

CHAPTER 2-1 TECHNICAL HANDBOOK IMPLEMENTATION

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**2-1.1 Purpose**

The Office of Environmental Health and Engineering (OEHE), Indian Health Service (IHS), routinely develops guidelines and procedures related to various environmental health and engineering topics. These guidelines are compiled and posted on the OEHE Technical Handbook website at <http://www.oehe.ihs.gov/hb/index.cfm>. This chapter provides information regarding formatting of the Handbook and organization, development, and maintenance of the Website.

**2-1.2 Scope Of The Technical Handbook**

The OEHE Technical Handbook is a guidance document meant to support or implement IHS policy. It consists of a series of "volumes." Each volume deals with a specific OEHE program function. The volumes are as follows:

- A. Volume I - Administration provides information concerning OEHE organization, mission, goals and objectives, and other general environmental health and engineering activities.
- B. Volume II - Health Care Facilities Planning provides information and guidance concerning requirements for validation of workload, justification of program needs, project prioritization, space planning criteria, staffing, operating costs, site selection, land acquisition, and other information necessary for the approval of health care facilities construction and for development of cost estimates for inclusion in IHS budget requests.
- C. Volume III - Health Care Facilities Design and Construction provides guidance and procedures for the design and construction of health care facilities and quarters. Included are requirements for feasibility studies, conceptual designs, preliminary designs, drawings and specifications, and to secure architect/engineer services.

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- D. Volume IV - Real Property Management provides information and guidance on procedures to direct, coordinate, and evaluate realty programs. This includes accountability activities for federally owned real property and IHS direct leased space. It also discusses workplace management and provides technical interpretation of the laws, regulations, policies, procedures, and practices governing the realty program.
- E. Volume V - Clinical Engineering provides procedures and practices in the application of clinical engineering technology to support direct patient care. It addresses the requirements for clinical equipment inspections, tests, calibrations, repairs, hazard/recall/alert notification, preventive maintenance, and electrical safety. It also discusses user training for the safe use and application of medical devices, and the selection and evaluation process for purchasing clinical equipment.
- F. Volume VI - Facilities Engineering provides procedures, practices, and technical requirements to follow in planning, coordinating, and implementing day to day operations of facilities maintenance and repair programs. Topics include heating, ventilation, preventive maintenance, energy conservation, repairs and improvements to real property and non-clinical personal property, and operation of steam, air conditioning, water, and sewage plan.
- G. Volume VII - Environmental Engineering provides procedures, practices, and technical requirements for planning, design and construction of sanitation facilities.
- H. Volume VIII - Environmental Health provides procedures, practices, and processes for planning and implementing a comprehensive community-based environmental health services program.
- I. Volume IX - Contracting provides procedures, practices, and processes for contract management.
- J. Volume X Engineering Services provides procedures, processes and practices for the engineering services offices.

Within each volume, related "parts" are grouped into appropriate subject categories. Chapters are used to further subdivide parts into related topics. Generally documents are posted on the Technical Handbook Website by chapter. However, it is also possible to post portions of chapters as separate documents.

### **2-1.3 Processing Documents for the Technical Handbook**

#### A. Writing

The originating OEHE Division is responsible for the preparation of handbook documents, including supplements. Division Directors are responsible for assuring that the final version of a handbook document accurately and clearly reflect IHS purpose, objectives, and intent.

#### B. Review

The Technical Handbook review process should ensure that the published document is technically accurate and that it is clearly and concisely written. Documents should also be consistent with all other documents in the Technical Handbook. Primary responsibility for the review rests with the originating division. However, a complete review should include:

- Other OEHE Divisions that might be affected by the document,
- The technical handbook manager
- Office of the Director, Office of Environmental Health and Engineering, and
- Other IHS staff with technical expertise.

#### C. Approval

Document approval authority rests with the Director, OEHE<sup>1</sup>.

