

# 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 Rule Making Coordinators can use to facilitate the rule making 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.

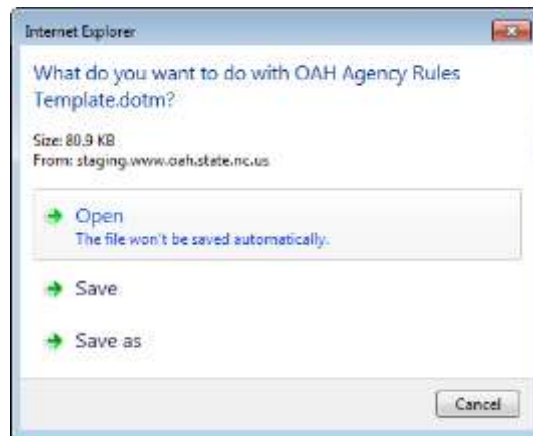
The template was developed to assist the Rule Making Coordinators create a document that adheres to the requirements set out in [26 NCAC 02C .0108 General Format Instructions](#). Within the template, there are utilities that allow the coordinator to: pull a rule from the OAH website and insert it directly 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 Rulemaking Coordinator Section in the Rules Division area of the OAH website (<http://www.oah.state.nc.us/rules/>). To download the Template, you click on the “Rule Template” link.



After clicking the “Rule Template” link, Internet Explorer will prompt the user with the Open, Save, Save As Dialog box. (Testing was done using Internet Explorer, other Browsers may have slightly different prompts.)



In the testing performed during the development of the Template, the easiest implementation of the Template was to save the template to the operator’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, the operator should open the Template by Right Clicking on the Template Icon and selecting Open. The first time the template is opened, the operator will be prompted to Enable the Template. Once the Enable button has been pressed, the operator can close the Template.**

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://blogs.msmvps.com/wordmeister/2013/02/06/word-2013-templates-location-and-filenew/>. The instructions in this document assume that the template is stored on the operator’s desktop.

## CREATING A DOCUMENT BASED ON THE OAH AGENCY RULES TEMPLATE

To use the template, the operator should 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 a number of groups. In order to allow commonly used Word functionality to be performed without the operator 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 exactly 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 |
|---|--|-----------------|-------------------|------------|
| <b>Rule is Subdivided from the Beginning</b>                  |  |                 |                   |            |
| RULE  | — (I) NCAC 01.1111. RULE NAME AND NUMBER IN BOLD AND ALL CAPS                        |                 |                   |            |
| PARAGRAPH   | — (a) This level in a rule is a Paragraph.   |                 |                   |            |
| SUBPARAGRAPH  | — (I) This level in a rule is a Subparagraph.  |                 |                   |            |
| PART  | — (A) This level in a rule is a Part.  |                 |                   |            |
| <b>Rule Contains an Introductory Paragraph with a Listing</b> |  |                 |                   |            |
| RULE  | — (I) NCAC 01.1111. RULE NAME AND NUMBER IN BOLD AND ALL CAPS                        |                 |                   |            |
| PARAGRAPH   | — This level in a rule is a Paragraph.   |                 |                   |            |
| ITEM  | — (I) 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.                                     |                 |                   |            |
| <b>Rule Contains a Single Paragraph</b>                       |  |                 |                   |            |
| RULE  | — (I) 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.                 |                 |                   |            |
| <b>History Note Formatting</b>                                |  |                 |                   |            |
| HISTORY   | — History Note: Authority (numerical order of agency authority for rule)             |                 |                   |            |
| HISTORY AFTER   | — ER. (effective date of original adoption of the rule)                              |                 |                   |            |
| HISTORY AFTER   | — Amended ER. (these are amendment dates)  |                 |                   |            |
| HISTORY AFTER   | — Temporary (Adoption) (Amendment) (Repeat) ER. (temp rules listed as separate item) |                 |                   |            |
| HISTORY AFTER   | — Repeal ER. (date agency deletes rule in its entirety, repealed)                    |                 |                   |            |
| HISTORY AFTER   | — Readopted ER. (date agency readopts rule)  |                 |                   |            |
| <b>Miscellaneous</b>  |  |                 |                   |            |
| 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  | — (I) This level in a rule is a Subsubpart. (HISTORICAL RULES ONLY)                  |                 |                   |            |
| SUB ITEM LVL 1  | — (a) This rule level is also called a Sub-Item. (HISTORICAL RULES ONLY)             |                 |                   |            |
| SUB ITEM LVL 4  | — (i) This rule level is also called a Sub-Item. (HISTORICAL RULES ONLY)             |                 |                   |            |

