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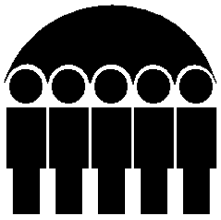
Management Manual
Title 20
Chapter C

FORMS MANAGEMENT APPENDIX



Iowa
Department
of
Human Services

Page

Blanket Mailing, 470-2543 1
Form Order Requisition, 470-0044 3
Form Register, 470-0153 4
Form Reprint Approval and Notification, 470-1908 6
Form Request and Specification, 470-0050 9
Form Request for Field Offices and Institutions, 470-2542 16
Requisition for Iowa State Industries Printing, Form 470-1623 19
Word Processing Request, Form 470-0051 22
Forms Analysis and Design Handbook, Comm. 203 24

Blanket Mailing, 470-2543

Purpose	The central office forms manager uses form 470-2543 to notify Iowa Prison Industries at Anamosa how many new or revised forms are to be distributed to each field office.
Source	The *Blanket Mailing* template is located in the administrative folder under State Approved Forms in Outlook.
Completion	The forms manager prepares the *Blanket Mailing* form: ♦ To distribute a new form to field offices. ♦ When a deadline must be met to get a revised form to the field staff because of changes in rules, and the form has been prepared too late to allow offices to order their own supplies before the beginning date the form is to be used.
Distribution	The forms manager e-mails form 470-2543 along with an electronic file of the new or revised form to Iowa Prison Industries at Anamosa.
Data	**Form number:** Enter the central file number or reference numbers (i.e. "RC" or "Comm.").
	Forms manager signature: The forms manager enters their name.
	Quantity: Enter the number of units to be distributed (for a **one-month** supply) to each office next to the county office's order number. The county order number is the four-digit code followed by a "0" for income maintenance and service offices or a "W" for child support recovery offices.
	County offices are divided into four classes: ♦ Very large (Polk) ♦ Large (Black Hawk, Dubuque, Linn, Pottawattamie, Scott, and Woodbury) ♦ Medium (Cerro Gordo, Clinton, Des Moines, Lee, Wapello, and Webster) ♦ Small (all other counties not listed above)

Child support recovery offices and regional targeted case management offices are also listed on the form so those offices can be included in a blanket mailing.

Form Order Requisition, 470-0044

Purpose	Designated staff in each county office use form 470-0044 to order forms from Iowa Prison Industries at Anamosa.
Source	Complete this form on line using the template available in the administrative folder under State Approved Forms on Outlook.
Completion	Complete the *Form Order Requisition* when you need to place an order for forms that are stocked by Iowa Prison Industries. **Note:** Iowa Prison Industries does not charge shipping on orders of $250 or more to one address. Remember, if a form you are ordering is on back order, it will not be included in your $250 order. The form will be shipped when printed with freight charges added. If your order is being shipped to various locations, each location would require a $250 or more order to get freight-free shipping.
Distribution	Designated staff completing this form shall follow the policy in their service area for ordering forms from Iowa Prison Industries.
Data	Designated staff complete: **County or Name:** Enter county or organization name. **Date:** Enter date you are placing an order. **Street:** Enter the county or organization's street address. **Order No:** Enter your order number. You may contact Iowa Prison Industries directly if you don't know your order number. **City & Zip:** Enter the city and zip code you want your order to be shipped. **Quantity:** Enter the quantity requested (e.g., 5 pads, 25 sets, 10 each) **Description:** Enter the name of the form. **Form No:** Enter the form number. This may be a seven-digit number or a "Comm." or "RC" number. **Ordered by:** Enter your name.

Form Register, 470-0153

Purpose	The *Form Register* is used to maintain a record of forms used by the Department of Human Services.
Source	This form can be photocopied from the paper manual or printed from the on-line manual as needed.
Completion	The Department forms manager maintains a register of every approved form together with the page reference from the Employees' Manual, Management Manual, or State Handbook of Procedures where the instructions for the form are found. Service area or institution form coordinators may use the form, if desired, to note the person or location responsible for the form.
Distribution	The original form is kept in the form register log either in central office, the service area, or at the institution.
Data	The forms manager enters the form number and name of the form when the form number is assigned. The date of the form and the page reference for instructions is entered after release of the material.

