual. In the past, these documents were embedded directly into Word documents. However, during the LTC Manual streamlining process, the team discovered that utilizing hyperlinks in lieu of embedding documents sidesteps a myriad of issues with both accessibility for staff and in consolidating the LTC Manual into a searchable document. Using this method to attach links will also allow you to make any necessary corrections to the document without having to update the chapter or have the webmaster team re-post it.

HOW TO CREATE A NEW CHAPTER

When a need to create a new chapter has been identified, the policy owner should consult with their supervisor or office chief prior to drafting that chapter. During the chapter creation process, 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 implementing any processes. Once the draft is completed, it should be vetted with each of the office chief's teams and the W4A, with a point person for each team to collect and share any feedback. When comments and corrections are returned, the author should carefully work through this information looking for themes and how/if comments will be accepted. A response on what is and is not accepted should be provided to the point person(s) that the comments were received from.

Once all edits have been completed, the author can reference the *What is the Process for Coordinators and Policy Owners When Completing Chapter Updates?* section for next steps. The draft of any new chapter would be the equivalent of the "draft updates" referenced in the flow chart and directions.

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 it has been decided 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 goes through the review and approval process. Much like the process to create a chapter, the request to dissolve a chapter should first be submitted to the requestor's office chief for review. 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 the request is necessary, they would then submit this request to the division director to review and approve. If approved, notify the LTC manual coordinator of the dissolution of the chapter. At this point, the change should be communicated 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 covers a broad range of features. Examples include making documents accessible to screen readers, font sizes, color contrast, and using plain language. Digital accessibility gives all staff equal access to the information they need to do their job

DSHS has created guides on making Word or Portable Document format (PDF) documents accessible. These can be found by clicking the following hyperlink: *Accessibility Resources and Training*.

A good first step is to use Word's built in accessibility checker. 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 help move MBs through the review and approval process. The management bulletin process is explained in greater detail in the *How and When to Write a Management Bulletin (MB)* section. It is the management bulletin coordinator that works behind the scenes to ensure that the all MBs have gone through the proper workflow and have the necessary approvals and signatures before they are released. It is important for policy owners to draft MBs in response to requests or following 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 used as a short-term (1-year or less) update with the goal of adding 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 more information on drafting MBs, see the *Management Bulletin Writing Instructions*. They can be found on the *HCS/AAA Intranet site > Management Bulletins > Tutorials > MB Writing Instructions*. These instructions provide guidance on designing and creating management bulletins.

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, also known as 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, not the greater policy.