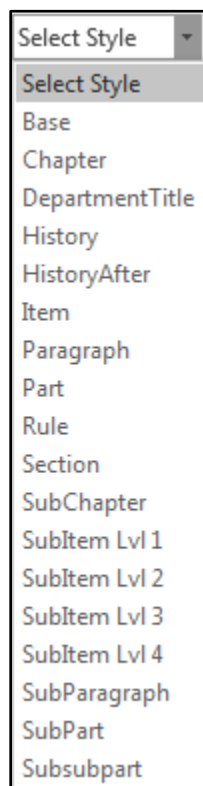
The OAH Rule Formatting dropdown menu presents the operator with a visual display of the formatting options for each acceptable Rule Format. The Menu is divided to categorize various Rule formatting options. For each line of the menu, the Style name is displayed in the left column and a description of the appropriate language or enumeration is displayed in the right column. As you can see, the first three sections of the menu contain standard Rule options. The fourth section represents the various options to be included in the History Note Section and lastly there is a section that groups the less frequently used styles. To select the appropriate formatting, the operator should click the appropriate menu item. The text currently selected in the document will be formatted according to the menu selection. No text will be typed; this menu only applies formatting to the selected paragraph.

### [Clear Formatting Button](#)

With many formatting options available in word it is sometimes helpful to “reset” the text and start over. The Clear Formatting options will remove all formatting from the selected text.

### [Style Selector Combo Box](#)

As the operator becomes more familiar with the Rule Making formatting styles, it may be more efficient for the operator to select a paragraph style directly from the Style Selector Combo Box. The operator may change the style of the currently selected text by clicking the drop down arrow and selecting the desired style.

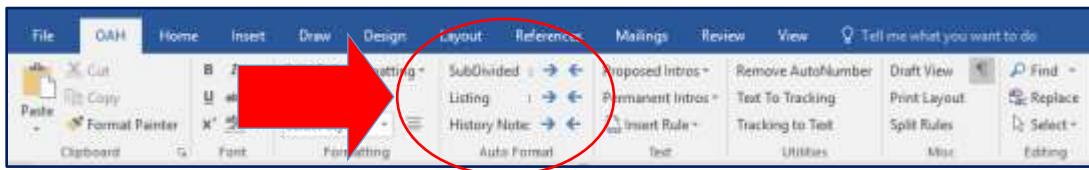


The dropdown shows the available Rule Making formatting styles. **In order for the styles to be correctly applied to the text, the operator should use only the two methods of applying styles provided on the OAH tab. The Word styling functionality available on the "Home Tab" may result in underlined,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

## Paragraph Center Button

This menu item simply centers the selected text.

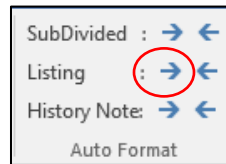
## AUTO FORMAT GROUP



When drafting new Rules, or making significant changes to existing Rules, the operator may find it helpful to use the features of the Auto Format Group to apply the appropriate formatting to text. The right and left arrow buttons change the style of the paragraph containing the cursor to the next or previous style appropriate for the option selected. For Example, if the operator is drafting a new Listing Style Rule, they type the first paragraph of the rule and press enter. This creates a new paragraph with the “Paragraph” format. This may be appropriate, but the operator may want to follow the paragraph with enumerated items.

|           |   |
|-----------|---|
| 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:   |

Instead of selecting the Item Style using options available in the Formatting Group, the operator may select the right arrow on the Listing line and the style will be changed.



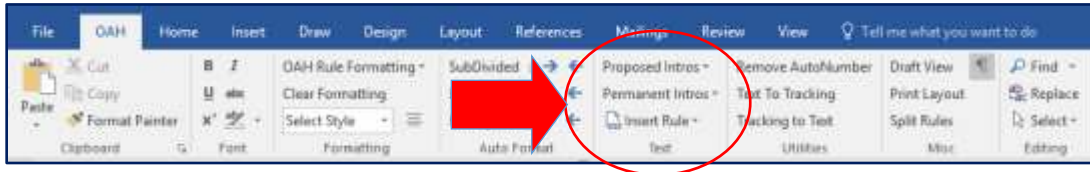
Additionally, they can use the right arrow again to format the text as a SubItem level.