Form Number:

- **Current:** Enter the number assigned by the forms manager. Enter central file number in numerical order in the *Form Register*.
- **Obsolete:** If the form is renumbered, enter the obsolete number here. If several forms are being combined into one form, enter the number of each obsolete form.

Date of Form: Enter the revision date of the form.

Name of Form: Enter the title assigned to the form.

Manual: Check "yes" if the form is shown as a current form in the Employees' Manual, Management Manual, State Handbook of Procedure, or circular letter. Check "no" if the form is not in the manual.

Reference(s): Enter the title, chapter, and page number of the Employees' Manual, Management Manual, State Handbook of Procedures, or circular letter where the instructions for the form are given. If the form is not in the manual, enter the name of the form originator.

Void: Use this column when the current form number is declared superseded or obsolete:

- **Date:** Enter the date the form is declared void.
- **By:** Enter the number of the general letter or circular letter that lists the form as superseded or obsolete, or the name of the person obsoleting the form if the form is not in the manual.

Form Reprint Approval and Notification, 470-1908

Purpose

Form 470-1908, *Form Reprint Approval and Notification*, is used to:

- Determine whether forms stocked by Iowa Prison Industries at Anamosa need to be reprinted or revised.
- Notify Iowa Prison Industries if the form should be reprinted, the minimum quantity number should be changed, or the form should be obsolete.
- Record printing cost information or destruction fees charged by Iowa Prison Industries.

Source

Complete form 470-1908 on line using the template available in the administrative folder under State Approved Forms on Outlook.

Completion

The forms manager generates this form when a monthly printout is received from Iowa Prison Industries at Anamosa indicating that inventory has fallen below a predetermined "minimum quantity." "Minimum quantity" is based on an average two months' usage of the form.

The DHS forms manager sends the form to the program manager to determine whether the form should be reprinted and to see if revisions need to be made.

The forms manager includes the following information:

- Whether the form is on backorder
- When the form was reprinted last
- The quantity of the last reprint
- The cost of the last reprint
- Whether the form is available as a template on Outlook
- Any additional information that will help the program manager determine how to proceed with the form in question

If a form is available as a template, program managers must justify future printing of the form.

The program manager shall:

- Determine if a revision is currently needed or will be made within the next year.
- Discuss the form with other program managers whose programs also use the form or contact field counterparts to get the field's perspective, if needed.
- Indicate if a revision is expected in the next 12 months.
- Sign and date the form.
- Return the form the forms manager via e-mail.

If instructions are to reprint, the forms manager adds the amount to reprint, the minimum quantity, and any minor changes requested. The forms manager signs, dates, and e-mails the form to Iowa Prison Industries with instructions to reprint, change the minimum quantity amount, or obsolete the form.

Distribution

After form 470-1908 has been sent to Iowa Prison Industries, the forms manager saves an electronic version of the form until the following month.

If the form was printed, the forms manager enters the printing quantity and cost information from the monthly report onto form 470-1908, prints off a copy and files it in the form file.

If the form was obsolete or the request was to change the minimum quantity, the forms manager checks to see Iowa Prison Industries complied. If the obsolete form was removed from the inventory report or the minimum quantity was changed, the forms manager prints form 470-1908 and files it in the form file.

Data

The forms manager enters the central file number, which is a seven-digit number assigned by the forms manager to every form, or the form number, which is a number assigned for reference and communication material (RC and Comm.) and the title.

The program manager checks "yes" or "no" if a revision is planned in the next 12 months. If a revision is planned, the program manager enters the date the revision will be submitted to the forms manager.

Program managers enter their name and the date the form was completed.

Print Order

Before sending the form to Iowa Prison Industries, the forms manager enters:

- The number approved for Iowa Prison Industries to reprint.
- A two-month supply of the form or "minimum quantity."
- Comments for Iowa Prison Industries when reprinting the form.
- The forms manager name and date form 470-1908 was completed.