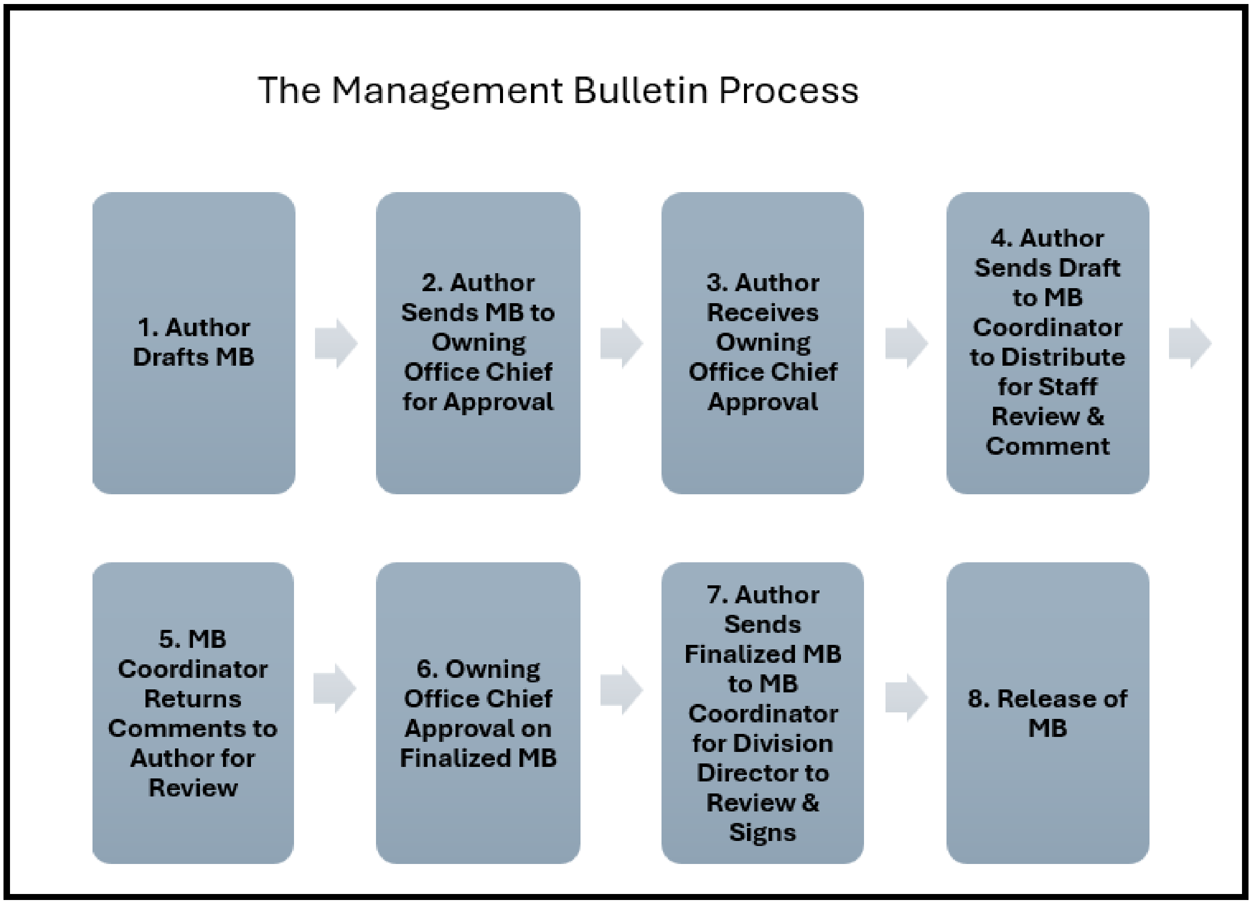
If the identified content is good information to share, but ultimately won't affect policy or procedure, a Management Bulletin would NOT be warranted. In this scenario, it is best practice to wait for the next chapter update to integrate this information into chapter.

What Review Process is Needed for Management Bulletins?

Once a management bulletin is in place, timely reviews by the author of the MB are needed. The author should examine if the information in the management bulletin is a temporary or permanent update to policy and 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 with a message 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. 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, there are eight steps to go from drafting 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), DDCS, AAA partners, program managers and/or other policy owners.

2. When the MB draft 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 comment.

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. They will forward the MB to the HCS director or their designee for review:
    - If 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.

- 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?

Policy owners 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 the additional information will be a new chapter or subchapter, or if the MB will be added to an existing chapter or subchapter.

When transitioning an MB to a new section of a chapter, any HCS staff that collaborated to develop should be notified. This will allow them to make any updates needed on their chapters as well.

> Chapter owners are not supposed to request off-cycle updates to their chapter unless it is either emergent or immediately effects how case managers perform their jobs.

Once the MB has been incorporated into the chapter, the MB should then be rescinded by following the MB rescind process. Chapter owners should also 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 should not offer 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.

How to Rescind a Management Bulletin

Rescinding (also referred to as "sunsetting") a management bulletin is a simple process. Utilizing the same *MB Initial Draft Guide Form* that the MB was initially submitted with, simply check the "Rescinded" Box at the top of the first page.

Management Bulletin (MB) **Initial Draft Guide**

☐ New	Present original content
☐ Amended	Update an existing MB using the same MB number
☐ Superseded	Replace an older MB of similar content; a new number is issued
☐ Rescinded	Pull from MB site due to information that is no longer relevant

MB TYPE

Also, on the bottom of this same page, enter the date that the MB rescission is to be effective.

	Target date for MB release:	Click here to enter a date.
If there is no rescind date, leave blank.	Rescind date:	Click here to enter a date.
If there is no sunset review, leave blank. *Default date is one year from MB release date.* *At sunset review, MB authors will be asked to review and determine if MB should remain or be amended, superseded, or rescinded.*	Sunset review date:	Click here to enter a date.

Once fully completed, send the form to the MB coordinator for processing along with any additional information or attachments needed. It is important to rescind MBs that are out of date to ensure consistent policy information is provided.