The technical handbook manager is responsible for preparing the final document for approval, tracking the approval review process, posting approved documents to the Technical Handbook and for notifying subscribers of all postings. This responsibility includes preparing an Issuance Notice, for approval. The technical handbook manager is also responsible for ensuring the editorial consistency of the Technical Handbook. The technical handbook manager also maintains one printed copy of Technical Handbook Issuances, including the Notices, and keeps a record of all Issuance Notices.

#### D. Issuance Notices

An Issuance Notice is a document that records any action that changes the Technical Handbook website. It consists of a statement of the action that changes the Technical Handbook (e.g., This is to issue . . . ); a brief description of the purpose of the change (e.g., This chapter provides guidance on . . . ); a dated signature block, and description of the

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<sup>1</sup> In 2006, the Director, OEHE, assigned approval authority to the Division Directors. One Director issued a chapter, but needs the concurrence of the Director of other affected programs.

action to be taken to change the Technical Handbook. Most of the time the description of action to be take consists of a list of material issued and a list of material superseded. Figure 1, "Example of an Issuance Notice," on page 8 of 8 illustrates a standard Issuance Notice. Each Issuance Notice is identified by a unique 3 digit number, called the Issuance Notice Number.

#### **2-1.4 Processing Revisions to Approved and Posted Documents**

There are two types of revisions to an approved portion of the Technical Handbook:

- Clarifications or edits that do not change guidance and
- Revisions that reflect changes to policy, law, and/or regulation.

Clarifications or edits that do not change the guidance may be posted as soon as the need is recognized. In most cases, modifications to posted documents do not require the full approval process; however, the Technical Handbook manager may require that Division Directors with interest in the affected chapters provide written concurrence for the change. Other revisions to posted documents may require more extensive review.

Regardless of the reason for revising the Technical Handbook, a notice should be posted on the website in place of the existing chapter, as soon as the need for revision is identified. This notice can take many forms, including:

- A complete reposting of the affected documents with changes implemented;
- "Pen and ink" edits on the existing document;
- A comment on the existing document that states the need for revision; and/or
- An addendum to the existing document that provides additional or supplemental information.

The writing, review, approval and posting process for revisions to the Technical Handbook is as described above in Section 2-1.3, "Processing Documents for the Technical Handbook."

### **2-1.5 Posting of Documents**

After a document or a revision is approved, it will be posted to the Technical Handbook on the IHS/OEHE website at <http://www.oehe.ihs.gov/hb/index.cfm>. Subscribers to the Technical Handbook will receive notice of all postings via email.

### **2-1.6 Notification and Distribution**

Individuals wishing to receive notice of postings the Handbook or receive news related to the Handbook may add their email address to the Handbook subscriber list as follows:

- Using a web browser, access the Handbook website:  
<http://www.oehe.ihs.gov/hb/index.cfm>
- Click "Subscriber List." (In the sidebar menu on the left side of the screen)
- Complete the form provided, and
- Click "Subscribe."

Documents on the Technical Handbook website may be printed and compiled in a hardcopy book. However, the site will periodically be updated, and users should be aware that printed materials should be updated to reflect the latest on-line information. If two versions of a guidance are in conflict, the document posted at <http://www.oehe.ihs.gov/hb/index.cfm> takes precedence.

### **2-1.7 Handbook Format**

The format of this Document (Chapter 2-1) illustrates the format to be used throughout the Handbook. This format is consistent with the capability of popular microcomputer word processing programs, e.g., Microsoft Word and Corel WordPerfect.

- A. Referencing System - The referencing system used for the handbook (as illustrated in this issuance) is identified by numeric and alpha designations in the following declension and format:

Volume I  
Part 1-  
Chapter 1.  
Section 1.  
Subdivision A.  
Subdivision (a)

Each document Section numbering includes the part, chapter, and section number with the part and chapter number separated by a dash (-) and the chapter and section number separated by a period(.). Thus this section is identified as "2-1.7," which refers to Part 2, Chapter 1, Section 7. Indenting of paragraphs and Sections is not defined; however, most lines should contain between approximately 40 and 65 characters.