After the form is printed, the forms manager enters:

- The number of forms printed by Iowa Prison Industries.
- The date the form is printed by Iowa Prison Industries.
- The total cost for printing the job.

Change to Minimum

If the form is up for reprint, but the minimum quantity is set higher than a two-month supply, the forms manager can change the minimum quantity.

The forms manager enters the new minimum quantity amount, the manager's name, and the date completed, and e-mails the form to Iowa Prison Industries. The forms manager saves a copy of the form.

When the forms manager receives the monthly inventory reports issued by Iowa Prison Industries, the forms manager reviews the report to see if the minimum quantity was changed. If the minimum quantity was changed, the form is printed and filed in the forms file. If not, the forms manager contacts Iowa Prison Industries to find out why the minimum quantity was not reduced.

Obsolete Forms

If the form will no longer be available at Anamosa, the forms manager completes the form and enters the date in the **Obsolete On** field. The form is e-mailed to Iowa Prison Industries. The forms manager saves a copy of the form.

The following month, the forms manager determines if the form has been obsoleted. If so, the forms manager prints the form and files it in the forms file. If the form is still in inventory, the forms manager contacts Iowa Prison Industries to determine if there is a problem.

Form Request and Specification, 470-0050

Purpose

Central office form originators use form 470-0050 to:

- Request a form number;
- Request initial approval of a new or revised form;
- Request printing for central office forms; or
- Notify the forms manager that a form is being reinstated or discontinued.

Source

Complete this form on line using the template available in the administrative folder under State Approved Forms on Outlook.

Completion

The form originator, the forms manager, and the purchasing assistant in the Bureau of Purchasing, Payments and Receipts each complete a part of the form.

The form originator completes the form template when

- Requesting a new or revised form.
- Requesting a form number.
- Reinstating or discontinuing a form.
- Initiating a printing request.

This form must be completed even if the form is available in a template version or the form is system-generated.

Distribution

Upon completion, the form originator e-mails the form to the forms manager using the "send" button.

The forms manager completes the electronic request and e-mails the printing request to the printing coordinator using the "send" button on the form.

Once a month, the forms manager accesses a spreadsheet that is updated by the printing coordinator. The spreadsheet contains information on who printed the job, the quantity of the job, the date it was completed, and the cost of the job.

The forms manager transfers information from the spreadsheet onto form 470-0050 under the Support Services' Use Only section. Once the information has been transferred, the forms manager prints a copy of form 470-0050 and files in the form file.

Data

Form Title: For an existing form, enter the exact title. For a new form, consult the *Forms Analysis and Design Handbook* for instructions on how to title a form.

Date: Enter the date form 470-0050 is completed. For forms printed at Anamosa, this should be at least eight weeks before the date the form is needed.

Central File Number: This is a seven-digit number assigned by the forms manager to every form ("470" followed by a four-digit sequence number is used for forms originated in central office).

Requestor's Name: This is the name of the person requesting a new form number, a revision to an existing form, or requesting that a form be printed.

Unit: This is the requestor's unit, bureau, or division.

Telephone: This is the phone number of the requestor.

DHS Form Number: This is the number assigned by the forms manager to reference and communication material (RC and Comm.).

Check only one description of the action you are requesting:

- **New:** Check this if you are creating a new form.
- **Revised:** Check this if the form has a number and you are making changes to the form.
- **Consolidated:** Check this if you are combining two forms into one. Enter the form number you want to retain. Submit a separate request to discontinue the form you are deleting.
- **Reinstated:** Check this if form has been discontinued and you want to reinstate it.

- **Discontinued:** Check this if you want to obsolete a form that is no longer being used.
- **Printing Only:** Check this f you are requesting printing of forms that are used within central office.

Quantity Requested: When requesting printing of a new, revised, or unchanged form, enter the number of forms you want to have printed. The forms manager has final approval on this number.

If the form is only available electronically or is a system-generated form, you do not need to complete this section.

Cost Center: Enter the cost center the action is to be charged to. If the form is available electronically or is system-generated, you do not need to complete this section.

