

Office of Administrative Hearings

Rules Division

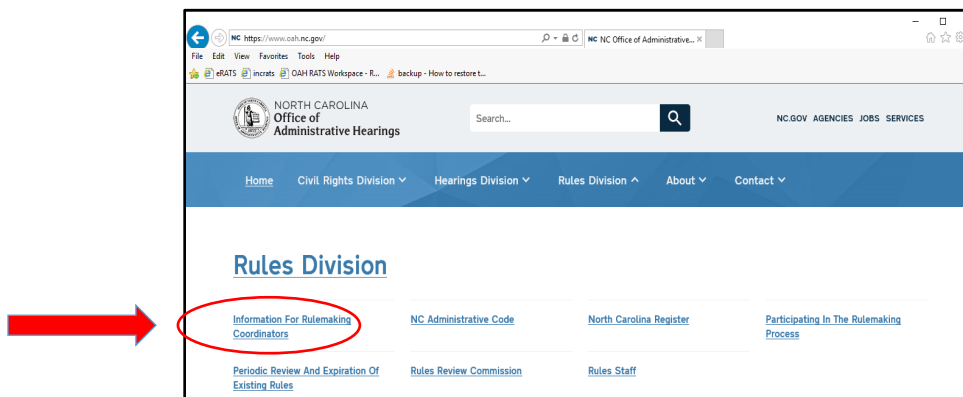
Template Documentation

The Rules Division within the Office of Administrative Hearings has created a Microsoft Word Macro Enabled Template that Rulemaking Coordinators can use to facilitate the Rulemaking process. The OAH Agency Rules Template contains formatting styles and various utilities that will assist the coordinators as they draft and modify rules. The template was developed using Microsoft Word 2016 and should function properly in Microsoft Word 2010 or higher.

The template was developed to assist Rulemaking Coordinators create a document that adheres to the requirements set out in [26 NCAC 02C .0108 General Format Instructions](#). Within the template, there are utilities that allow the user to: pull a rule from the OAH website and insert it directly into your document; apply various formatting styles to the text within a document; insert auto text for the various Introductory Statements required for the submission of a rule; and various other functionality to make the process simpler.

DOWNLOADING THE OAH AGENCY RULES TEMPLATE

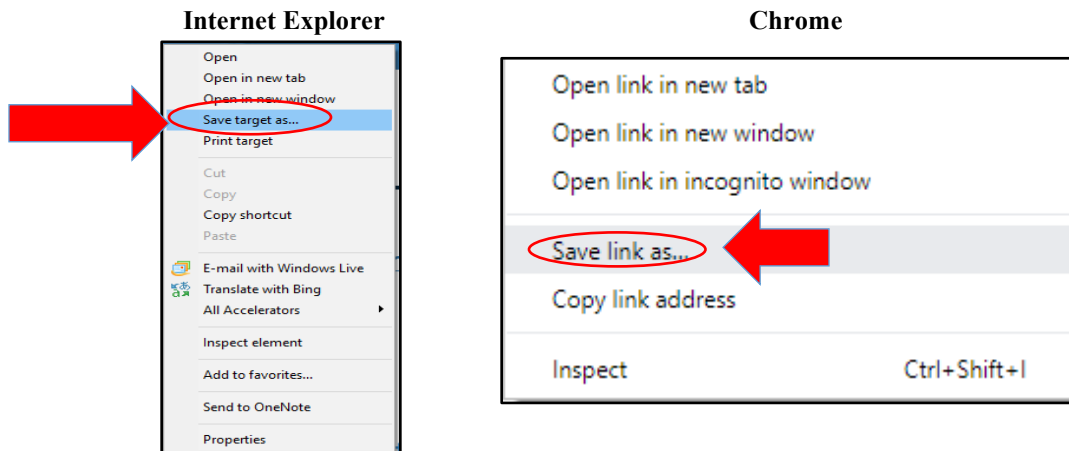
The OAH Agency Rules Template can be downloaded from the "Information For Rulemaking Coordinators" section on the OAH website (<http://www.oah.nc.gov>). To access this section from the OAH website, click on the Rules Division menu and then click on the "Information For Rulemaking Coordinators" link.



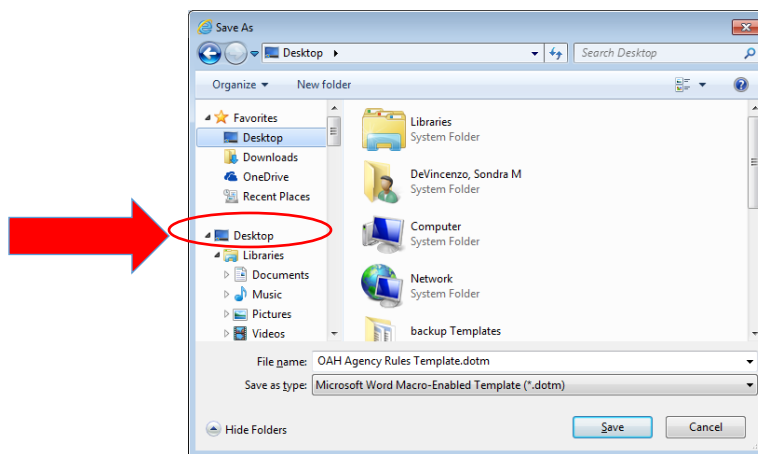
After clicking the "Information For Rulemaking Coordinators" link, scroll down until the Agency Rule Template section is visible.



Right click on the "Rule Template" Link and select the "Save Target As" menu item (Internet Explorer) or the "Save Link As" menu item (Chrome).



The easiest implementation of the Template is to save the template to the user's desktop. This can be accomplished by clicking the "Save As" option and then select Desktop and press the Save Button. It is imperative that you leave the Template named "OAH Agency Rules Template.dotm". Various functionality within the Template requires the standardized naming.

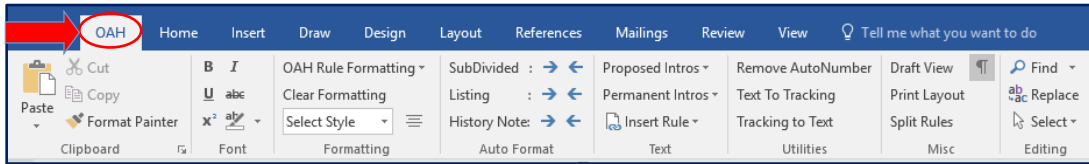


Once the Template has been saved to the Desktop, open the Template by Right Clicking on the Template Icon and selecting Open. The first time the Template is opened, the user will be prompted to Enable the Template. Once the Enable button has been pressed, the user can close the Template. This is only done the first time the template is opened.

