OKLAHOMA

OKLAHOMA SECRETARY OF STATE

Guidance Document Application

Agency Registration and Submission Manual

An overview of the agency features of the Guidance Document Application, including how to request access, file, amend, and rescind guidance documents

BRIDGE

For the staff of Oklahoma state agencies that file guidance with the Secretary of State

By Bridge Enterprise Solutions, LLC (BridgeRM) for the Office of the Secretary of State · Statewide Contract SW1050

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Contents

Overview 3
1. Account Management 3
2. The Document Lifecycle 4
3. Publishing Queue 6
3. Filing a New Document 6
5. Amending a Document 7
6. Rescinding a Document 8
8. Support and Troubleshooting 8

Overview

This manual provides guidance for agency personnel responsible for submitting, amending, and rescinding guidance documents.

The Agency Dashboard includes the following pages and abilities:

1. Overview: Displays a summary of the agency's documents.
2. Add New Guidance: Opens the form to file a new guidance document.
3. Publishing Queue: Displays filings that are not yet public, organized into the Drafts, Submitted, Corrections, and Denials tabs.
4. Guidance Documents: Displays the agency's published documents, with Amend and Rescind actions for each active document.

Site Directory:

Site	Address	Users	Purpose
Public site	guidance.sos.ok.gov	Public	The public searches, reads, and downloads published documents.
Agency site	agency.guidance.sos.ok.gov	Agency and admin	Agency users request access, sign in, and file documents.

Note: Training materials and instructional videos are available on the public Help page. The Secretary of State's Office reviews all submissions and must approve them before publishing them on the public website.

1. Account Management

Requesting Access: Users must obtain approval from the Secretary of State's Office before accessing the application. Approved requests receive an invitation email that remains valid for seven (7) days.

1. Open the public site and select Agency Login.
2. Select Request Access.
3. Enter the following information:

a. First and last name
b. Email address used for the State's Microsoft 365 system
c. Agency
d. Reason for the request
e. Select Send Request.

Note: If an invitation expires before account registration is completed, contact the Secretary of State's Office to request a new invitation.

Creating an Account:

1. Open the link in the invitation email or navigate to the sign-in page on the agency site and create a new account.
2. Use the email address associated with the invitation.
3. Enter the one-time code sent by email.
4. Create a password.

Multiple Agency Access: Users who submit guidance documents for more than one agency can change agencies with the Switch Agency link at the top of the dashboard.

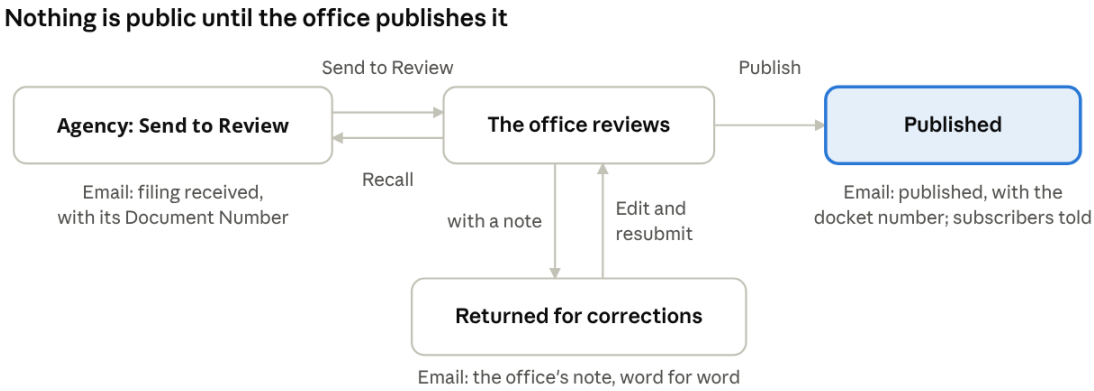
Multi-Factor Authentication (MFA): Microsoft manages all user authentication through its identity platform. Multi-factor authentication (MFA) is required for all user accounts.

Password Management: The Secretary of State's office cannot view, reset, or modify user passwords. Users must use the Forgot Password option on the sign-in page to reset their password.

2. The Document Lifecycle

Every document progresses through a defined lifecycle from creation to publication. Agency users create, update, and submit documents. Administrative staff review and process the

submissions.



What happens after Send to Review: review, return, publish

Document Identification and Tracking: A permanent docket number is assigned when a document is published. Until publication occurs, the document is tracked using a temporary Document Number that is visible only to authenticated users.