Date Needed: Enter the date you need your printed forms. If this form is available electronically or is system-generated, indicate the date the form is to be available to staff. Leave blank for discontinued forms.

Note: When requesting printing only, allow two weeks for forms printed on bond paper, four weeks for forms printed on NCR paper, and eight weeks for computer-generated forms. Allow four to six weeks for printing forms stocked at Anamosa.

Method of Completion: Check all that apply.

- **Hand:** Check if the form will be completed by hand.
- **Typewriter:** Check if the form will be completed by a typewriter.
- **Computer:** Check if the form will be completed electronically.

Rule Citation if Used by Public: Enter the administrative code citation for forms completed or signed by members of the public. Forms used by the public will not be printed until the rule is adopted.

DHS Manual Reference: Enter title and chapter reference for the form instructions from Employees' Manual, Management Manual, or State Handbook of Procedure.

Annual Usage: Enter the actual or estimated quantity used annually. For existing printed forms, this can be obtained from the forms manager's records. For new forms, it must be estimated based on the frequency of use and the number of cases or actions the form applies to. Accuracy is important to avoid over printing or under printing.

Frequency of Use: Describe how often the form is used in its routine application to a single person or case. For example, licenses are issued annually; payroll reports are used biweekly; leave slips are used occasionally.

Is Use Required: Check "yes" if usage of the form is required or "no" if it is not. If the consumer has to sign the form, the name and form number will have to be a part of the rules.

Seen by Public: Check "yes" if the form will be seen by the public or "no" if it will not.

Records Management Manual Reference: Enter the *RECORDS MANAGEMENT MANUAL* reference if the form is retained. Leave blank if the form is not retained.

The State Records Commission publishes its procedures and the retention schedule for all record series in the *RECORDS MANAGEMENT MANUAL*.

Retention Time: Enter the length of time the completed form is kept. If the form is not retained, enter zero.

Color of Paper: Enter the color of paper for forms printed on bond or cardstock. Standardized NCR colors are: white, yellow, pink, and gold. You may leave this section blank if the form is only available electronically.

The form footer should indicate where each color copy is to be sent or filed. For example: White: Central Office, Yellow: Client, Pink: Case file, Gold: Control.

If the form is not printed, the footer should still indicate how the form is to be distributed. However, instead of referencing copies by color, the footer would indicate copies by number. For example: Copy 1: Central Office, Copy 2: Client, Copy 3: Case File, Copy 4: Control.

Color of Ink: Enter the ink colors. You may leave this section blank if the form is only available electronically.

Paper: Check the applicable paper specifications. You may leave this section blank if the form is only available electronically or is system-generated.

NCR paper is self-carbon. You do not need to use a separate piece of carbon paper when printing on NCR paper. Enter the number of NCR pages needed. Refer to the *Forms Analysis and Design Handbook* for more information.

Size: Enter the size of what is to be printed. You may leave this section blank if the form is only available electronically.

Printing: Check the desired method of printing. Leave this section blank if the form is not being printed.

"Flipped" means printed page top to page top and should be used if forms are punched for filing at the side or filed loose. "Tumbled" means printed page top to page bottom and should be used if forms are punched for filing at the top.

Bindery: Check the applicable method of assembling and binding the forms. If you are unsure, refer to the *Forms Analysis and Design Handbook*. Leave this section blank if the form is not being printed.

Punching: If punching is desired, enter the number of holes to be punched, and where the holes should be located. Indicate the distance center to center of the holes, i.e. 4-1/4" for 3-ring binder, 2-3/4" for top ACCO fasteners. Leave this section blank if the form is not being printed.

It is possible to have one copy of a set punched to allow for filing and not the other. The copy of the form going to the public should not be punched.

Padding: If padding is desired, enter the number of sheets or unit sets per pad and check whether pads should be glued at the bottom, top, or left of the backing. (When usage by any one worker will be low, fan-apart sets are less costly.) Leave this section blank if the form is not being printed.

If possible, pads should be assembled in multiples of 25 with a maximum of 100 sheets per pad. For example, a three-part NCR form is padded with 25 sets (or 75 sheets) per pad. A two-part NCR form is padded with 25 sets (50 sheets).