It is also possible to store the OAH Agency Rules Template in either the default Word User or Workgroup template locations. This subject is not covered in this documentation but additional information about template locations is discussed in this blog posting which is applicable for Microsoft Word 2010 and higher: <http://www.addbalance.com/word/workgrouptemplates.htm>. The instructions in this document assume that the template is stored on the user's desktop.

CREATING A DOCUMENT BASED ON THE OAH AGENCY RULES TEMPLATE

To use the template, double click on the Template Icon on the Desktop. A new document based on the template will be created. An OAH tab will be added to the Microsoft Word Ribbon as can be seen below:

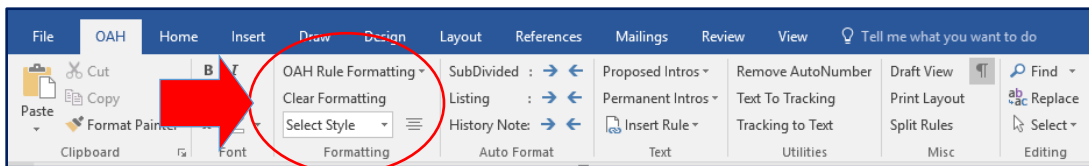


The OAH Tab contains several groups. To allow commonly used Word functionality to be performed without the user having to select another Microsoft Office Ribbon tab, several standard Microsoft Office Groups have been included on this tab. They are:

- Clipboard
- Font
- Editing

The buttons in these groups perform in the same way as the buttons on the Standard Word Ribbon and will not be discussed further here except to mention that changes to existing rules should be made using the underline and strikethrough font attributes – which are available in the Font Group. Language added should be underlined and language removed from an existing rule should be struck through.

FORMATTING GROUP



OAH Rule Formatting Menu

OAH Rule Formatting	SubDivided	Proposed Intros	Remove AutoNumber	Draft View
Rule is Subdivided from the Beginning				
RULE	-- 01 NCAC 01 .1111	RULE NAME AND NUMBER IN BOLD AND ALL CAPS		
PARAGRAPH	-- (a)	This level in a rule is a Paragraph.		
SUBPARAGRAPH	-- (1)	This level in a rule is a Subparagraph.		
PART	-- (A)	This level in a rule is a Part.		
Rule Contains an Introductory Paragraph with a Listing				
RULE	-- 01 NCAC 02 .1111	RULE NAME AND NUMBER IN BOLD AND ALL CAPS		
PARAGRAPH	--	This level in a rule is a Paragraph.		
ITEM	-- (1)	This first level in this format is an Item.		
SUB ITEM LVL 1	-- (a)	This next level of formatting is a Sub-Item.		
SUB ITEM LVL 2	-- (i)	This rule level is also called a Sub-Item.		
Rule Contains a Single Paragraph				
RULE	-- 01 NCAC 01 .1111	RULE NAME AND NUMBER IN BOLD AND ALL CAPS		
PARAGRAPH	--	This level in a rule is a Paragraph. It can be a single paragraph.		
History Note Formatting				
HISTORY	--	History Note: Authority [numerical order of agency authority for rule]		
HISTORY AFTER	--	Eff. [effective date of original adoption of the rule]		
HISTORY AFTER	--	Amended Eff. [these are amendment dates]		
HISTORY AFTER	--	Temporary [Adoption] [Amendment] [Repeal] Eff. [temp rules listed as separate item]		
HISTORY AFTER	--	Repeal Eff. [date agency deletes rule in its entirety, repealed]		
HISTORY AFTER	--	Readopted Eff. [date agency readopts rule]		
Miscellaneous				
CHAPTER	--	Name of Rule Chapter		
SUBCHAPTER	--	Name of Rule Subchapter		
SECTION	--	Name of Section		
BASE	--	Basic Formatting (such as tables)		
SUBPART	--	(i) This level in a rule is a Subpart. (HISTORICAL RULES ONLY)		
SUBSUBPART	--	(f) This level in a rule is a Subsubpart. (HISTORICAL RULES ONLY)		
SUB ITEM LVL 3	--	(A) This rule level is also called a Sub-Item. (HISTORICAL RULES ONLY)		
SUB ITEM LVL 4	--	(f) This rule level is also called a Sub-Item. (HISTORICAL RULES ONLY)		

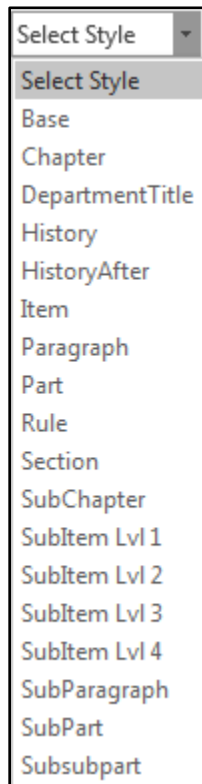
The OAH Rule Formatting dropdown menu displays the acceptable formatting options. The menu is divided to categorize each option. The Style names are displayed in the left column and a description of the styles and enumerations are displayed in the right column. The first three sections contain the three acceptable text options. The fourth section displays the standard language options for History Notes. The fifth section displays less frequently used styles. To apply the applicable formatting (style), select the text to be formatted and click the appropriate menu item. No text will be typed; this menu only applies formatting to the selected text.

[Clear Formatting Button](#)

If you need to “reset” the paragraph and start over, click the Clear Formatting option to remove all formatting from the selected text.

[Select Style Dropdown](#)

The Select Style dropdown menu displays all formatting styles used by OAH. This dropdown may be more efficient for users that are familiar with OAH rule formatting. The style of the currently selected text can be changed by clicking the dropdown arrow and selecting the applicable style.

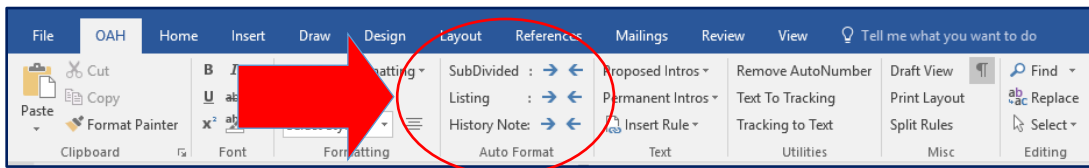


The dropdown shows the available rule formatting styles. **For styles to be correctly applied to the text, the only the two methods of applying styles provided on the OAH tab should be used. The Word styling functionality available on the "Home Tab" may result in underlined, stricken, bolded or italicized formatting being lost when a style is applied.**

Paragraph Center Button

This menu item simply centers the selected text.

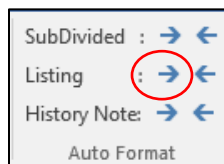
AUTO FORMAT GROUP



The Auto Format Group is another way to format text. To use this option OAH styles must first be applied to the text. The right and left arrow buttons change the style of the text at the location of the cursor to the next or previous style. For example, when drafting a new rule with a list, type the first paragraph of the rule and press enter. This creates a new paragraph in the “Paragraph” format.