|               |   |
|---------------|---|
| 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) → 8 1/2 by 11 inch plain white paper:   |
| SubItem lvl 1 | (b) → one side of the sheet only:   |

When the operator has finished with the SubItems, they can press the left arrow button on the listing line to return to the Item formatting style.

|               |  |
|---------------|--|
| 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) → 8 1/2 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 (8 1/2 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:   |

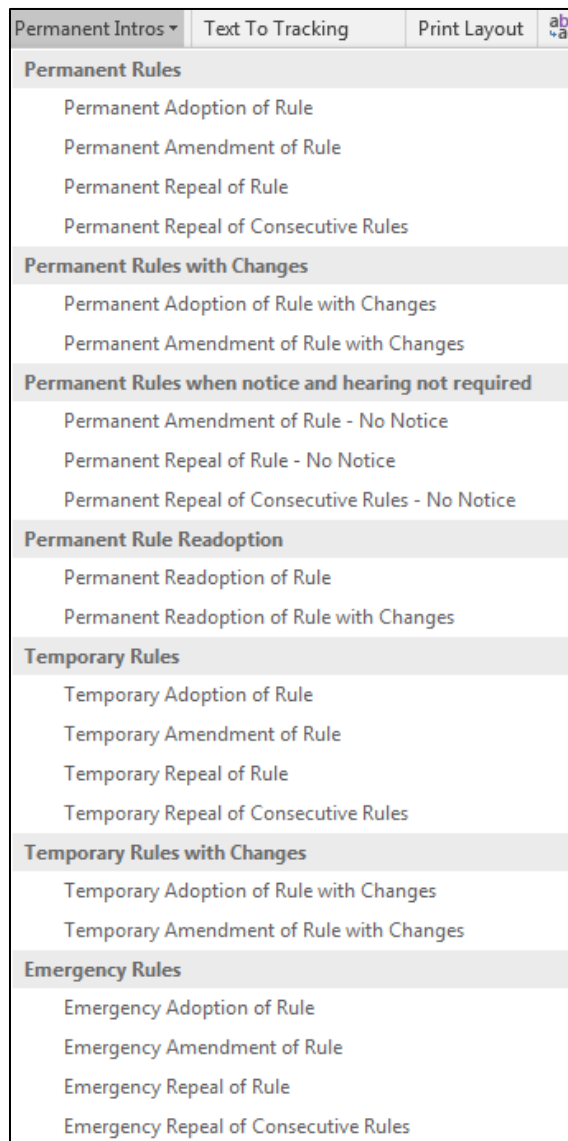
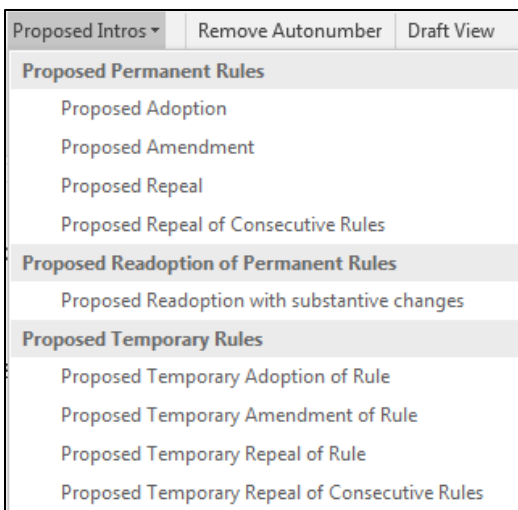
## TEXT GROUP



The Text Group provides functionality that will automatically insert language into the Rule document. Currently the Group offers menu choices that allow the operator to insert introductory language into a document or Insert the entirety of a Rule from the OAH website into the document.

### *Proposed Intros and Permanent Intros Drop Down Menus*

The Proposed Intros and the Permanent Intros Drop Down menu items operator in exactly the same way. When the operator selects the appropriate menu time from the dropdown list, the introductory text will automatically be inserted at the top of the open document. A blank paragraph is also inserted after the introductory language. Both paragraphs will be styled according to the Rule Making Formatting guidelines.





## Insert Rule Menu

Copy and Paste often behaves unexpectedly in a Word document. Styles may also complicate how the copy and paste function works and how it impacts the document. For this reason, it is suggested that the operator always use the Insert Rule functions, when possible, and avoid the complications caused by copy and paste.