Comments: Use this section to communicate any special needs or requirements, such as an initial mailing to every client, or a special arrangement for sharing the cost of a form. The forms manager needs to be able to anticipate unusual demands in usage, procedure, etc.

If you are requesting that the form become a template on Outlook indicate so here.

Requestor's Name: Enter your name.

Division Signoff: The division administrator or designee enters their name to approve requested action.

Disposition of Stock: If the form is printed at Anamosa, check whether the existing stock is to be used up before printing the revised version, or if the supply should be destroyed.

Leave this section blank if form is not being printed.

Blanket Distribution: Form 470-2543, *Blanket Mailing*, is completed by the forms manager. A maximum of one month's supply may be distributed to the field when a new form is printed.

This section will not be completed if the form is not being printed.

Forms Manager's Use

Comments: The forms manager uses this section to communicate any special needs or requirements when printing. Also, this space is used to indicate where the form is to be delivered, if it is printed.

Approved/Disapproved: Check the appropriate box if the action requested is approved or disapproved.

Quantity Approved: If the form is to be printed, enter the quantity approved.

Forms Manager's Name: Enter their name.

Date: Enter the date form 470-0050 is completed and approved or disapproved by the forms manager.

Support Services' Use Only

Quantity Ordered: If printed, the forms manager enters the quantity ordered.

Vendor: If printed, the forms manager enters the name of the vendor.

Requisition Number: If printed, the forms manager enters the requisition number assigned to the order.

Date Received: If printed, the forms manager enters the date the order was received.

Quantity Received: If printed, the forms manager enters the quantity printed by the vendor.

Cost: If printed, the forms manager enters the price it cost to have job printed.

Form Request for Field Offices and Institutions, 470-2542

Purpose

The form originator in a field office or institution uses form 470-2542 to:

- Request initial approval of a new, revised, or consolidated form.
- Notify the forms manager that a form is to be discontinued.

Source

Complete this form on line using the template located in the administrative folder under State Approved Forms on Outlook.

Completion

The form originator completes the template when the form originator:

- Has determined the need for a new or revised form and has completed an electronic draft of the form, or
- Has determined a form no longer needs to be used.

Distribution

Field Office Forms

If a local office has form changes, the form originator e-mails the template version of form 470-2542 and an electronic copy of the form being requested via the "send" button to the designated staff person in the service area for review.

The designated person shall share the requested changes with their counterparts statewide to get a statewide opinion on the changes. If approved, a designated staff person in the service area forwards both electronic forms to the forms manager for review and approval.

The forms manager will share the requested changes with the appropriate policy staff and the Unit of Quality Control, if applicable. If the policy staff are satisfied with the requested changes, the forms manager will return the approved form electronically to the designated staff person in the service area and the form originator.

Institution Forms

If an institution has form changes, the form originator or designated forms coordinator completes the form and forwards the form to the forms manager. The forms manager will update existing files or create new ones. The forms manager completes form 470-2542 and e-mails it back to the form originator.

Data

Staff from a field office or institution completes the following fields:

- **Location Unit:** Enter name of the institution or unit within the institution or the name of the service area or county office.
- **Form Originator:** Enter the form originator's name.
- **Date:** Enter the date the form is completed.
- **Central File Number:** Enter the seven-digit central file number of the form being requested. If you are requesting a new form, leave this section blank. The forms manager will complete it once a central file number has been assigned.
- **Form Coordinator:** Enter name of the forms coordinator for the institution or service area.
- **Telephone:** Enter the forms coordinator's telephone number.
- **Form Title:** Enter the title of the form. (Keep it as short as possible).
- **Agency Form Number:** Enter the agency's form number, if different than the central file number.
- **Annual Usage:** Enter the number of forms used yearly.
- **Seen by Public:** Check the applicable box to indicate if the form is seen by the public.
- **Retention Time:** Enter the length of time the form must be retained. Enter zero if it is not required that the form be retained.

