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ADS Chapter 501

The Automated Directives System (ADS)

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Functional Series 500 – Management Services
 ADS 501 – The Automated Directives System (ADS)
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ADS 501 – The Automated Directives System (ADS)

501.1 OVERVIEW

Effective Date: 05/26/2017

Every Federal agency is required to make and preserve records of its policies and procedures and to adequately document the information through effective directives management (44 USC, Section 3101 and 36 CFR Section 1222). The Automated Directives System (ADS) is USAID's directives program. The ADS contains the organization and functions of USAID, along with the policies and essential procedures that guide the Agency's programs and operations. It is intended to provide the information that employees need to carry out their responsibilities and to achieve Agency goals, consistent with applicable laws, regulations, and policy decisions. This chapter provides the policies and procedures for the development and maintenance of material contained in the ADS.

The ADS does not establish requirements for USAID contractors and grantees. In accordance with the Administrative Procedures Act (APA, 5 U.S.C. Subchapter II, at <http://www.archives.gov/federal-register/laws/administrative-procedure/>) it may be necessary to engage in rulemaking when the Agency is considering a regulation that will affect the rights and interests of outside parties (see [ADS 156, Agency Rulemaking](#)).

501.2 PRIMARY RESPONSIBILITIES

Effective Date: 05/26/2017

The following Bureaus/Independent Offices (B/IOs) have primary responsibility for specific policy directives and required procedures within this chapter:

a. The Bureau for Management, Office of Management Policy, Budget and Performance (M/MPBP) Directives Management Staff:

1. Provides oversight and guidance for the development and dissemination of Agency policies and procedures,
2. Administers the ADS and the Agency's Notices system, and
3. Administers the ADS MyUSAID page and public ADS Web site.

b. ADS Points of Contact (POC) work with M/MPBP to create and maintain ADS material within their notional areas of responsibility.

c. ADS Clearing Officials review new and substantively revised ADS material and provide comments and clearance on behalf of their Bureau/Independent Office (B/IO).

d. USAID employees are responsible for complying with the policy directives and required procedures identified in the ADS.

501.3 POLICY DIRECTIVES AND REQUIRED PROCEDURES

501.3.1 Structure and Content of the ADS

Effective Date: 05/26/2017

The ADS is a real-time directives system. The ADS is organized into the following six functional series that cover Agency programming and management operations:

Series 100: Agency Organization and Legal Affairs

Series 200: Programming

Series 300: Acquisition and Assistance

Series 400: Human Resources

Series 500: Management Services

Series 600: Budget and Finance

Each functional series contains chapters organized by subject matter. Each functional series also contains ADS internal mandatory references and ADS additional help references. These chapters and references are continuously updated to align USAID's policies with the latest federal regulations and other overarching guidance.

- 1. ADS Chapters.** Each ADS chapter includes mandatory policy directives and required procedures as well as explanatory information on specific topics. The ADS chapter standardized structure contains six mandatory sections: Overview, Primary Responsibilities, Policy Directives and Required Procedures, Mandatory References, Additional Help, and Definitions (see [ADS 501saq, ADS Chapter Template](#) for more details on these sections). ADS chapters should not contain footnotes or extensive graphs or tables. ADS chapters should be no longer than 50 pages, with 100 pages being the maximum.
- 2. ADS Internal Mandatory References.** These references carry the same weight as ADS chapters. If an ADS document contains mandatory guidance but does not have enough content to meet the standardized structure of an ADS chapter, then it should be an internal mandatory reference. ADS internal mandatory references do not have a standardized structure and they have no page limit.
- 3. ADS Additional Help References.** These references contain non-mandatory guidance. ADS additional help references do not have a standardized structure and they have no page limit (see **501.6** for more information).

The ADS does not contain internal office procedures.

501.3.1.1 Mandatory and Non-Mandatory Guidance in the ADS

Effective Date: 05/26/2017

The ADS contains both mandatory policy and non-mandatory guidance. The **mandatory policy** encompasses two broad categories (1) policies that the Agency has

identified as necessary for the proper conduct of its business and (2) required procedures which identify more detailed courses of action that must be followed. Every employee must comply with mandatory guidance.