The Insert Rule Menu currently has two options. The Insert Rule from Code option will retrieve the Rule(s) from the OAH website and insert it into the document. The Insert Rule from File will allow the operator to select a file stored on their computer or network and insert that document.

### Insert Rule from Code

The Upon pressing the Insert Rule from Code Button, the operator will be presented with the Insert OAH Rule dialog box.

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.

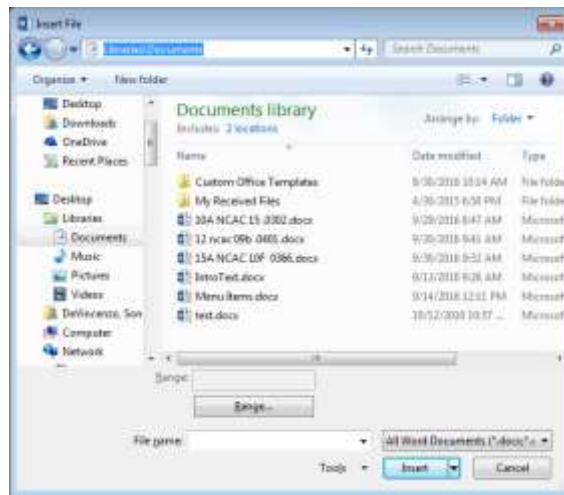
# NCAC # #

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 Retrieve Button. To insert a specific Rule, the Title, Chapter, SubChapter (if applicable) and Rule number should be entered. To insert a Chapter, the Title and Chapter information must be entered. To insert a SubChapter, the Title, Chapter and SubChapter fields must be filled. If the document exists, the text of the currently published rule(s) in the NC Administrative Code stored on the OAH website will be inserted into the document. The Operator should note that Title and Chapter numbers that are only one digit, must be preceded by a zero.

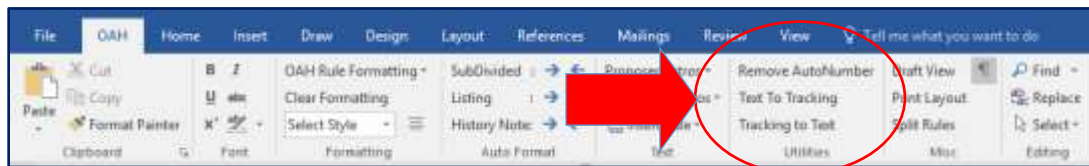
**IMPORTANT:** The operator must be aware of any ongoing Rule Making that is in process for the Rule being amended. The Insert Rule function inserts the text currently published in the NC Administrative Code. If the Rule in a modified format is pending Rules Review Commission action or Legislative Review, the text of that version of the rule will not be inserted.

## Insert Rule from File

The Upon pressing the Insert Rule from File Button, the operator will be presented with the Insert File dialog box. The operator may then navigate to the appropriate location and the selected file will be inserted.



## UTILITIES GROUP



OAH Rule Making guidelines do not allow agencies to submit Rules that contain Auto Numbered enumerated lists or Microsoft Word Revision Marks (Tracking). While we understand that these features can be beneficial during the Rule Drafting process, they should be removed prior to submitting your Rule to OAH.

### [Remove AutoNumber Button](#)

Microsoft Words Auto Number feature automatically alters the indentation level and the wrapping structure of the underlining text. For this reason, when a document is created or opened linked to the OAH Agency Rules Template, the AutoNumber feature in Word is disabled. Rules that were already in the Rule Making process prior to the introduction of the OAH Agency Rules Template may contain AutoNumbered lists. For this reason, a feature has been included on the toolbar that will convert AutoNumbered list to standard enumerated text. Once this option has been selected, there is not a utility to revert the text back to an AutoNumber format.

### [Tracking To Text Button](#)

Microsoft Words Revision tools can be very useful during the agency Rule Drafting process. Using Revision Marks (“Tracking”) can enable staff within the agency to coordinate on the modifications to the Rule and review when changes were made and by whom. They do make editorial changes more difficult as documents from various agencies are pulled together by the OAH Rules Division. For this reason, the OAH Rules do not allow “Tracking” to be included in submitted documents.



Having realized the advantages that “Tracking” may provide for agencies, a feature has been provided that will convert “Tracking” to Underlining and Strikethrough font attributes in the document. Please note that 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](#)

When Rules are returned to the agency by OAH, revision marks will be shown as underlining and strikethrough. The Text to Tracking Button will convert the underlining and strikethrough in a document back into Microsoft Word Revision Marks (“Tracking”). Please keep in mind that the revision data associated with the changes will be that of the operator at the time the Text to Tracking Button is pressed.

