
TITLE 120 – Administrative Services

Part 303 – Using the Directives Management Tool

Subpart A – NRCS Users

303.0 Purpose

This national instruction provides guidance to NRCS users of the Directives Management Tool (DMT) for publishing directives after all requisite approvals have been obtained in Smartsheet in accordance with 120 M Part 503.

303.1 References

- A. Title 120 General Manual Part 403, Subpart A “Directives”
- B. Title 120 Manual Part 503, “NRCS Directives Management”
- C. [FPAC-N MSD-001 - Directives Management Tool \(DMT\) Implementation](#)
- D. [FPAC Business Services - Directives Management Tool Training and Support \(servicenowservices.com\)](#)

303.2 Background

DMT was developed by the Farm Production and Conservation (FPAC) Business Center to facilitate drafting, clearing, and publishing all directives for the FPAC Mission Area. Concurrent to developing DMT, NRCS developed Smartsheet as a platform for capturing leadership approval on a broad range of documents requiring approval of senior leadership. This directive is intended to provide detailed instructions on the manual interface between these two platforms for NRCS staff.

303.3 Procedures – NRCS Directives

- A. To begin, access DMT at: [Directives Management Tool | ServiceNow \(servicenowservices.com\)](#). This link opens the catalog in DMT.
- B. The catalog page provides two options:
 - 1. General Request. Choose this option to cancel an existing directive.
 - 2. Create a new Directive. Choose this option to publish a new directive or amend an existing directive.
- C. To cancel an existing directive:
 - 1. Select “General Request.”
 - 2. In the text box provided, describe the request as the cancellation of the directive, using the title, type, part, subpart, and name of the directive as appropriate.
 - 3. Select the attachment (paperclip) button at the top right of the screen. This will open the Attachments dialog box. Select the “Choose file” button. That will open File Explorer in a separate window. Select the signed ADS-017 and any appropriate

supplementary documentation, then select “Open.” The selected file(s) will display in the Attachments dialog box. Once done, select the X at the top right-hand corner of the Attachment dialog box. The files will appear at the top left next to “Manage Attachments.”

4. Click “Submit.” A new page will open with the request details. No action is needed on this page, select “Update” to return to the main catalog page.
 5. The Management Services Division, Directives, Forms, and Records Management Branch (DFRMB) directives team will communicate using the email function through DMT. Follow the directions in those email messages and work with the directives team to ensure that the cancellation process is complete.
- D. To publish or amend NRCS directives:
1. Select “Create a new Directive.”
Note: The originator of a directive in DMT should be the subject matter expert responsible for drafting the directive and moving it through the clearance and publication processes. If that is not the case, please adjust the procedures below accordingly.
 2. On the intake page, the first four fields should automatically populate (verify that all fields are correct). In the “Directive Type” field, select the appropriate directive type on the drop-down menu and select “Submit.”
 3. On the next page, enter the directive title in the “Directive Title” field on the right. Select “Save” at the top right.
 4. On the bottom left of the screen locate the three tabs marked “Collaborators,” “Concurrence,” and “Clearance.”
 5. Select the “Concurrence” tab.
 6. Select “New.” On the next page, enter the originator’s name in the “Concurrence POC” field. Select the appropriate office. Select “Submit.”
 7. Select the “Clearance” tab.
 8. Select “New.” On the next page, enter the originator’s name in the “Clearance POC” field. Select the appropriate office on the drop-down menu. Select “Clearance Role” and select “Final Signature Authority” on the drop-down menu.”
 9. If it is appropriate for a second person to review the directive in the clearance stage (such as a division director), repeat step 8 for that person, and select “Signer” on the drop-down menu as the “Clearance Role.” Select “Submit.”
 10. In the upper right of the screen, select “Move to Drafting and Concurrence.” This will generate a dialog box. Select “OK.”
 11. In the “Audience” drop-down menu, select “Outside FPAC.”
 12. Enter an appropriate narrative in the “Description and Background” text box.
 13. Below the blue SharePoint link, there are three tabs labeled “Executive Summary,” “Process Tracking Dates,” and “Work Notes and Comments.” Select “Executive Summary.”
 14. Enter an appropriate narrative in the “Description and Background” text box. This may be the same narrative as in step 12.