Check only one of the following to indicate the appropriate action:

- **New:** Check this if you are creating a new form.
- **Revised:** Check this if the form has a form number and you are making changes to the form.
- **Consolidated:** Check this if you are combining two forms into one. Enter the number you want to keep. Submit a separate request to discontinue the form you are deleting.
- **Discontinued:** Check this if you want to obsolete a form that is no longer being used.

- **Records Management Manual Reference:** Enter the reference from the *RECORDS MANAGEMENT MANUAL* if the form is retained; leave blank if form is not being retained. See 20-C, ***FORMS MANAGEMENT***.
- **Paper Size:** Enter the size of paper. If the form size is 8½ x 11, enter "standard." Otherwise, enter the size of the paper the form is printed on.
- **Color:** Enter the color of the paper. If the form is to be printed on NCR paper, enter "multi."
- **Number of Pages:** Enter the number of pages of the form.
- **Number Sides Printed:** Enter "1" if printed on one side; or "2" if printed on both sides.
- **NCR:** Check "yes" or "no" to indicate that the form is printed on NCR paper.
- **Number of Copies:** Enter the number of carbonized copies. For example, you would enter three if your form contains a white copy, yellow copy, and a pink copy. This pertains only to forms printed on NCR paper.
- **Brief Description of Need:** Enter the form's purpose, the need for the form or why the form is being revised or discontinued.

The forms manager completes the following:

- Check the appropriate box indicating if the action requested on form 470-2542 is "approved" or "disapproved."
- **Forms Manager's Name:** Enter the name of the forms manager.
- **Date:** Enter the date form 470-2542 is completed.

Requisition for Iowa State Industries Printing, Form 470-1623

Purpose	The forms manager uses form 470-1623 to authorize printing of new or revised forms by Iowa Prison Industries in Anamosa.
Source	Form 470-1623 is a three-part NCR form that the forms manager keeps on hand.
Completion	Form 470-1623 is completed when new forms or revisions to existing forms need to be printed and will be stocked by Iowa Prison Industries. This form also supplies information on how the form should be printed and whether or not the form should be put into inventory at Iowa Prison Industries in Anamosa.
Distribution	The forms manager completes this form. The forms manager keeps the pink copy. The white and yellow copies are forwarded to Iowa Prison Industries to notify them of the quantity to print.
Data	**Date:** Enter the date of the printing request. **Order Number:** Enter the order number. This is a consecutive number used for tracking purposes by Iowa Prison Industries. **Description:** Enter the form name. **DHS Form Number:** Enter the seven-digit form number, Comm. number, or RC number. **ISI Form Number:** This section is left blank. **Number of Copies:** Enter the number of sets or pads to be printed. **Number of Plates:** Enter the number of pages of the form. **Sheets/Set:** Enter the number of sheets per set. A set is one form. It can contain one sheet/set or if it is printed on NCR paper, it may be four sheets to a set.

If printed both sides: Check the applicable box if the form should be "flipped," which means the form is double-sided and will be printed page top to page top. "Tumbled" is also double-sided but it is printed page top to page bottom. This may differ based on how the form is used and filed in a case file by field workers.

Cost Center Assigned: This section is left blank. The cost of printing is charged to whomever orders the form.

Quality: Enter the quality of the paper to be used when printing.

Size: Enter the size of the finished project.

Weight: Enter the weight of the paper to be used when printing.

Color: Indicate the color of the paper and color of the ink. If the form is printed on NCR paper, indicate that page 1 is white, page 2 is yellow, page 3 is pink, and page 4 is gold. If multiple colors of ink are used, be specific about which colors should be used.

Composing: Check the appropriate box to indicate if the job is for "new copy" or the form has been "revised."

Proof required: Check the applicable box, "yes" to indicate that a proof must be approved before the job is printed or "no" if no proof is required.

Bindery: Check the appropriate box:

- Collate: Check this box if the form will be printed on NCR paper or is more than one page.
- Tape: This option is not used.
- Spiral: This option is not used.

Staple: Check the appropriate box to indicate how many staples are needed per form or brochure. If no staples are needed, leave this section blank.

Padding: If required, check the appropriate box to indicate where the form should be glued together to make a pad. If a form will be glued into a pad, indicate by checking the appropriate box if a cardboard backing should be included.