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 DDCS, 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.
- If the MB is accompanied by an updated chapter, ensure that the Webmaster team has posted the newest version of the chapter at the same time that the MB is released. Policy owners can check for the newest version on the *LTC Manual webpage*. The MB or LTC manual coordinators can assist in communicating with the webmaster team, if needed.

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 implementing policy arises, and the *LTC Manual* is not able to 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 a 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 adapting 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 there is a contact for discrepancies, and the most up-to-date version is being used.

5. Additionally, printed versions of the *LTC Manual* are not recommended, as accessing digital formats ensure 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:

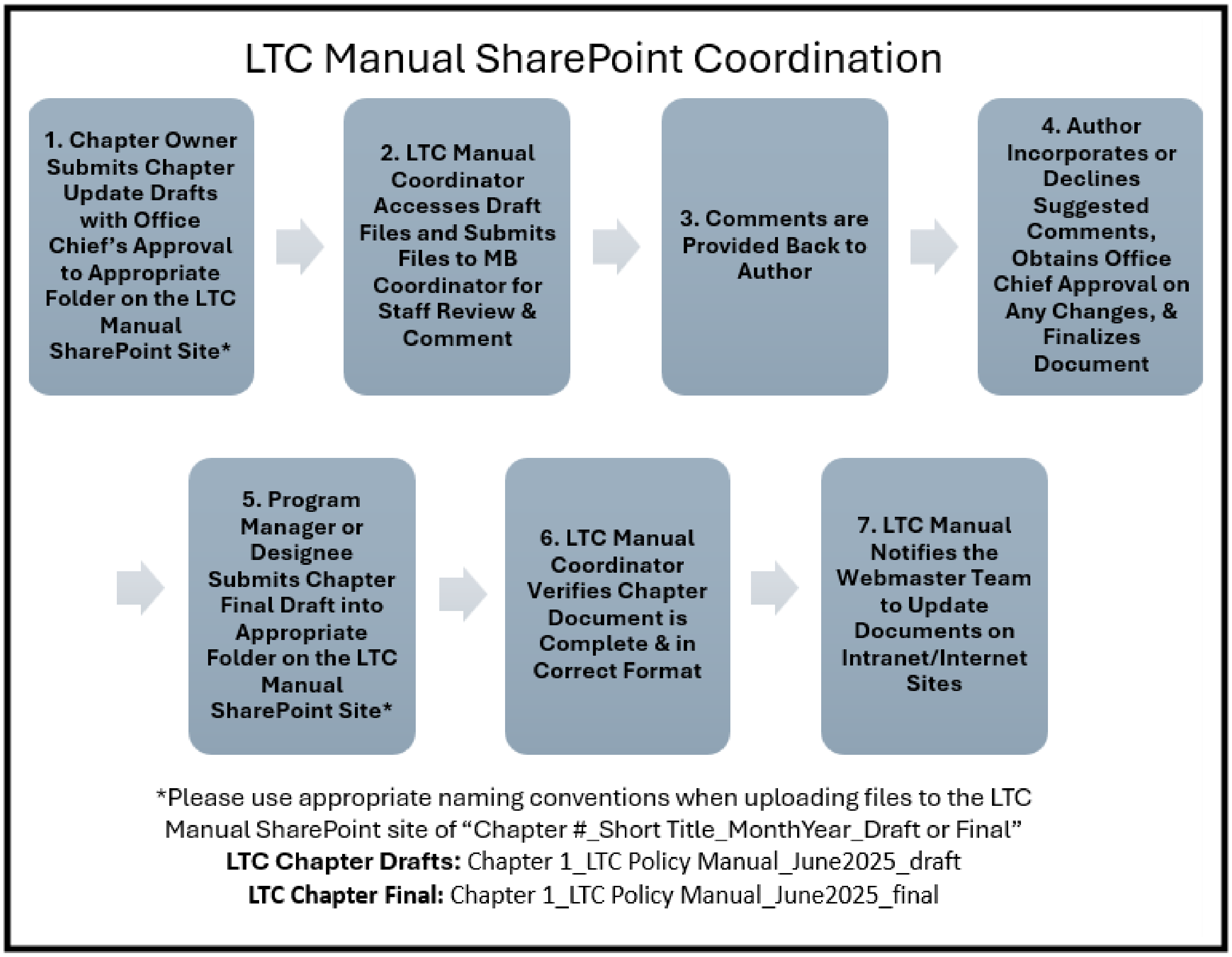
- Access to the most recent PDF of the compiled, searchable LTC Manual and link to the LTC Manual website.
- Shared space to maintain draft versions of LTC Manual updates for the LTC manual coordinator to quickly access.
- Shared space for finalized chapter updates to be held, entitled, *Finalized LTC 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 flowchart for LTC Manual chapter updates on the SharePoint site is as follows:



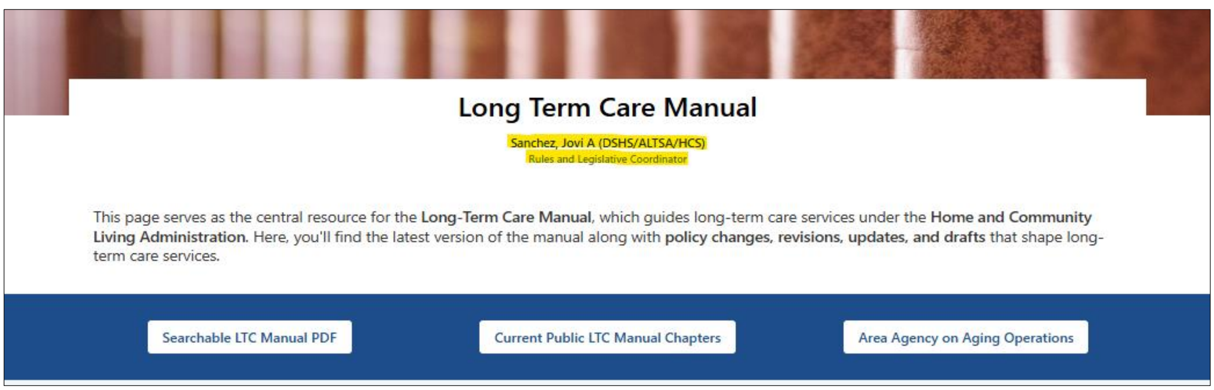
Who Can Access the Various Tools on the LTC Manual SharePoint Site?

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. Please note that each region may have additional people with access to the policy clarification or updates page. Contact your region's Social Services Training & QA Program Manager, if you have questions related to access for your region. 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**

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?

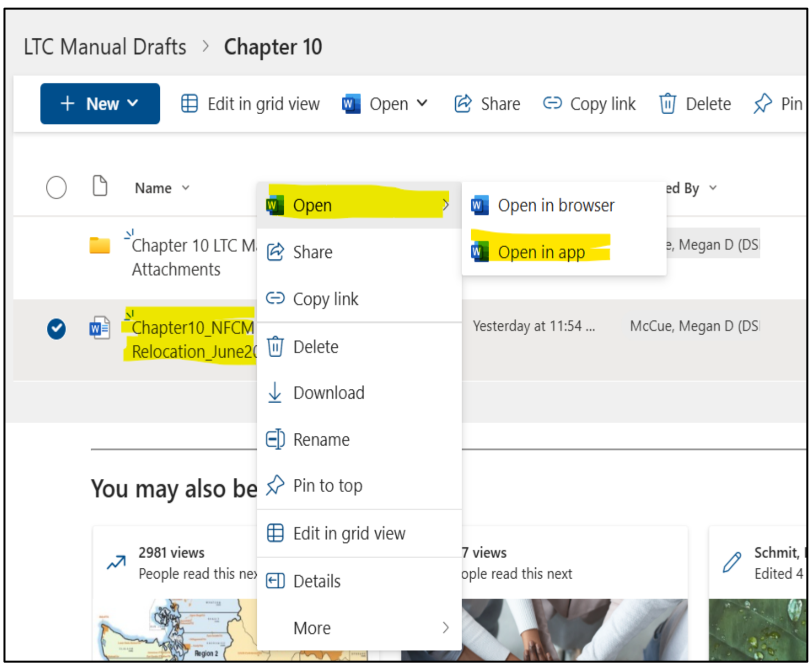
The most recent files for each chapter will be found in the "LTC Manual Drafts" folder on the SharePoint site.

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. ALL comments have been integrated,
   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?