15. In the “Issues to Raise to the Approving Official” text box identify any issues that need to be raised to the approving official. If there are none, or if this directive has already been approved in Smartsheet, enter “N/A.”
16. Save these updates by selecting “Save” at the top right of the screen.
17. In the middle of the screen on the left, there is a blue SharePoint link. Select this link to begin drafting or to upload an existing directive. In a new browser tab, the SharePoint library will open with the file of the template for the directive type selected in step 2.
18. If the directive is already drafted, the template may be deleted. Otherwise, use this template to create the draft.
19. If DMT is being used to facilitate drafting the directive, go back to the browser tab that contains the ticket and select “Collaborators.” Otherwise, skip to step 23.
20. Using the “New” button, add, one at a time, as many collaborators as needed. Collaborators may be assigned either the reader or writer role. Writers will have access to edit and comment on any document uploaded to the SharePoint library. Regardless of the role assigned, the originator has sole discretion to move the directive out of Drafting and Concurrence, which will lock out further changes in SharePoint.
21. At this point, the originator may work with collaborators to draft and develop the directive until it is ready for NRCS clearance. The document in the SharePoint library may be used for that collaborative effort, but the originator has full discretion on how to accomplish this.
22. When drafting and collaboration in DMT is complete, submit the directive in Smartsheet for approval.
23. Upload a clean copy of each document (in .docx for word files) that has received clearance in Smartsheet (in accordance with 120 M Part 503 Subpart D) into the SharePoint library in the DMT (remembering to delete any prior version in that location).
24. Select “Initiate Concurrence Approval” at the top right of the page. Select “OK” in the dialog box. This will generate an automated email requesting concurrence approval to the individuals listed on the concurrence tab, which should only be the originator if all steps were followed above.
25. In DMT, select “Concurrence Approval” or, from the automated email, select “Approve” and select “OK.” The approver also has the option to review the directive by selecting “here” in the email and selecting the blue SharePoint link.
26. When concurrence approvals are complete in DMT, select “Send to Directives Team” at the top right of the screen. This will generate a dialog box. Select “OK.” The originator is now finished with the submission in DMT until contacted by the DFRMB assignee.
27. The DFRMB assignee will review the directive and any associated files. If there are questions, the DFRMB assignee will reach out through DMT. Any communications in the “Work Notes and Comments” tab will generate automated emails between the originator and the DFRMB assignee.

28. Once the originator and the DFRMB assignee have completed addressing edits and comments, the DFRMB assignee will complete the editing and formatting phase and the directive is ready for the originator to send it to clearance.
29. To begin clearance, the originator will select “Send for Clearance” at the top right of the screen and select “OK.”
30. If there are signers on the clearance tab, an automated email is sent. In the email, select “here” to go to the approval page. From approval page, signers may access the directive and any supporting files using the blue SharePoint link.
Note: Do not select the approve or reject buttons in the email.
31. Once all signers have completed their review and approval (or if there are no signers), the originator works with the DFRMB assignee to address any questions about editing or formatting.
32. The DFRMB assignee will initiate final approval after confirming with the originator.
33. When final approval is initiated, DMT will send an automated email to the final signature authority. Select “Approve” in the email, or select “here” to go into the approval page. From here, final signature authority may access the directive and any supporting files using the blue SharePoint link.
34. When final signature approval is complete, the directive is automatically moved to DFRMB for publication. The DFRMB assignee will notify the originator to review the directive prior to publication and no further action is required by NRCS.