Rule	26 · NCAC · 02C · .0108 · GENERAL · FORMAT · INSTRUCTIONS¶
Paragraph	An agency shall format each rule submitted to OAH for publication in the Register or Code as follows:¶
Item	(1) → Paper Specifications:¶

To change the style to the Item level, select the right arrow on the Listing line and the style will be changed.



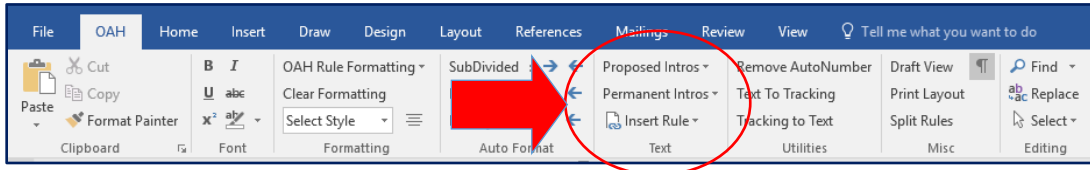
Click the right arrow again to format the text as a Sub-Item level.

Rule	26 · NCAC · 02C · .0108 · GENERAL · FORMAT · INSTRUCTIONS¶
Paragraph	An agency shall format each rule submitted to OAH for publication in the Register or Code as follows:¶
Item	(1) → Paper Specifications:¶
SubItem Lvl 1	(a) → 8½ by 11 inch plain white paper;¶
SubItem Lvl 1	(b) → one side of the sheet only;¶

To return to the Item style click the left arrow button on the listing line.

Rule	26 · NCAC · 02C · .0108 · GENERAL · FORMAT · INSTRUCTIONS¶
Paragraph	An agency shall format each rule submitted to OAH for publication in the Register or Code as follows:¶
Item	(1) → Paper Specifications:¶
SubItem Lvl 1	(a) → 8½ by 11 inch plain white paper;¶
SubItem Lvl 1	(b) → one side of the sheet only;¶
SubItem Lvl 1	(c) → black ink;¶
SubItem Lvl 1	(d) → 10 point font size;¶
SubItem Lvl 1	(e) → portrait print (8½ x 11);¶
SubItem Lvl 1	(f) → numbered lines on the left margin with each page starting with line 1;¶
SubItem Lvl 1	(g) → 1.5 line spacing;¶
SubItem Lvl 1	(h) → page numbers centered at the bottom of the page for each rule that has more than one page of text; and¶
SubItem Lvl 1	(i) → no staples.¶
Item	(2) → Tab and Margin Settings:¶

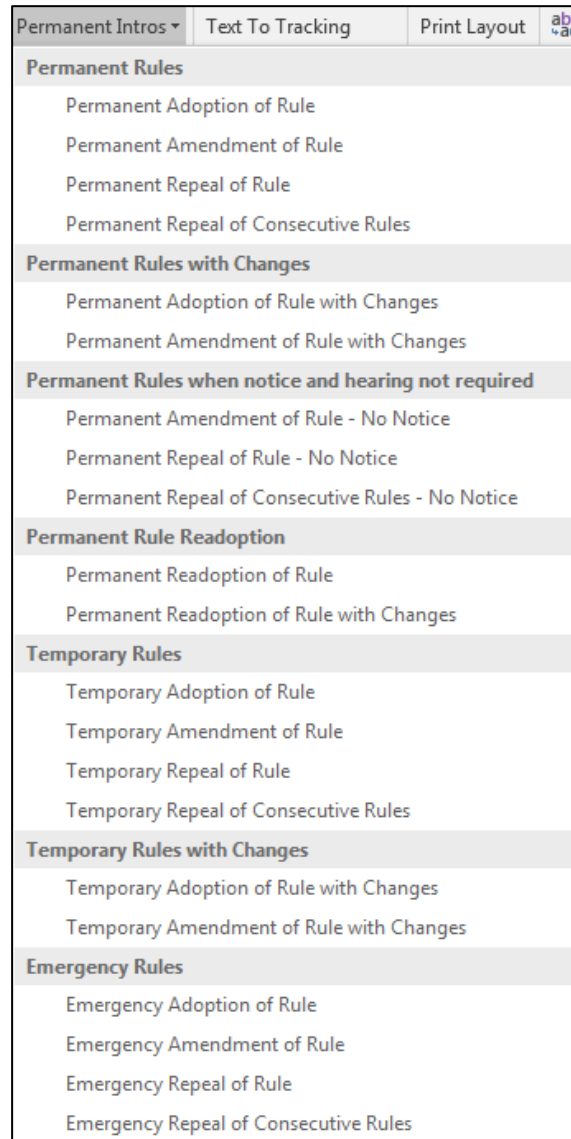
TEXT GROUP



The Text Group provides menu choices that insert introductory statements into a document or insert an entire Chapter, Subchapter, or rule from the OAH online Administrative Code. This group also provides an option to insert a document from a file.

Proposed Intros and Permanent Intros Drop Down Menus

The Proposed Intros and the Permanent Intros dropdowns display text options for introductory statements. Selecting a menu item from the dropdown list inserts the introductory statement at the location of the cursor in the document. A blank line is inserted after the introductory statement. The inserted text will be styled according to the Rule Formatting guidelines.



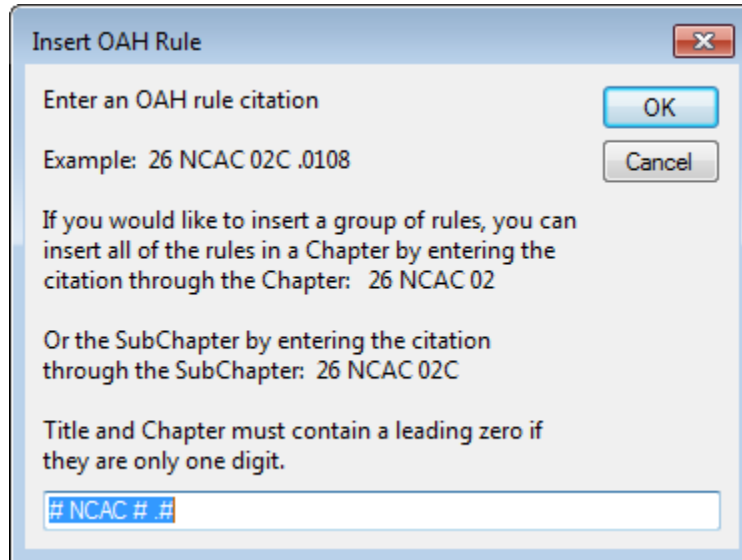
Insert Rule Menu

Copy and paste may cause complications in a Word document. Styles may also complicate how the copy and paste function works and how it impacts the document. It is suggested that the Insert Rule functions are always used to avoid the complications caused by copy and paste.