Mandatory guidance in the ADS is kept to a minimum, preserving operational flexibility to the extent consistent with law and regulation, sound policy principles, and management practices. **Non-mandatory** guidance is intended to help employees carry out their duties. While strongly encouraged to review and consider such guidance, employees are not required to follow it.

501.3.2 Creating and Revising ADS Material

Effective Date: 05/26/2017

Management officials must designate qualified ADS Points of Contact (POCs) in their B/IO to create and revise ADS material in consultation with M/MPBP. A qualified POC is a subject matter expert (SME) or someone who can interview the SME and write the ADS material.

In accordance with the [Plain Writing Act of 2010](#), USAID's policies must be simple and easy to understand, with the goal of minimizing the potential for uncertainty and litigation arising from such uncertainty.

The POCs writing ADS material must communicate clearly to Agency employees using plain language. The goal is for employees to find what they need on the subject, understand what they find, and use what they find to meet their needs. When writing, POCs must:

- a. Follow the [ADS Style Guide](#);
- b. Know and understand the requirements, applicable laws, regulations and policy decisions impacting the subject matter (The weekly [Policy Alert](#) provides a synopsis of new and revised external policies);
- c. Know the extent of their authority;
- d. Ensure that material is well organized and that content is comprehensive;
- e. Use active rather than passive voice; and
- f. Be concise.

Before revising ADS material, POCs must request the most current version of the ADS chapter or reference from M/MPBP's ADS Team. This ensures that POCs are revising the correct version of ADS materials, limiting version control issues among reviewers. POCs must send new or revised material to the ADS Team at ads@usaid.gov for review and editing before it is released for Agency-wide clearance. Before submitting new or revised ADS material, the POC must ensure that the material is a final draft. This

means that the POC must obtain all internal clearances in their B/IO and conduct any necessary pre-vetting before submitting the material to the ADS Team. Once the POC submits the ADS material to the ADS Team for review, they cannot make additions or changes to the material. Due to the magnitude of chapters and references in the ADS, the ADS Team cannot review/edit preliminary revisions of ADS chapters and references.

Once the POC submits a final version of ADS material for review, an editor will be assigned to review the material for plain language, content, grammar, format, and other considerations. Simultaneously, an M/MPBP Policy Analyst will be assigned to review the ADS material from a more holistic approach. The editor will combine their notes with the notes from the analyst into one document and will send that document back to the POC for a final review within 10 business days. If there are several ADS documents in queue for review then the editorial process may take up to 20 business days.

501.3.2.1 Consultation on ADS Material

Effective Date: 05/26/2017

POCs are encouraged to consult with staff in the B/IOs that may be affected by the new or revised ADS material before the clearance process. This potentially eliminates an overwhelming number of comments in the clearance process. If a POC decides to do the consultation, they should highlight the material that is new and give the reviewing B/IO a deadline for giving feedback. This deadline should be no more than five business days. If the reviewing B/IO does not give feedback by the deadline, the POC should move forward and submit the ADS material to the ADS Team for editing.

501.3.3 The ADS Clearance Process

Effective Date: 05/26/2017

Agency clearance must be requested for all new or substantively revised ADS material unless the material meets the exception criteria outlined in **501.3.3.8**. ADS material includes chapters and references. ADS Clearing Officials review ADS material for compliance/conformity with policies and practices that have broad applicability within the Agency or specific applicability to a functional responsibility of their B/IO. The ADS clearance process takes approximately 45 business days (see [ADS 501saj, The ADS Process](#)).