If the form is padded, also indicate how many sheets or sets should be glued together to form the pad. Usually this is 25 sets/pad depending on the number of pages. Do not pad more than 100 pages together.

Punching: Indicate how many holes Iowa Prison Industries should punched in the form while printing it. Indicate if the holes should be punched at the top edge of the form or on the left side of the form.

Two holes is normal if punched on the top and three holes if punched on the left-hand side. Enter the distance from the center of one hole to the center of another hole. When punching holes on the top edge of the form, enter 2¾".

Perforation: Skip this section, as it is not applicable.

Folding: Check the applicable box to indicate how many times the form or brochure should be folded. If no folds are necessary, leave blank.

Keep in stock: Check this box if Iowa Prison Industries will be putting the form into inventory.

Disposition of Stock on Hand: Indicate if existing supply can be used or if it has to be destroyed.

Anticipated Annual Usage: Leave this section blank.

Quantity to Central Services: Enter the number of samples that the forms manager needs for the form file. Once printed, Iowa Prison Industries sends the copies to the forms manager.

Special Instructions: Indicate any special instructions that need to be conveyed to Iowa Prison Industries. This includes a note about the revision date of the form, the minimum quantity amount, when the electronic file was sent to Iowa Prison Industries, and any other pertinent information.

Date Wanted: Enter the date the printing is to be completed.

By: Enter the forms manager's name.

Word Processing Request, Form 470-0051

Purpose	Form 470-0051 is used by the forms manager when staff have requested that a new form be created or an existing form be revised. Form 470-0051 is used to notify staff in the central office word processing unit that a form needs to be created or revisions are needed on an existing form.
Source	Complete form 470-0051 on line using the template available in the administrative folder under State Approved Forms on Outlook.
Completion	The forms manager completes the top portion of the template when requesting changes to forms or manual. The central office word processing unit completes the bottom portion of the form as needed.
Distribution	When the forms manager completes the form, one copy is printed and paperclipped to the work that the Word Processing Unit will be processing.
Data	**Date In:** Enter the date the job is taken to central office's Word Processing Unit. **Date Requested:** Enter the date you request that the Word Processing Unit complete the job. **Rush:** Check the box if the job needs to be completed immediately. **Originator Name:** Enter the form manager's name. **Bureau:** Enter the bureau of the Department the forms manager works in. **Telephone:** Enter the forms manager's telephone number

Special Instructions: Check the appropriate box:

- **E-mail file:** Check this box to request Word Processing Unit staff to send a file electronically. Indicate the e-mail address of the person the file is to be sent to.
- **Print only:** Check this box to request Word Processing Unit staff to print pages that are not being revised. Word Processing Unit staff routinely print only the pages with revisions.

  If the entire file should be printed, check "entire file." If certain pages are to be printed, indicate the page numbers of the pages that should be printed.
- **Find and Replace With:** Indicate the words or phrases to search for and the text to replace the words or phrases. (Example: Search for "Department of Human Services" and replace with "DHS.")

Other: Indicate if there are any special instructions for word processing staff. Also indicate if any files are e-mailed to the Word Processing Unit.

Policy Analysis Use Only: Central office Word Processing Unit staff use the following fields to enter information for tracking purposes.

- Date completed
- Completed by
- File names
- New
- Revised
- Moved files or pages and the date completed
- Copied files or pages and the date completed
- Deleted files or pages and the date completed
- Printed
- Macros (number/pages)
- PDF links checked, files created, bookmarks created manually or with the plug-in, files inserted, and the date completed
- Files copied or deleted from Outlook, the folder name, and the date completed

Forms Analysis and Design Handbook, Comm. 203

Purpose	Comm. 203, *Forms Analysis and Design Handbook*, supplements material found in Management Manual 20-C. It gives instructions for analyzing forms and includes guidelines for designing forms.
Source	Separate supplies of the handbook are not printed. Consult the sample included in the on-line or printed manual.
Use	People designing new forms or evaluating the effectiveness of existing forms should consult this handbook.