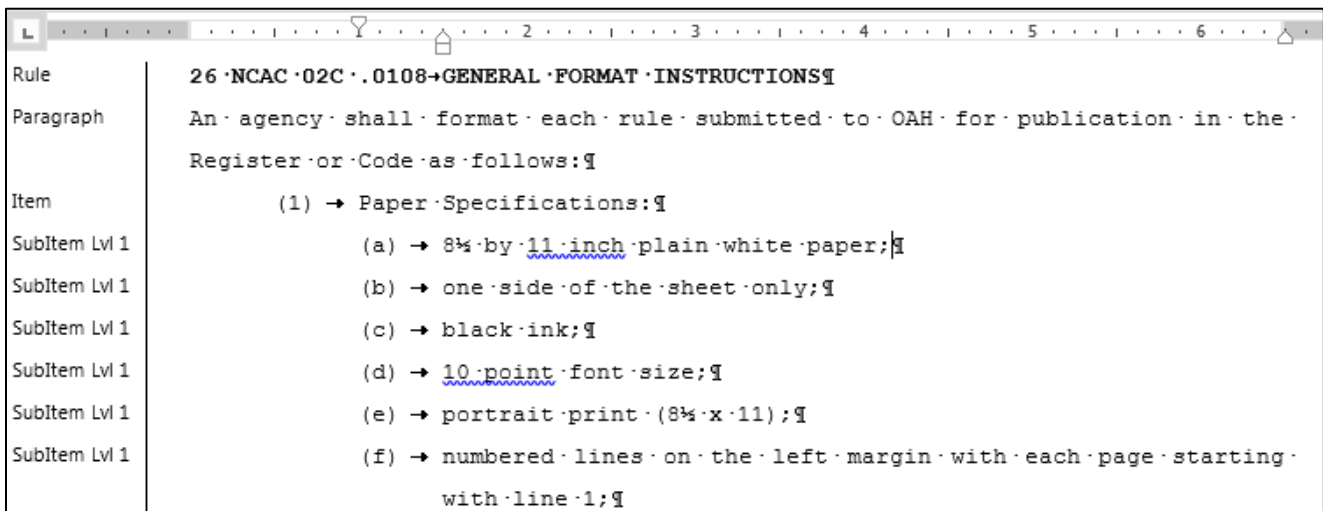
## **MISC GROUP**



The Misc Group provides useful features that may be helpful to the operator 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 hand side of the document.



### [Print Layout Button](#)

The Print Layout button displays the document in print layout view. This allows the operator to see 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 several rules in one document. OAH requires that Rules be filed with OAH 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 your 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. Showing the "Nonprinting characters" It is primarily used to be able to identify formatting or spacing issues in word processing documents. This button allows the operator 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 Rule Making 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 Rule Making 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 Words “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 Rule Making 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.

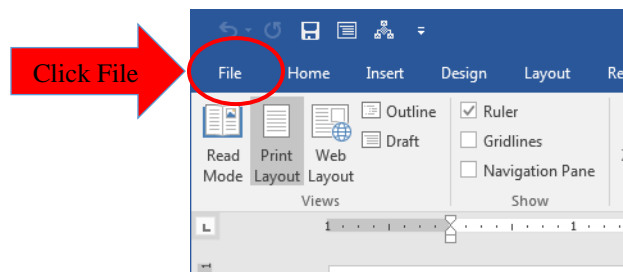
**NOTE:** **The OAH Agency Rules Template should only be used on documents that you know were originally created using the OAH Agency Rules Template.** Attaching the template to a document that was not created using the OAH Agency Template will most likely result in repeated errors being displayed while 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 enable the Developer Tab, you can go straight to the Attach Template instructions below. Enabling the Developer Tab is accomplished as follows:

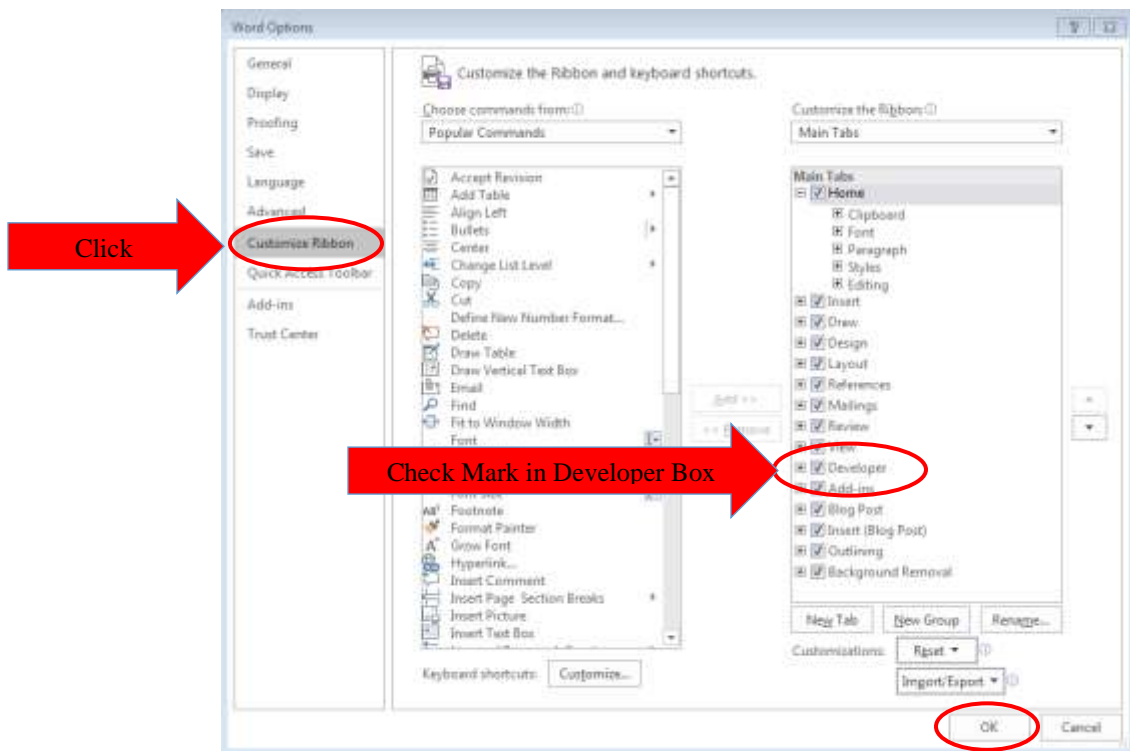
1. Click on File on the Word Ribbon



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



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



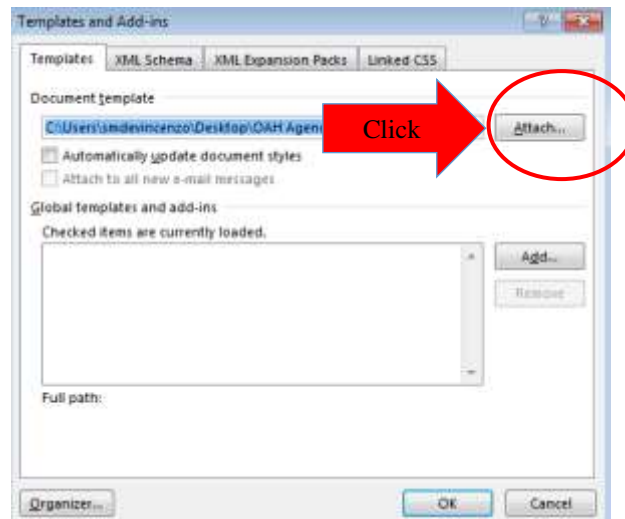
4. The Customize “The Ribbon and Keyboard Shortcuts window” will be displayed. Put a Checkmark in the Developer box in the right hand list box and click OK. You will now have the Developer Tab on your Word Toolbar.