501.3.3.1 Designation of Clearing Officials

Effective Date: 05/26/2017

Each B/IO must designate one ADS Clearing Official to provide clearance on behalf of their B/IO for ADS material. During the ADS clearance period, the ADS Team will only accept comments from the authorized ADS Clearing Official (see [ADS 501mab, Clearance List for ADS Material](#)), unless the official designates, in writing, a different individual to provide comments/clearance on his or her behalf. When the authorized ADS Clearing Official is away from the office for three or more days, an alternate

Clearing Official must be designated to provide comments on behalf of the B/IO. The ADS Clearing Official must send the designation to ads@usaid.gov.

Please note that authorized Clearing Officials may only designate **one** person to review ADS material and clear on their behalf. This eliminates conflicting views between multiple reviewers.

501.3.3.2 Request for Clearance

Effective Date: 05/26/2017

The ADS Team emails clearance requests from the ADS Mailbox (ads@usaid.gov), to the ADS Clearing Officials listed in [ADS 501mab, Clearance List for ADS Material](#). The ADS Clearing Officials have the following four options:

- Advise that they clear the material;
- Advise that they do not clear until their **substantive** comments are resolved (they must include their comments in track changes in the ADS material and clearly indicate that they are substantive);
- Advise that they clear the material and are including **non-substantive** comments or suggestions for the author's consideration;
- Advise that clearance by that B/IO is not required or is not applicable.

For more information on substantive versus a non-substantive comment, please see section **501.3.3.4**.

If an ADS chapter has been partially revised, ADS Clearing Officials can only comment on the revised language. In the case of a partial revision, if an ADS Clearing Official provides comments on text that was not revised, it is at the discretion of the POC to address/incorporate those comments or note them for a future revision.

501.3.3.3 Timeframe for Clearance Responses

Effective Date: 05/26/2017

ADS Clearing Officials have 10 business days to respond to ADS clearance requests. Responses must be provided in full within the 10 day period. If an ADS Clearing Official or designated alternate does not respond within the comment deadline, their B/IO forfeits its right to comment on the material.

ADS Clearing Officials may request additional time, no longer than five business days, to review ADS material. It is at the discretion of M/MPBP to grant extensions. M/MPBP will not accept comments after the deadline period unless an extension was approved.

501.3.3.4 Substantive and Non-Substantive Comments

Effective Date: 05/26/2017

ADS Clearing Officials review ADS material for Agency compliance/conformity with policies and practices that have broad impact on the entire Agency or specific applicability to a functional responsibility of their B/IO. ADS Clearing Officials are encouraged to use track changes to submit their comments.

Substantive comments alter the **meaning or intent** of the document. If an ADS Clearing Official requests a change to what people are required to do or how they are required to do it or points out conflicting information or inconsistencies, it is a substantive comment. The following are examples of what would be considered a substantive comment:

- Changing the tasks in a procedure or changing the responsible party,
- When a policy conflicts with a current policy or inaccurately reflects a current practice, or
- When a policy might have an adverse effect on budget, staffing, or customers.

Non-Substantive comments are editorial or provide clarification for already existing policy. If an ADS Clearing Official requests a change in the way information is presented, rather than the content, it is a non-substantive comment. One example would be suggesting a rewording for clarity.

The ADS Team, in coordination with the POCs, must address or incorporate all substantive comments before moving forward with issuance. POCs can choose whether to adopt non-substantive comments. If questionable, the ADS Team will determine whether a comment is substantive or non-substantive.

501.3.3.5 Re-Clearance

Effective Date: 05/26/2017

ADS chapters or references that are substantively revised as a result of clearance comments must be re-circulated to the ADS Clearing Officials, along with an explanation or notation of the changes unless the change meets one of the exceptions outlined in **501.3.3.8**. The ADS Team will provide up to five business days for the ADS Clearing Officials to respond to the revised material. The timeframe for reclearance may be shorter if circumstances warrant greater urgency. ADS Clearing Officials must only provide comments on the material that has changed. ADS Clearing Officials cannot use the re-clearance period to comment on the entire document or on material that has not changed since the original clearance request.