The Insert Rule Menu currently has two options. The Insert Rule from Code option retrieves the rule(s) from the OAH website and inserts it into the document. The Insert Rule from File will insert a file stored on a computer or network.

Insert Rule from Code

Upon clicking the Insert Rule from Code option, the Insert OAH Rule dialog box will be presented.



Insert OAH Rule

Enter an OAH rule citation

Example: 26 NCAC 02C .0108

If you would like to insert a group of rules, you can insert all of the rules in a Chapter by entering the citation through the Chapter: 26 NCAC 02

Or the SubChapter by entering the citation through the SubChapter: 26 NCAC 02C

Title and Chapter must contain a leading zero if they are only one digit.

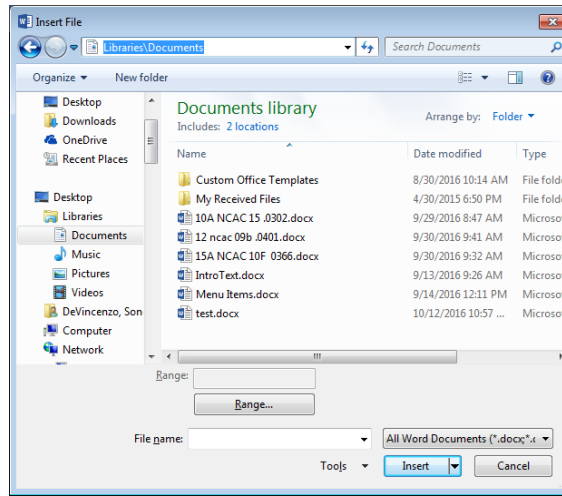
NCAC #

The Insert Rule from Code window allows you to insert an individual rule, all rules contained in a SubChapter, or all rules contained in a Chapter. The operator should type a valid Title, Chapter, SubChapter and Rule number and press the Okay Button. To insert a specific rule, the Title, Chapter, SubChapter (if applicable) and rule number must be entered. To insert a Chapter, the Title and Chapter information must be entered. To insert a SubChapter, the Title and SubChapter fields must be entered. If the rule(s) exist, the text of the currently published rule(s) in the online NC Administrative Code will be inserted into the document. The Title and Chapter/SubChapter numbers that are only a single digit, must be preceded by a zero.

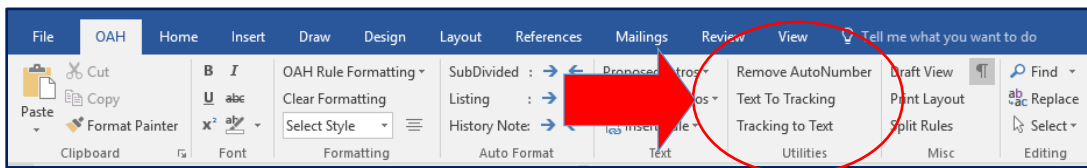
IMPORTANT: The Insert Rule function inserts the text currently published in the NC Administrative Code. If a different version of the rule is in publication, pending Rules Review Commission action or pending Legislative Review, the text of that version of the rule will not be inserted.

Insert Rule from File

The Insert Rule from File option opens the Insert File dialog box so the file can be located and inserted.



UTILITIES GROUP



OAH rulemaking guidelines do not allow agencies to submit rules that contain auto numbered enumerated lists or Microsoft Word revision marks (tracking). OAH recognizes that these features can be beneficial during the rule drafting process, however, they should be removed prior to submitting rules to OAH.

[Remove AutoNumber Button](#)

The Microsoft Word auto number feature automatically alters the indentation level and the wrapping structure of the text. Therefore, when a document is created or opened in the OAH Agency Rules Template, the auto number feature in Word is disabled. Rules that were already in the rulemaking process prior to the introduction of the OAH Agency Rules Template may contain auto numbered lists. For this reason, a Remove AutoNumber feature is included on the toolbar that converts auto numbered lists to standard enumerated text. When this option is selected, there is not a utility to revert the text back to an auto number format.

[Tracking To Text Button](#)

The use of "tracking" may create complications when OAH processes rules for publication in the NC Register and Administrative Code. For this reason, rules should not be submitted to OAH with "tracking".

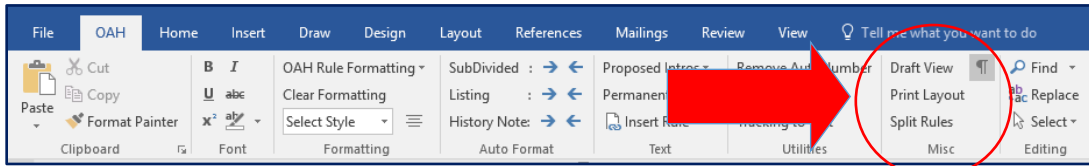
The Tracking to Text feature converts "tracking" to underlining and strikethrough font attributes in the document. Once "tracking" has been converted to text the editorial information regarding when changes were made and by whom will be lost from the document.

NOTE: There can be a great deal of complexity in documents containing "tracking", therefore, it is recommended that after running this utility the agency staff carefully review the document to ensure that the revisions are accurately represented.

[Text to Tracking Button](#)

The rules and notices returned to the agency by OAH will show revision marks as underlining and strikethrough. The Text to Tracking Button converts the underlining and strikethrough in a document back into Microsoft Word revision marks (“Tracking”). The revision data associated with the changes will be that of the user at the time the Text to Tracking Button is pressed.