## Attach the OAH Agency Rule Template to your Document

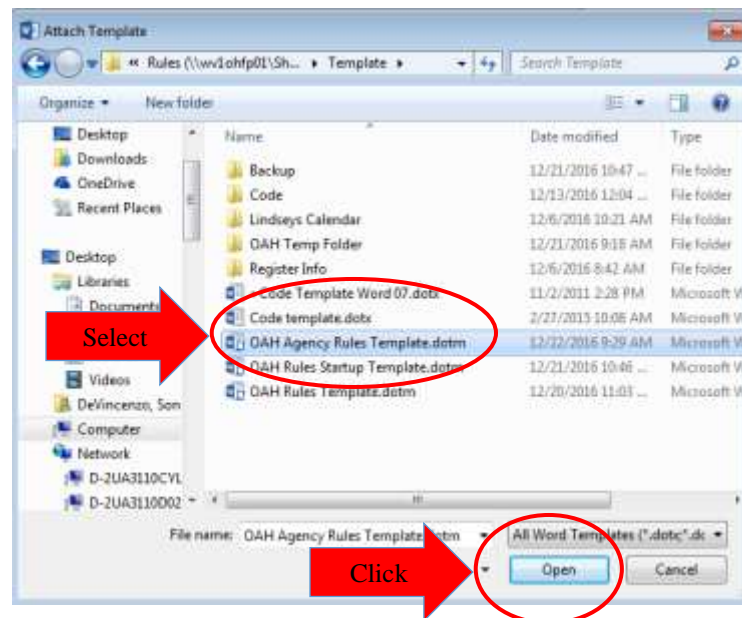
1. After you have access to the Developer Tab, attaching the OAH template is fairly straight forward. You click on the Developer tab and click the Document Template Button.



2. After you have access to the Developer Tab, attaching the OAH template is fairly 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.



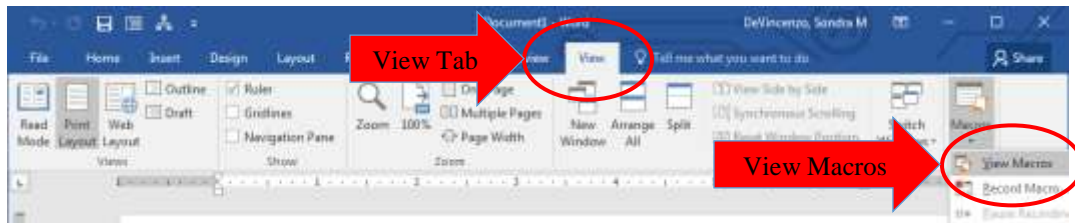
3. The “Attach Template” window will be displayed. Navigate to the location on your computer where the document is stored and select the OAH Agency Rules Template. Click Open.



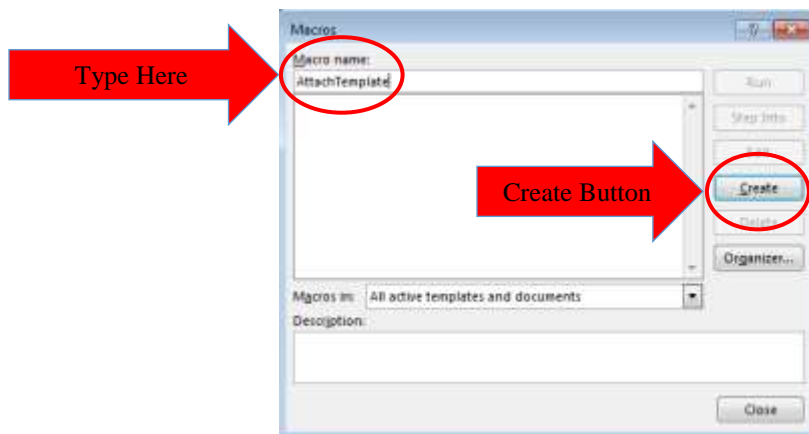
4. Click on the OK button when the “Templates and Add-Ins” window is displayed. The OAH template is now attached to your document and you should see the OAH tab on the Microsoft Word window.

# Creating a Macro to Attach the OAH Template to your Document

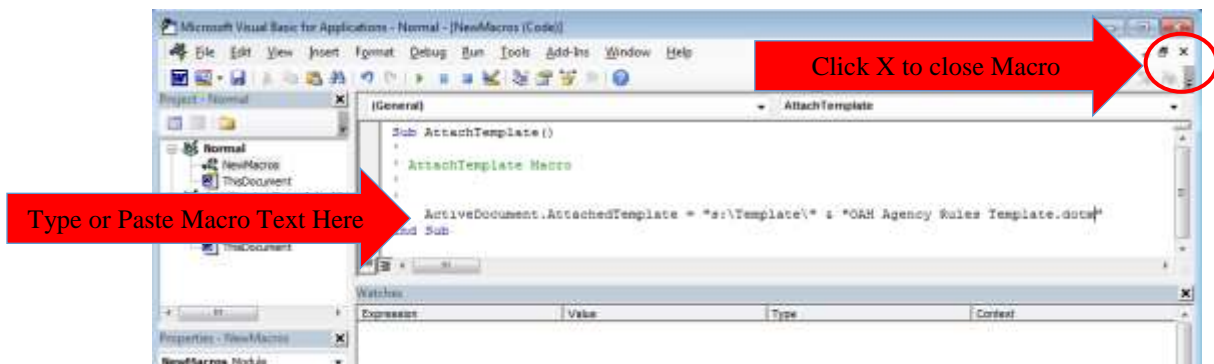
1. Open Word with a Blank Document
2. Click on the View Tab
3. Click on the Macros Button
4. Click on the View Macros Menu Item