501.3.3.6 Resolving Differences During the Clearance Process

Effective Date: 05/26/2017

The M/MPBP ADS Team facilitates the Agency-wide clearance process and all clearance correspondence between the POCs and the ADS Clearing Officials. The

ADS Team must send a master version of the ADS material containing all clearance comments to the POC within three business days after the clearance deadline has ended. The POC must make every effort to resolve all substantive issues that arise during the ADS comment period within ten business days after comments are received. M/MPBP/POL will not proceed to publication without resolution of all substantive clearance comments.

If the ADS Team, in coordination with the POC and the ADS Clearing Official, are unable to reach resolution, they must immediately elevate the issues within the B/IOs to the level necessary to reach resolution. If resolution is not reached within the operating units, M/MPBP will serve as a mediator in resolving the issue. If necessary, the issue will be elevated to the Director of M/MPBP. If not resolved at this level, the issue will be elevated to the Assistant Administrator for Management (AA/M) which could include consultation with the Administrator's office for a final decision.

501.3.3.7 Documentation

Effective Date: 05/26/2017

The ADS Team must maintain documentation (email or memo) from all parties to demonstrate that final resolution of comments occurred.

501.3.3.8 Exceptions to the ADS Clearance Process

Effective Date: 05/26/2017

Exceptions to the ADS clearance process relate to the incorporation of policy through different types of conforming amendments. The conforming amendment process involves submission of ADS material that is changed to conform to existing ADS policy, Administrator decisions, or new/revised federal mandates. Agency clearance, by designated ADS Clearing Officials, is not required for ADS material that meets the criteria of a conforming amendment. Conforming amendment exceptions include:

1. Written policy issued by the Administrator or Deputy Administrator,
2. Policy that incorporates new or revised external regulations (this must be word for word and not a policy on how USAID will implement the regulation),
3. Policy that complies with policy already contained in other ADS chapters or internal mandatory references, and
4. ADS material that is subjected to high level Agency review.

ADS material that is subjected to high level Agency review or undergo a more limited clearance process due to the nature of the material, including:

- ADS 101, Agency Programs and Functions;
- ADS 103, Delegations of Authority;

- Changes to Bureau/Independent Office symbols or acronyms;
- Acquisition and Assistance Policy Directives (AAPDs) that provide interim policy and procedures of an urgent and compelling nature;
- Human Capital and Talent Management (HCTM) ADS material (which includes clearance from GC, the Unions, and M/MPBP); and
- ADS Chapters 501 and 504 and their accompanying references.

If a B/IO proposes ADS material as a conforming amendment and the ADS Team, in consultation with an M/MPBP Policy Analyst, determines that it does not meet the criteria, the ADS material can be submitted for consideration by the AA/M to make a determination. If necessary, further appeal can be made to the Administrator.

After approval of the conforming amendment, the policy will be inserted into the appropriate ADS chapter(s) and will be issued via the ADS Web site and by Agency Notice.

501.3.4 Issuance of ADS Material

Effective Date: 05/26/2017

The ADS Team prepares the final package for issuance once ADS material has received full Agency clearance. The following steps occur in preparing ADS material for issuance:

- a. The ADS Team reviews the final chapter or reference for ADS style, format, punctuation, and grammar, and ensures that all hyperlinks are accurate and functional.
- b. The ADS Team, in conjunction with the ADS POC, prepares the Policy Notice.
- c. M senior management reviews and approves final ADS material for issuance.
- d. The ADS Team sends out the Policy Notice and posts the new or revised ADS material on the ADS public Web site.

Additional help documents do not require Agency clearance, but POCs must send them to the ADS Team for review before issuance.

501.3.5 Maintaining ADS Material

Effective Date: 05/26/2017

POCs responsible for ADS material must regularly review their ADS chapters and references and modify the material where required to ensure that it is current and

consistent with laws and regulations, and management practices. This includes determining when material is no longer relevant or necessary and can be archived.