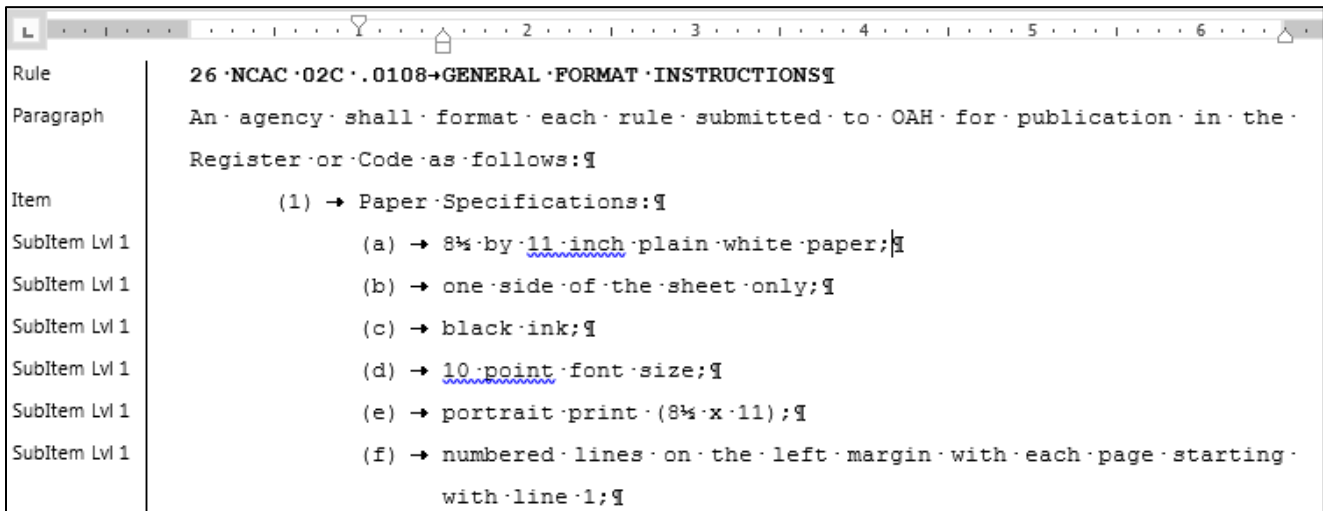
MISC GROUP



The Misc Group provides useful features that may be helpful during the Rule Drafting process. This functionality is discussed below:

[Draft View Button](#)

The Draft View button displays the document in draft view. Draft view shows text formatting but simplifies the layout of the page so that you can type and edit quickly. In draft view, some page elements do not appear, such as the boundaries between pages, headers and footers, backgrounds, and pictures. Draft view is most useful when working with styles because the style associated with each paragraph is shown on the left side of the document.



[Print Layout Button](#)

The Print Layout button displays the document in print layout view. The print layout view displays the document as it appears on the printed page. Print layout view is the default view when you open a new document.

[Split Rule Button](#)

It is often helpful to work on multiple rules in one document, but OAH requires that rules be filed as individual rule documents. The Split Rule Button divides the currently displayed document into individual rules. The utility uses the history note or authority line to determine where a rule ends. It uses the rule citation to name the individual rule document. Rule range documents will be created if there are multiple rule citations with only one history note (as is often the case for repealed rules). The original document

must be saved before you click the Split Rule button, and the document must contain more than one rule. The original document is not modified.

[Show/Hide \(Paragraph Mark\) Button](#)

Pressing the Show/Hide button allows the non-printing characters to be revealed or shown in a document. "Nonprinting characters" is Word's term for anything that takes up space or has a formatting function but does not appear on the printed page, including spaces, tabs, page, or paragraph breaks, etc. This button is primarily used to be able to identify formatting or spacing issues in word processing documents. This button allows the user to quickly show or hide these characters.

WORKING WITH DOCUMENTS CREATED BEFORE THE TEMPLATE WAS AVAILABLE

To take advantage of the features available in the OAH Agency Rules Template for documents that were in the Rulemaking Process prior to the implementation of the OAH Agency Rules Template, you must create a new document based on the Template and insert your existing document into the newly created document. Although copy and paste will work, we recommend that you use the insert feature to include the contents of existing documents into your documents.

[Create a New Document based on the OAH Agency Rules Template](#)

Double click on the Template Icon on the Desktop. A new document based on the template will be created.

[Insert existing Document](#)

Use the **Insert Rule from File** function described previously in this document to navigate to the location of your existing rule document and insert that document into your newly created Template based document.

Appendix A

Attaching the OAH Agency Rules Template to an Existing Document

The OAH Agency Rules Template documentation suggests storing the OAH template on your desktop. This works great in a single user environment. However, many Rulemaking Coordinators work in a collaborative environment. Each agency has their own recommendations and computer configurations. That makes it difficult to recommend a solution that will work for all agencies. The ideal setup in a multiuser environment would be to utilize Microsoft Word's "WorkGroup" template feature. This requires that all user workstations have a single location specified as their "workgroup template location" and the OAH template be stored there. This requires access to a common drive by all users and configuration of each user's installation of Microsoft Word. This may not be possible for all agencies.

The biggest challenge in a multiuser environment is that when a document is opened, Word may not be able to correctly locate the OAH template since the template is not located consistently. This is most common when Rulemaking documents are emailed among users. When a document created with the OAH template is emailed, the template will not be attached when it reaches the Recipient.

To Work around this issue, we are suggesting the following possible approaches.

- You can create a new document using the OAH template stored on your computer and insert the contents of the document you received into new document. Save that document and begin working.
- If you would prefer not to create a new document, we have documented two options that you can utilize to attach the OAH Agency Rules Template to your document.
 - You can Attach the OAH template to your document using the Word Menu.
 - You can create a Macro and add the Macro to your Quick Access Toolbar.

These two options are described below.

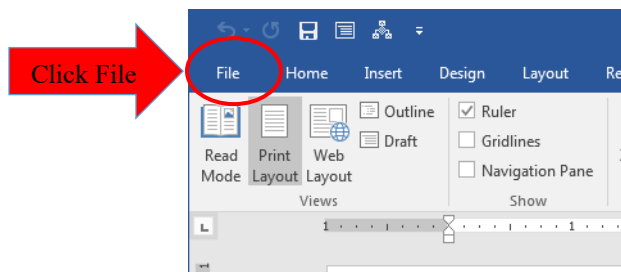
NOTE: **The OAH Agency Rules Template should only be used on documents that you know were originally created using the OAH Agency Rules Template.** Attaching the template to a document that was not created using the OAH Agency Template will most likely result in repeated errors being displayed while attempting to work on the document.

Attaching the OAH Template to your Document using the Word Menu

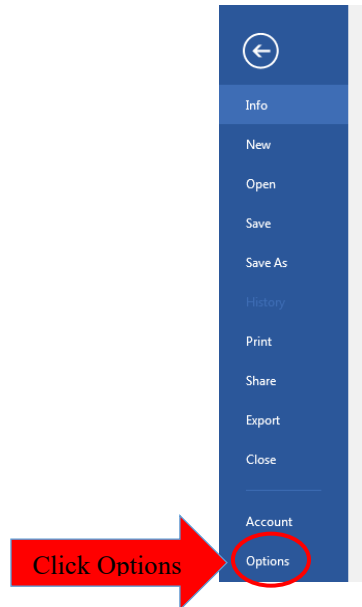
Enable the Developer Tab on the Word Ribbon

You must first enable the Developer tab on the Word Ribbon before you can access the Template menu item in Microsoft Word. The following steps only have to be performed once. After you have enabled the Developer Tab, you can go straight to the Attach Template instructions below. Enabling the Developer Tab is accomplished as follows:

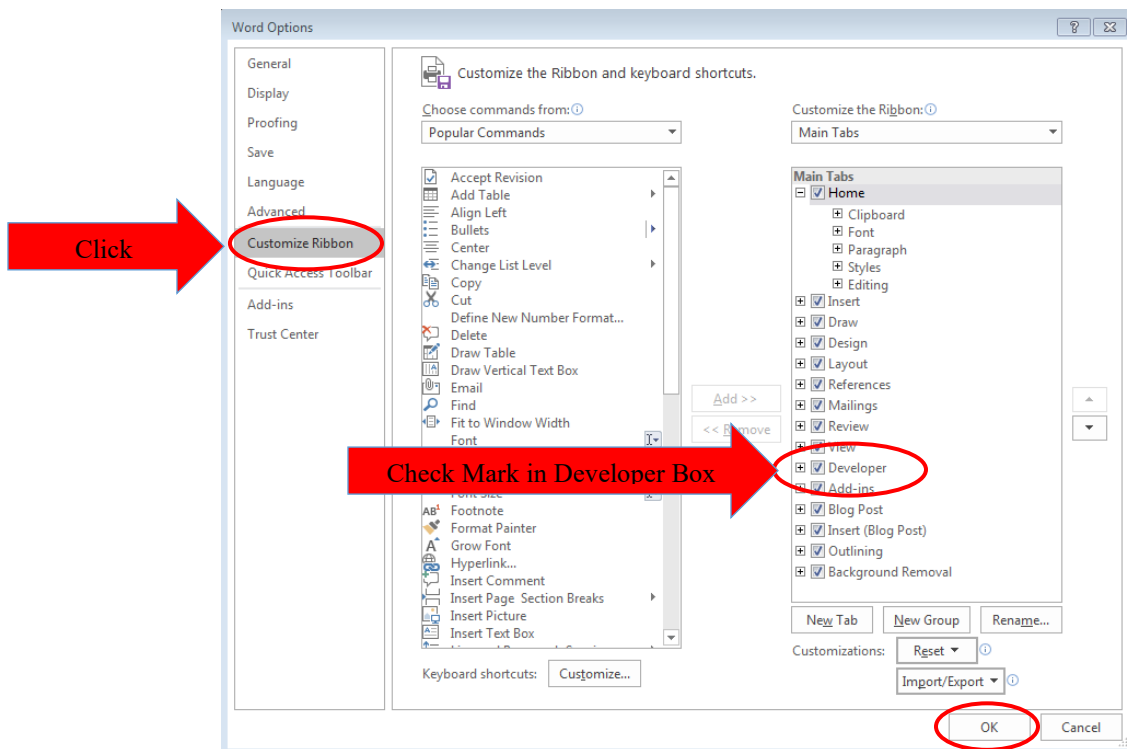
1. Click on File on the Word Ribbon



2. The File Menu will be displayed. Select Options.



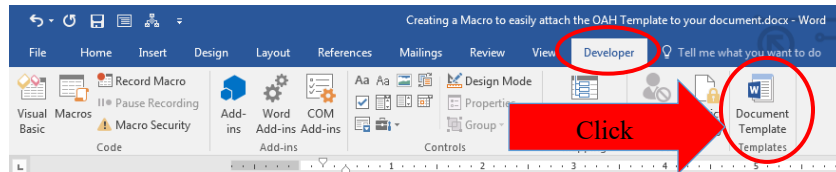
3. The Word Options Menu will be displayed. Click Customize Ribbon.



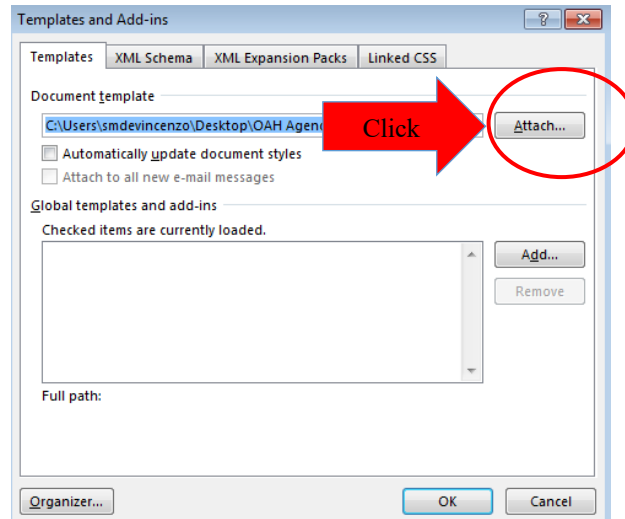
4. The Customize “The Ribbon and Keyboard Shortcuts window” will be displayed. Put a Checkmark in the Developer box in the right-hand list box and click OK. You will now have the Developer Tab on your Word Toolbar.

Attach the OAH Agency Rule Template to your Document

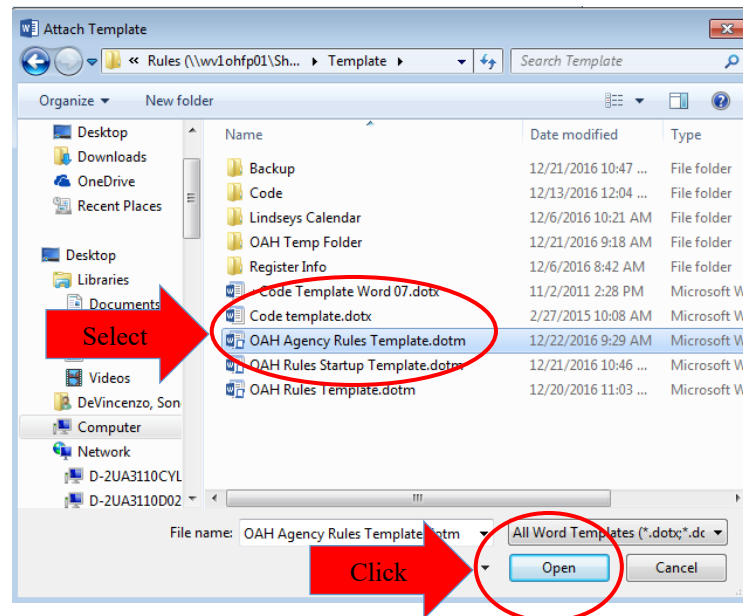
1. After you have access to the Developer Tab, attaching the OAH template is straight forward. You click on the Developer tab and click the Document Template Button.



2. After you have access to the Developer Tab, attaching the OAH template is straight forward. You click on the Developer tab and click the Document Template Button. The “Templates and Add-ins” window will be displayed. On that window, click the Attach Button.