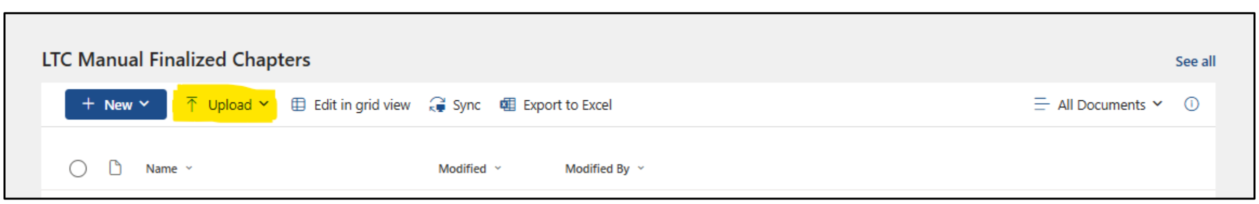
The LTC Manual SharePoint can be accessed easily by clicking the following hyperlink: *Long-Term Care Manual SharePoint site*. Under the banner and main title of the page, you will find a tile entitled *LTC Manual Drafts*. This folder is where policy owners collaborate with co-owners and work on the 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.*

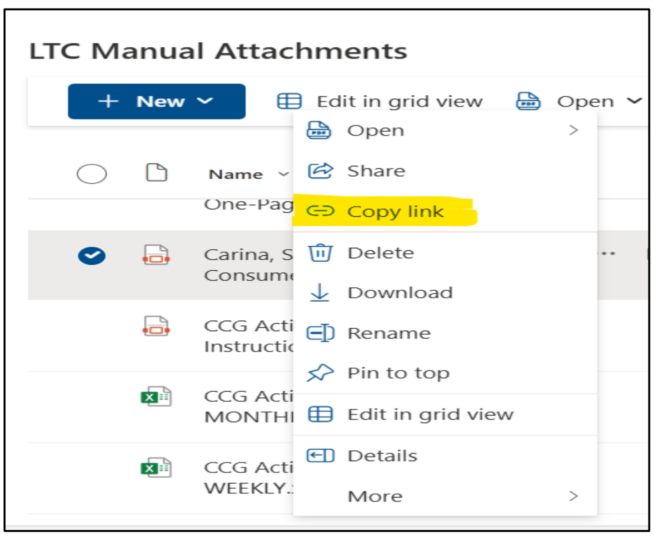
How do Policy Owners Successfully Upload Documents to the LTC Manual Attachments Library and Create Hyperlinks for Documents?

All attachments (and previously embedded documents) can be found in the *LTC Manual Attachments Library* on SharePoint. Maintaining these documents in this SharePoint site, which is connected to the HCS SharePoint HUB, allows for improved access for staff and improved editing rights for policy owners. If edits are needed on one of the documents, please follow the following steps:
The most recent files for each chapter will be found in the *LTC Manual Drafts* folder on the SharePoint site.

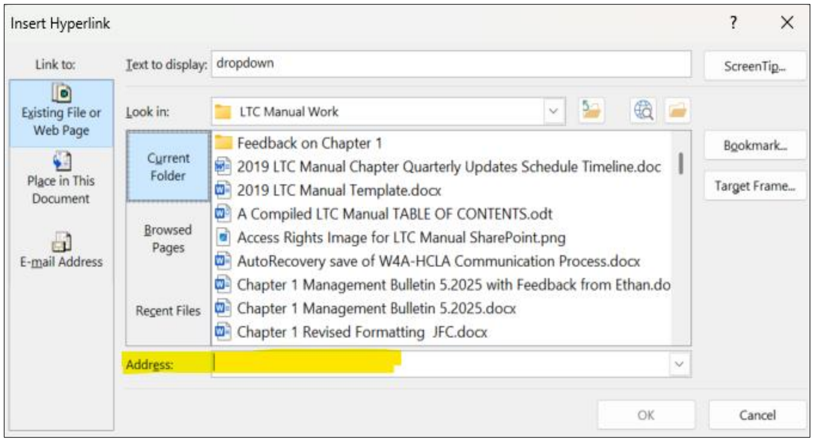
1. To access the current attachments for chapters in the LTC Manual SharePoint site, please click on the following link: *LTC Manual Attachments Library*. If the attachments has not been uploaded to the library, simply hit the upload button on the library, locate the file you would like to upload and click on it.