In order to archive ADS material, the POC of the ADS material must gain approval from all major stakeholders and send those approvals along with an explanation (such as is the policy obsolete, is the policy codified somewhere else in the ADS, or would archiving this chapter affect any other ADS chapters) as to why the material should be archived to the ADS Team at ads@usaid.gov. The ADS Team will determine if the policy should be archived and if necessary recommend to M senior management that the policy be removed from the ADS. If an ADS chapter or reference is archived, the ADS Team will send out an Agency Notice announcing the archived material.

For copies of archived ADS material, please contact ads@usaid.gov.

501.3.6 Annual ADS Certification and Workplan

Effective Date: 05/26/2017

In order to certify ADS material on an annual basis, M/MPBP has created an ADS Work Plan for each B/IO responsible for ADS material. These ADS Work Plans ensure that ADS material remains current. The ADS Work Plans include all of the chapters that the B/IO is responsible for along with their current status and timelines for revisions, if necessary. M/MPBP conducts meetings on an annual basis, starting in October, with each B/IO to review their ADS Work Plan to ensure that the ADS stays current.

501.3.7 ADS Web sites

Effective Date: 05/26/2017

The ADS Team maintains and updates both the ADS public Web site and the ADS MyUSAID page.

The ADS public Web site is the official repository for ADS material. B/IOs must not post draft ADS material to other Web sites without contacting M/MPBP for approval. Only PDF versions of ADS material are housed on the public Web site. For copies of Word versions of ADS chapters and references, please email ads@usaid.gov.

The ADS MyUSAID page contains additional ADS resources to keep Agency employees engaged in the ADS.

501.4 MANDATORY REFERENCES

501.4.1 External Mandatory References

Effective Date: 05/26/2017

- a. [**36 CFR 1194, Electronic and Information Technology Accessibility Standards**](#)

- b. [36 CFR 1222, Directives documenting agency programs, policies, and procedures](#)
- c. [44 USC, sec 3101, Records Management by Agency Heads](#)

501.4.2 Internal Mandatory References

Effective Date: 05/26/2017

- a. [ADS 501maa, ADS Chapters and Points of Contact List](#)
- b. [ADS 501mab, Clearance List for ADS Material](#)
- c. [ADS 501mac, ADS Style Guide](#)
- d. [ADS 501mad, USAID-Federal Regulations for Web Accessibility](#)
- e. [ADS 504, Agency Notices](#)

501.5 ADDITIONAL HELP

Effective Date: 05/26/2017

- a. [ADS 501saq, ADS Chapter Template](#)
- b. [ADS 501sah, Standard Operating Procedures in the ADS](#)
- c. [ADS 501saj, The ADS Process](#)

501.6 DEFINITIONS

Effective Date: 05/26/2017

See the [ADS Glossary](#) for all ADS terms and definitions.

additional help

An additional help document provides non-mandatory guidance intended to clarify Agency policy and its application contained in the Automated Directives System (ADS). For example, these may include "how-to" guidelines and non-mandatory reference material created internally or externally. These documents may repeat policy, but do not contain new policy. Additional help documents are optional reading. **(Chapter 501)**

ADS Clearing Official

An ADS Clearing Official is a designated person in a specific Bureau/Independent Office obligated to review and clear on Automated Directives System (ADS) material. **(Chapter 501)**

authority

An Authority is the legally binding instrument that authorizes or contains the policy directives and required procedures issued as USAID direction. These instruments

include: laws, regulations, Executive Orders, court decisions, and rulings by Federal Authorities. "Authority" refers to the legal ability or power to give commands, enforce compliance, or make decisions. (**Chapter 501**)

Automated Directives System (ADS)

The ADS is USAID's directives program. It contains (1) USAID internal policy directives and required procedures; (2) external regulations applicable to USAID; and (3) non-mandatory guidance to help employees interpret and properly apply internal and external mandatory guidance. (**Chapter 501**)

conforming amendment

Policy that does not require ADS Agency clearance because it meets one of the following criteria:

1. Written policy issued by the Administrator or Deputy Administrator,
2. Policy that incorporates new or revised external regulations (this must be word for word and not a policy on how USAID will implement the regulation),
3. Policy that complies with policy already contained in other ADS chapters or internal mandatory references, and
4. ADS material that is subjected to high level Agency review.

