

1.420 FORMS MANAGEMENT PROGRAM

- A. The university has a forms management program consistent with SG 10-604 through 10-608. The program requires all university forms to be approved by a forms management officer and maintained in a central listing and repository.
- B. The forms management officer reviews, approves, and reports on forms created by or for departments and operations administered by the university in order to avoid redundancy and assure that forms are relevant for their designed purposes.
 1. For the purposes of the university's forms management program, forms are documents with standard formats for the systematic and repetitive collection, maintenance, or transmission of information.
 2. According to the university forms management officer, forms are not:
 - a. Work sheets and other documents used exclusively by the entity of origin which, when completed, are not retained for purpose of audit;
 - b. Forms created by other entities, e.g., federal, state, county, municipal, etc.;
 - c. One-time forms for specific projects;
 - d. Form letters or memoranda;
 - e. Letterhead, envelopes, labels, tags, tab cards;
 - f. Licenses, certificates, diplomas;
 - g. Brochures, maps, charts, manuals, booklets, pamphlets, posters;
 - h. ID cards, passes, permits;
 - i. Tests, examinations, quizzes; and
 - j. Menus or announcements.
- C. The chief will designate an employee to serve as the official liaison to the university's forms management officer.
- D. The chief will designate an employee to coordinate the agency's internal form development and revision process.
 1. Requests for new or revised forms will be submitted to the agency's form manager for evaluation and action.
 2. Development and review of agency forms will involve those units or personnel who will use the forms.
 3. Internally developed forms must be reviewed by the Accreditation Manager to ensure forms comply with any applicable CALEA standards.
 4. Final approval by the chief or appropriate unit commanders is required before forms are implemented.
- E. New and revised agency forms coming under jurisdiction of the university's forms management program will be sent to the forms management officer for review.
 1. Forms will be accompanied by Form Information Sheets.
 2. Forms receiving university approval will be assigned form management numbers that are to be printed on versions of new and revised forms.
 3. The forms management officer must be notified by form management date and number when forms are discontinued or revised.
- F. Agency forms developed and revised in-house are saved in the Shared Drive Documents folder.
- G. Word processing file names of forms, university form management numbers, and revision dates will be printed at the lower left corners of forms as appropriate.
- H. Agency forms will be reviewed by the agency's form manager at least every three years in order to determine if agency forms are duplicative and if formats are consistent with records maintenance or data processing requirements.