2. Locate the document in the *LTC Manual Attachments Library* that you want to create a hyperlink for and right click on it.

3. Click "Copy Link" from the drop-down menu (see below).



4. You will then need to go to the location in your Word document that you would like to create the hyperlink in and highlight the word(s) that you'd like to use to hold the hyperlink. Right click on the highlighted words and click "Link" from the dropdown menu.
5. Paste the link that you copied into the "Address" bar (see below).



6. Click ok. Then your hyperlink will be in place!

<u>Why are we being asked to hyperlink to documents from the HCS HUB?</u>

- Embedded documents cannot be modified or edited outside of the triannual update cycle. Documents that are hyperlinked from the *HCS HUB* can be edited at any time (so long as the name and file location aren't altered) with the edits becoming evident immediately. This reduces redundant work for the LTC manual coordinator and the web services team.
- Using hyperlinks streamlines the creation of the single, searchable PDF file of the LTC Manual, as embedded documents do not work after the PDF conversion.
- Hyperlinks eliminate bulk from the LTC Manual.
- Archiving a document (which involves moving it from its original location into the "Archived LTC Manual Attachments" folder within the *LTC Manual Attachments Library*) will immediately stop access to the document wherever it has been hyperlinked. This offers a quick way to retract documents from online circulation.
- Using hyperlinks that originate from the *HCS HUB* eliminates access concerns, thus ensuring that all staff can easily access the needed document. The *HCS HUB* is HCS's main SharePoint site, from which all HQs sites are connected.
- Other policy owners can easily link to a document owned by another policy owner by locating it in the *LTC Manual Attachments Library*.

How do Policy Owners Edit Attachments in or Remove Attachments from the LTC Manual Attachments Library?

To edit a document in the LTC Manual Attachment Library, please follow the below steps:

1. Access the current attachments for chapters in the LTC Manual SharePoint site by clicking on the following link: *LTC Manual Attachments Library.*

2. Scroll down to find the document that you want to edit. Right-click on the file name of your file, hover over or left-click "Open," then hover over and left-click "Open in app". This will allow the autosave function to be on and will capture the edits that you make

to your file. Do not open the document in the browser as this can cause formatting issues.

3. Please contact the LTC manual coordinator directly if you need to remove an attachment from the *LTC Manual Attachments Library*. The LTC manual coordinator will move the document from the *LTC Manual Attachments Library* into the Archived *LTC Manual Documents subfolder*. The archived document will remain in this subfolder, should you need to reference it in the future.

> If edits are needed on one of the attachments referenced in your chapter, please DO NOT rename the document or alter the file's location, as this will break all hyperlinks created for the document. Simply open the attachment, make the necessary edits and save the changes.

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:

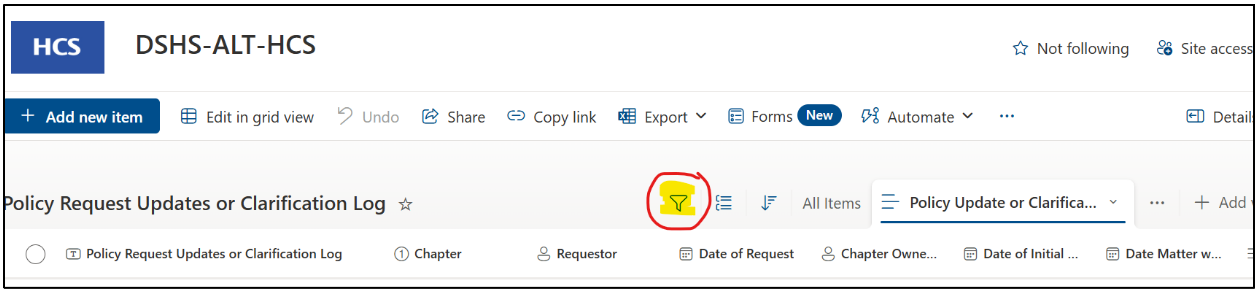
1. Date of initial response by chapter owner
2. Chapter owner response
3. Additional comments from chapter owner to explain if the request was either accepted, partially accepted, or declined and provide a why.
4. Date matter was addressed by owner
    a. This is the date that the matter was fully resolved.
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
DDCS	Developmental Disabilities Community Services
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 #
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