"Bullets" are used for lists of related information where each item in the list is reasonably concise without lengthy

explanation, and where no sequence or priority order is required for the bulleted items. Bullets may be used at any subdivision level in the document, i.e., a bullet list may be used for the section level or for any subsequent subdivision level.

- B. Consistency with Print Format - Although Technical Handbook documents are designed primarily to be posted on the Internet using the Adobe Acrobat PDF format, it is expected that some users will want to keep a printed version. Therefore, all documents will be prepared as if to be printed in hard copy.
1. Page Size - Documents should be prepared to print on the standard paper size of 8-1/2 inches by 11 inches. The orientation of the printed text on the page will normally be portrait mode. Landscape mode may be required for some charts and illustrations.
  2. Margins - The default of all margins is one inch. Other settings can be used for figures, tables, and exhibits if required for data to fit on a page.
  3. The top and bottom margins are set at one-half inch. Because a portion of each page is occupied by the header and footer, the distance available for actual text is about 8-1/2 inches.
  4. Page Numbering - Pages for each document will be numbered consecutively. If a section of a chapter is posted separately from the chapter the section number is included as part of the page number.

The page number for posted chapters will include the part, chapter, page number, and the total number of pages in a document, with the part and chapter number enclosed by parenthesis ( ) and separated by a dash (-). The page number for sections of chapters posted separately will include the part, chapter, section, page number, and the total number of pages in a document, with the section number inside the parenthesis and separated from the chapter number by a period. For example, this page in Chapter 1 of Part 2 is written as (2-1) 6 of 8. If this section (7) were published separately, an example of how the page number should be written is (2-1.7) 6 of 8. Page numbers are centered at the bottom of the page.

5. Headers - Headers are provided as shown in this document. The first header line is the title of the handbook, i.e., "Office of Environmental Health and Engineering Technical Handbook." The second line of the header contains "Indian Health Service". The third line is the volume number and volume title, and the fourth line is blank, while the fifth

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line contains the chapter number (including part number) and title (i.e., "2-1, Technical Handbook Implementation").

6. Footer - The footer contains the date of the issuance (left justified) and the page number (centered) and the Issuance Number (right justified).
- C. Table of Contents - Most documents with complex outline structures should have a table of contents that lists each major heading and the page number on which it appears. This should appear on the first page of the document directly under the header information. Some very short documents (less than 3 or 4 pages) may not require a table of contents.
- D. Figures, Tables, and Exhibits - Figures, tables, and exhibits present information directly related to the text in a graphical and/or tabular format. They could also be examples used to illustrate or support what is described in the main document. When reasonable, these are inserted into the document as close as possible to the pertinent text. When the data is extremely lengthy, i.e., a model document or a series of tables, it should be located at the end of the appropriate chapter. Every document containing Figures, Tables, Exhibits, etc., should include a table listing them immediately following the Table of Contents.
- E. Other Settings
- ! Left justification only.
  - ! Widow/orphan protection is active.
  - ! Line spacing is one.
  - ! Tabs are set at 2 inch intervals.
  - ! Initial base font is 11 point Courier.

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Figure 1, Example of an Issuance Notice

ISSUANCE NOTICE ISSUANCE - 111

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BACKGROUND:

This is to issue Technical Handbook for Environmental Health and Engineering" Volume \_\_\_\_, Part \_\_\_\_, Chapter \_\_\_\_, [Section \_\_\_\_], "[NAME OF DOCUMENT ISSUED]" which will be available at <http://www.oehe.ihs.gov/hb/>. This [Chapter/Section]\_ [Brief Description of the issued material].

\_\_\_\_\_  
Date [Division Director's Name]  
Director, [Division]  
Office of Environmental Health and Engineering

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MATERIAL ISSUED

1. Volume \_\_\_\_, Part \_\_\_\_, Chapter \_\_\_\_

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MATERIAL SUPERSEDED

2. Volume \_\_\_\_, Part \_\_\_\_, Chapter \_\_\_\_

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Material Issued will be placed, as an Adobe Acrobat file, on the Technical Handbook Website (<http://www.oehe.ihs.gov/hb/index.cfm>) where it will be available for viewing or printing.

September 06