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



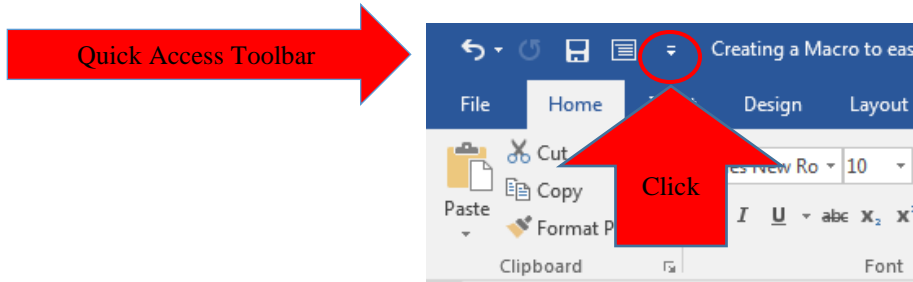
6. After Clicking the Create Button the New Macros Window will be displayed:



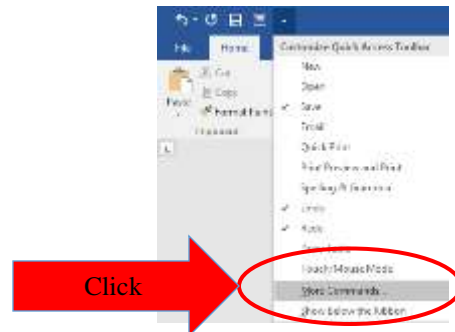
7. Copy or Type the following text into the macro as show above:  
ActiveDocument.AttachedTemplate = "YOUR FILE LOCATION" & "OAH Agency Rules Template.dotm"  
Replace YOUR FILE LOCATION with the file location where you stored the template. For example,  
**S:\Template\**  
You must have a backslash at 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:

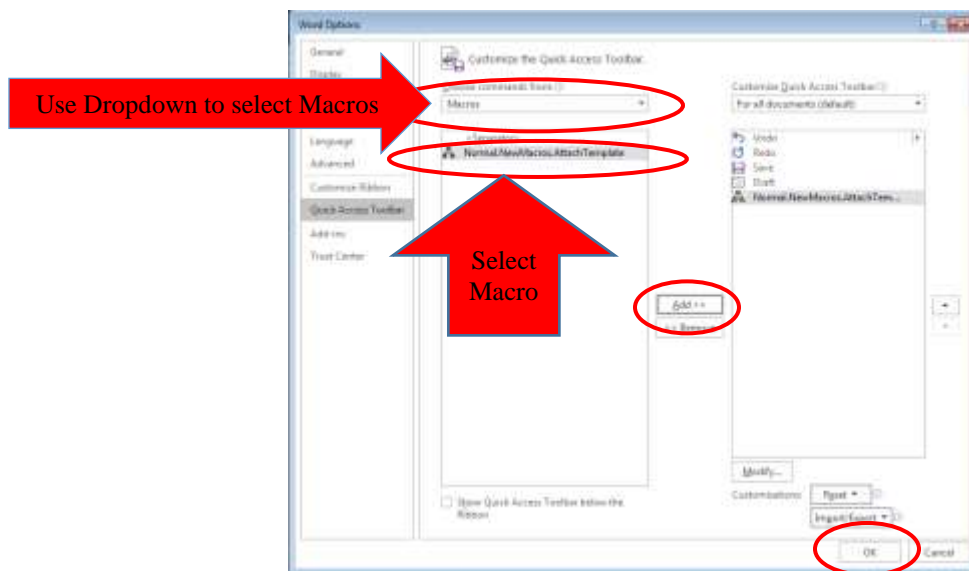


10. The Customize Quick Access Toolbar menu will be displayed. Click More Commands.



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.