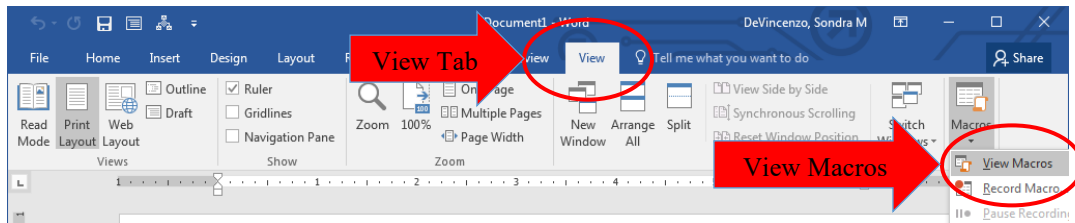
3. The “Attach Template” window will be displayed. Navigate to the location on your computer where the document is stored and select the OAH Agency Rules Template. Click Open.



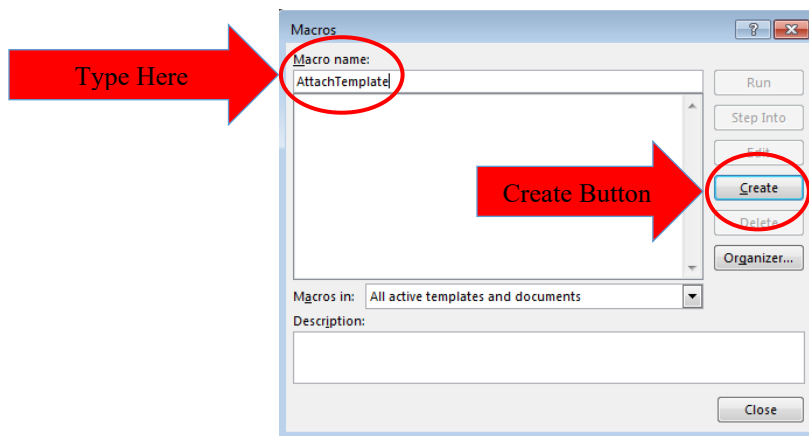
4. Click on the OK button when the “Templates and Add-Ins” window is displayed. The OAH template is now attached to your document, and you should see the OAH tab on the Microsoft Word window.

Creating a Macro to Attach the OAH Template to your Document

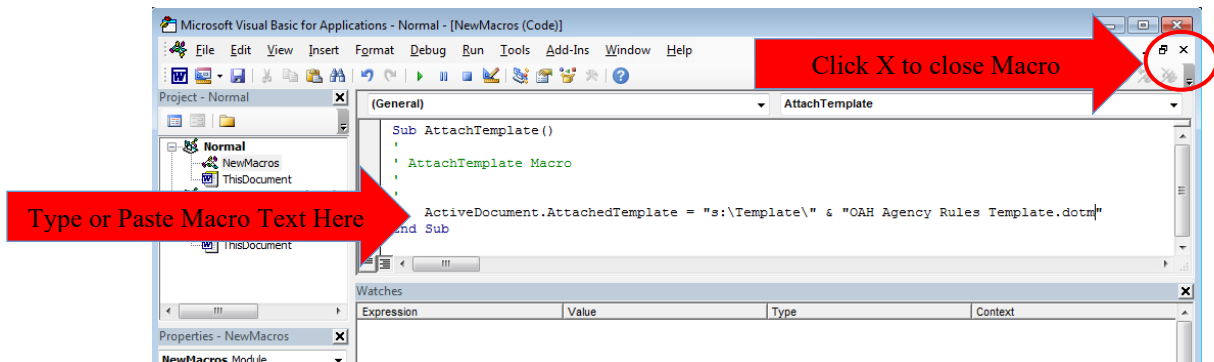
1. Open Word with a Blank Document
2. Click on the View Tab
3. Click on the Macros Button
4. Click on the View Macros Menu Item



5. After Clicking the View Macros Menu Item, the Macros window will be displayed.
 - a. Type AttachTemplate in the Macro name field (No spaces)
 - b. Click the Create Button

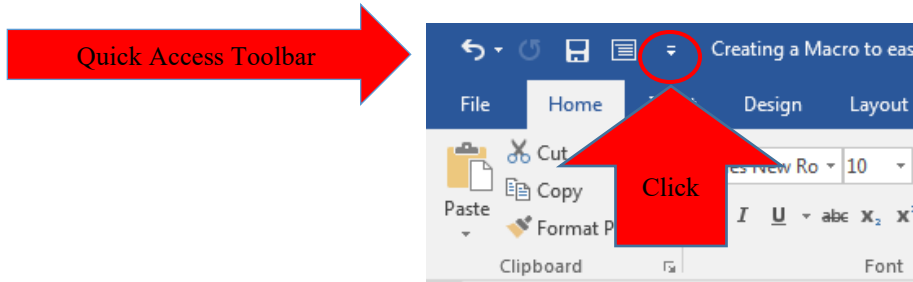


6. After Clicking the Create Button the New Macros Window will be displayed:

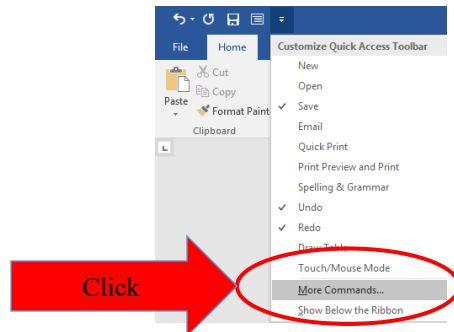


7. Copy or Type the following text into the macro as show above:
ActiveDocument.AttachedTemplate = "YOUR FILE LOCATION" & "OAH Agency Rules Template.dotm"
Replace YOUR FILE LOCATION with the file location where you stored the template. For example,
S:\Template
You must have a backslash at the end of the file location.
8. Click the X to Close the New Macros Window. You have now created the macro that will attach the OAH template to your document.