directive

A written instruction communicating policy directives and/or required procedures. These instructions may be in the form of the following: orders, regulations, bulletins, circulars, handbooks, manuals, notices, numbered memoranda, and similar issuances. (**Chapter 501**)

directives management program

The directives management program provides Agency personnel with the means to document and convey Agency policy directives and required procedures to users through written instructions. (**Chapter 501**)

editorial changes

Editorial changes are simple clarifications that **do not** alter the substantive meaning of the Automated Directives System (ADS) material. Editorial changes include: punctuation changes, grammar corrections, reordering existing material and adding headers for ease of use, updates to Bureau/Independent Office symbols, address and name changes, and hyperlink additions. (**Chapter 501**)

effective dates

Effective dates are inserted when specific policy directives or required procedures within an Automated Directives System (ADS) chapter or internally created reference become

effective. Effective dates only change when substantive modifications are made within the document. (**Chapter 501**)

guidance

Guidance is a general term that includes: policy directives and required procedures, rules, regulations, advice, and other information relevant to the conduct of USAID business. The critical distinction is between mandatory and non-mandatory guidance, as defined below. A particular document may contain both mandatory and non-mandatory guidance.

a. mandatory guidance

Guidance specifying *required* actions and behavior on the part of Agency employees and operating units, signified by phrases like "must," "must not," "is required," or the equivalent. Employees are held accountable for adherence to mandatory guidance, and must comply with it unless an exception is made in accordance with established procedures. Policy directives – mandatory guidance contained in documents prepared according to Automated Directives System (ADS) procedures – are clearly identified as mandatory. A document written before the initiation of the ADS may also contain mandatory guidance that remains in force, in which case it is classified as an internal mandatory reference.

b. non-mandatory guidance

Guidance intended to assist employees in carrying out their duties, but does not specify required actions and behavior. Employees are strongly encouraged to review and consider such guidance. (**Chapter 501**)

plain language

As defined by the Plain Language Action and Information Network (PLAIN), plain language is writing that your reader can understand the first time he or she reads it. It doesn't mean writing for a certain grade level – it means organizing and writing for your reader. Writing in plain language saves time and money for writers and readers. Writing in plain language includes using common, everyday words, short sentences, active voice, and, when appropriate, addressing the reader directly by using the pronoun "you." (**Chapter 501**)

Point of Contact (POC)

The individual designated by a B/IO to be the liaison with M/MPBP/POL on ADS material and to serve as the subject matter expert (SME) and/or author of ADS material. (**Chapter 501**)

policy

USAID policy includes both mandatory guidance (policy directives and required procedures and internal mandatory references), as well as broader official statements of Agency goals, guiding principles, and views on development challenges and best practices in addressing those challenges. (**Chapter 501**)

policy notice

A notice, issued as part of the nightly notices to all USAID employees that includes both mandatory guidance and required procedures, and may include broader official statements of Agency goals, guiding principles, and views on development challenges and best practices in addressing those challenges. **(Chapter 501)**

regulation

An agency statement of general applicability and future effect, that the agency intends to have the force and effect of law, that is designed to implement, interpret, or prescribe law or policy or to describe the procedure or practice requirements of an agency. **(Chapter 501)**

revision date

The date that Automated Directives System (ADS) chapters, internal mandatory references, or additional help documents are finalized for distribution. This is not an effective date. “New Edition” indicates that the chapter is being issued for the first time. “Partial Revision” indicates that some portions of the chapter have been modified. “Full Revision” indicates that the chapter has been revised in its entirety. The type of issuance is indicated on the lower right-hand corner of a chapter’s cover page and in the header of subsequent pages. **(Chapter 501)**

substantive changes

Substantive changes alter the meaning or intent of the policy directive or required procedure. If you change what people are required to do or how they are required to do it, you are making a substantive change. **(Chapter 501)**

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