Certifications: Each filing action requires one or more certifications. Certifications serve as the agency's formal acknowledgment that the submitted information is accurate and authorized.

Filing	Required Certification
New document	The information is accurate and complete, and the PDF is the final, agency-approved version.
Amendment	The information is accurate and complete, the PDF is the final, agency-approved version, and the earlier version remains on the public record.
Rescission	The filer is authorized to submit the rescission, the agency intends to rescind the guidance on the date given, and the rescinded document remains public for historical reference.

Note: If a certification is wrongly checked, recall the filing or contact the Secretary of State's Office for assistance.

3. Publishing Queue

The agency can submit documents through the system via the publishing queue, which includes the following tabs:

1. Draft: Displays filings that have been created but not yet submitted for review.
2. Submitted: Displays filings that have been submitted and are awaiting review.
3. Corrections: Displays filings that were returned for revision and require additional updates before resubmission.
4. Denials: Displays filings that were denied and are no longer eligible for publication.

Task	Location	Action
Save unfinished work	Filing form	Select Save as Draft.
Reopen a draft	Drafts tab	Select the draft's title.
Delete a draft	Open draft	Select Delete Draft. This action cannot be undone.
Take back a filing in review	Submitted tab	Select Recall. The filing returns to Drafts.
Correct a returned filing	Corrections tab	Read the note, make the correction, and select Send to Review.

3. Filing a New Document

To file a new guidance document:

1. Select Add New Guidance.
2. Complete the fields listed below.
3. Attach the signed PDF.
4. Check each certification.
5. Select one of the following actions:
    a. Save as Draft: Saves the filing to finish later.
    b. Send to Review: Submits the filing to the Secretary of State's office.

i. After submission, the filing appears in the Submitted tab of the Publishing Queue, and a confirmation email is sent to the submitter and agency contact.

Note: To correct a mistake while the filing is in review, select Recall on the Submitted tab. The filing returns to Drafts.

Field	What to Enter
Title	The title exactly as it appears on the PDF.
Summary / Description	A plain-language description of what the document does.
Form of Guidance	The type of document, such as a memorandum, notice, bulletin, directive, letter, no-action letter, policy statement, or interpretation.
Keywords or Topics	Words the public might search for.
Quarter	The filing quarter. This field is required before the filing can be sent for review.
Date Issued	The date the agency issued the document. This field is required before the filing can be sent for review.
PDF	The signed, final version. The file must be smaller than 50 MB.

5. Amending a Document

An amendment creates a new version of a published document. The previously published version remains part of the public record and is marked as Superseded. Only one amendment or rescission may be in progress at a time. Additional changes cannot be initiated until the open filing is completed or deleted.

Submitting an Amendment:

1. Navigate to the Guidance Documents page.
2. Locate the document and select Amend.
3. Update the filing information as needed.
4. Enter the reason for the amendment and a summary of the changes.

5. Upload the revised signed PDF.
6. Complete the required certifications.
7. Select Send to Review.

Note: A typo in a published title or summary does not require an amendment. Contact the Secretary of State's office to correct it.

6. Rescinding a Document

A rescission withdraws a published guidance document. The document remains part of the public record and is marked as Rescinded once the rescission is approved and published.

Submitting a Rescission:

1. Navigate to the Guidance Documents page.
2. Locate the document and select Rescind.
3. Enter the effective date and the reason for the rescission.
4. Identify replacement or related guidance.
5. Complete the certifications.
6. Submit Rescission.

Note: The rescinded document stays Active until the office publishes the rescission.

8. Support and Troubleshooting

Contacting Support: Send questions about what to file and site problems to the Secretary of State's office.

Common Issues:

Issue	Recommended Action
Invitation email not received	Check the spam folder, then ask the Secretary of State's office to resend the invitation.
Sign-in refused	The invitation may have expired, or the email address may not match the one on file. Contact the Secretary of State's office.
Sign-in code not received	Wait one minute, check the spam folder, and request a new code.

Issue	Recommended Action
PDF upload fails	Verify the file is a PDF smaller than 50 MB. If the virus scan rejected the file, export a clean copy and try again.
Send to Review does nothing	Look for a message next to any empty required field, such as Quarter or Date Issued.
Filing returned	Read the note on the Corrections tab.
Typo on a published page	Contact the Secretary of State's office to correct it. An incorrect PDF requires an amendment.
Amend or Rescind button missing	Another change is already open on the document, or the document is not Active.
Agency not listed	Select Switch Agency at the top of the dashboard, or ask the Secretary of State's office to add the agency.
User leaving the agency	Notify the Secretary of State's office so they can remove the user's access.