303.4 Procedures – FPAC Directives

- A. The FPAC Business Center originator sends FPAC directives applicable to NRCS through DMT for NRCS to review. The directive is accessed through a SharePoint link in DMT.
- B. Comment and Feedback
 1. The Management and Strategy (M&S) editor saves the draft to a OneDrive folder and distributes the link by email for reviewers to make their revisions and comments in the shared document.
 2. During the review period, the M&S editor consolidates the reviewers’ comments into the draft in DMT. As the DFRMB assignee responds to comments about formatting and style, the M&S editor copies and pastes those responses into the OneDrive draft for reviewers to consider DFRMB’s response.
 3. The M&S editor will ensure that FPAC Business Center processes and policies for updating the status of each FPAC directive is followed.
 4. The FPAC Business Center originator will edit the draft based on the comments and return it to the M&S editor for a second review.
 5. The M&S editor reviews the draft to see if all NRCS feedback has been addressed. If a comment does not appear to be addressed, the M&S editor contacts the NRCS reviewer to see if the issue needs to be pushed.
 6. When all NRCS feedback is addressed, the M&S editor contacts the FPAC Business Center originator through DMT to let them know NRCS has accepted the draft.
 7. The M&S editor then notifies the special assistant (chief of staff) for M&S of NRCS’s approval.
- C. Clearance

1. Once assured that all NRCS feedback has been addressed by the FPAC Business Center originator and the DFRMB assignee, the chief of staff for M&S generates a ticket in Smartsheet for approval using the following procedure:
 - a. Download a copy of the FPAC directive from DMT.
 - b. Open the following link: [Clearance Document Submission Form - Smartsheet.com \(smartsheetgov.com\)](https://smartsheet.com).
 - c. Scroll to the bottom of the page and select “Upload.”
 - d. Select the directive downloaded in paragraph (a).
 - e. Before selecting “Open,” copy the document name.
 - f. Select “Open.”
 - g. Scroll to the top of the page and paste the document name into the field “Document Name.”
 - h. For “Purpose of Submission,” type “NRCS approval for publication of FPAC Directive.”
 - i. Enter your email address.
 - j. Under “Point of Contact Deputy Area/Office Affiliated,” select “Management and Strategy (M&S).”
 - k. Under “Document Type,” select “Directive.” Selecting “Directive in this step is essential to routing the directive correctly.
 - l. Under “Division to Approve,” select “Policy and Program Analysis Division.”
 - m. Under “Clearance Needed,” select “Deputy Chief.”
 - n. Leave “CPS Practice Code” blank.
 - o. Select “No” for “Other Impacted Organizational Units.”
 - p. Do not make any selections from the dropdown for “Provide the Deputy Area(s) Affected.”
 - q. Select an appropriate “Clearance Deadline.”
 - r. Select “Submit.”
2. Once approval is obtained from the deputy chief for M&S, the chief of staff will provide approval for clearance in DMT.

303.5 Responsibilities

A. Directive Originators

1. Leads the collaborative effort of drafting any new NRCS directive or amendment.
2. Fills out the ADS-017 for any NRCS directive cancellations.
3. Generates the ticket in Smartsheet for NRCS approvals.
4. Ushers the Smartsheet ticket to completion.
5. Creates the ticket in DMT for cancellation or publication.
6. Identifies collaborators, concurrence, and clearance POCs in DMT.
7. Ushers the DMT ticket to completion.

B. M&S Editor

1. Edits all NRCS directives that come through Smartsheet for approval.
2. Routes FPAC directives for comment and feedback.
3. Returns NRCS feedback on FPAC directives to FPAC.
4. Notifies M&S chief of staff when FPAC has addressed all comments and feedback on FPAC directives.

C. M&S Chief of Staff

1. Generates Smartsheet tickets for deputy chief approval of FPAC directives.
2. Ushers FPAC directives Smartsheet tickets to completion.
3. Provides clearance on behalf of NRCS in DMT for FPAC directives.