9. The next step is to add the macro to Words Quick Access Toolbar so that it will be easily available to you. Click on the Customize Quick Access Toolbar Drop Down arrow on the right side of your Quick Access Toolbar:

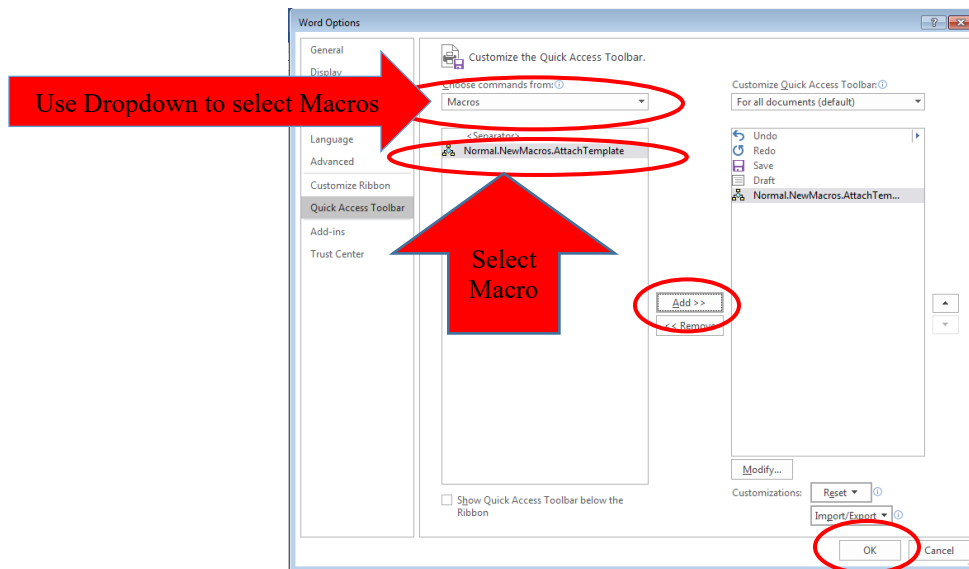


10. The Customize Quick Access Toolbar menu will be displayed. Click More Commands.

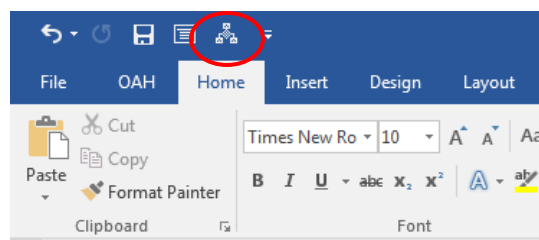


11. The Word Options Menu will be displayed:

- Click the More Commands Drop Down and Select Macros
- Click on the Attached Template Macro in the left-hand list box and click the Add Button. The macro will be added to the right-hand list box. Click the OK button to close the Word Options Window.



12. The Macro will now be displayed on your Quick access toolbar. If you do not see the OAH tab on your Word Toolbar, you can click the Macro Icon on your tool bar and the OAH template will be attached, and the toolbar will be visible.



APPENDIX B – Rule Formatting

There are three ways to format a rule. The format options are:

1. Subdivided from the beginning
2. Introductory paragraph with a listing
3. Single paragraph

The History Note will be formatted a little differently than the rule itself.

NOTE: There are several styles that have been retired. These styles are only valid for existing rules that already contain these styles. They are SubPart, SubsubPart, SubItem Lvl 3, and SubItem Lvl 4. These styles are noted with (HISTORICAL USE ONLY) in the tables below.

The following tables provide formatting details for each rule style and the History Note:

If a Rule is Subdivided from the Beginning, Use this Sequence:

Style	Rule Text
Rule	01 NCAC 01 .1111 RULE NAME AND NUMBER IN BOLD AND ALL CAPS
Paragraph	(a) This level in a rule is a Paragraph . You do not skip a line between the rule name/number and the beginning of this Paragraph. After typing the letter in parenthesis, it is followed with 2 spaces. The first level of a rule (Paragraph) is the only time in a rule that the item in parenthesis is followed by 2 spaces instead of an tab.
Subparagraph	(1) This level in a rule is a Subparagraph . You do not skip a line between the Paragraph and Subparagraph. After typing the number in parenthesis, it is followed with 1 tab. (2) Remember – Any new level of a rule must have at least two items to create another subdivision.
Part	(A) This level in a rule is a Part . You do not skip a line between the Subparagraph and Part. After typing the letter in parenthesis, it is followed with 1 tab.
SubPart	(i) This level in a rule is a SubPart . (HISTORICAL RULES ONLY)
SubsubPart	(l) This level in a rule is a SubPart . (HISTORICAL RULES ONLY)
Paragraph	(b) Return to the left margin for the next Paragraph. The text is flush with the left margin and no lines are skipped between the different sections of the rule. The parenthesis is followed by two spaces.

If a Rule Contains an Introductory Paragraph with a Listing, Use this Sequence:

Style	Rule Text
Rule	01 NCAC 02 .1111 RULE NAME AND NUMBER IN BOLD AND ALL CAPS
Paragraph	The opening paragraph is formatted with the text flush to the left margin and each consecutive line will wrap around to the left margin as shown here.
Item	(1) The first level in this type of format is called an Item . After typing the number in parenthesis, it is followed with 1 tab. (2) Remember – Any new level of a rule must have at least two items to create another subdivision.
SubItem Lvl 1	(a) This next level in formatting this way is a Sub-Item . You do not skip a line between the Item and Sub-Item. After typing the letter in parenthesis, it is followed with 1 tab.
SubItem Lvl 2	(i) This level in a rule is also called a Sub-Item . You do not skip a line between the different levels of Sub-Items. After typing the letter in parenthesis, it is followed with 1 tab.
SubItem Lvl 3	(A) This level in a rule is also called a Sub-Item . (HISTORICAL RULES ONLY)
SubItem Lvl 4	(l) This level in a rule is also called a Sub-Item . (HISTORICAL RULES ONLY)

If a Rule Contains a Single Paragraph, Use this Format:

Style	Rule Text
Rule Paragraph	01 NCAC 03 .1111 RULE NAME AND NUMBER IN BOLD AND ALL CAPS A rule can be a single paragraph. Do not skip a line between the rule name/number and the first line of the paragraph. There are no subdivisions in this type of formatting.

History Note Format:

Style	Rule Text
History	<i>History Note:</i> Authority [list in numerical order the citations to the agency's authority for the rule; all citations are separated by a semicolon; and the last citation also ends with a semicolon];
HistoryAfter	Eff. [this is the effective date of the original adoption of the rule];
HistoryAfter	Amended Eff. [these are amendment dates to the rule and shall be listed in chronological order, with the most recent amended date listed first];
HistoryAfter	Temporary [Adoption][Amendment][Repeal] Eff. [Temporary rules are listed as a separate item];
HistoryAfter	Repealed Eff. [If an agency deletes the rule in its entirety, this is a repeal. This rule number and history note can never be used again.
	NOTE: The most current effective date which is on the last line of the History Note, must be underlined completely if it is a new rule and if it is an adoption or repeal, then the new date must be the first shown and underlined

Miscellaneous Format:

Style	Rule Text
Chapter	CHAPTER 01 - RULE CHAPTER NAME
SubChapter	(Should always appear at the top of the first rule in a Chapter) SUBCHAPTER 01A – RULE SUBCHAPTER NAME
Section	(Should always appear at the top of the first rule in a SubChapter) SECTION .0100 – RULE SECTION NAME
Base	(Should always appear at the top of the first rule in a Section) The Base style should be applied to any paragraph that does not meet the other styling guidelines outlined in the document. The Base style is generally applied to blank lines, tables, and forms.