

RECORDS AND FORMS MANAGEMENT 5.0

Forms Processing and Printing -- 5.4

Developing/Revising Public Health Forms -- 5.4.a

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POLICY

All forms* which are newly developed or revised for use by health department personnel must be approved by the Bureau Office and the Reduction in Paperwork, Records, and Forms Review Committee of the Department of Health.

APPLICABILITY

This policy applies to Regional and Central Office personnel.

PURPOSE

To monitor form development in an effort to minimize the number of forms used in health departments.

PROCEDURE

All forms must be approved and assigned a form number regardless of the quantity used.

All revisions to existing forms, as well as all new forms being proposed, shall be submitted to the Bureau Office designee for review and approval. A brief narrative of purpose and justification must be submitted with each proposal. The Bureau Office

designee will return the approved form to the initiating unit for further processing as outlined below.

If a new form is being developed, complete a **Forms Justification and Approval Request, GS-0540**, and a **Printing Requisition, GS-0132**. Submit these documents with two originals of the proposed form to the Bureau Office. Forms for distribution outside state government require a state seal.

If a form is being revised, attach two originals of the proposed revised form to a **Forms Justification and Approval Request, GS-0540**. Send these forms with a completed **Printing Requisition, GS-0132**, to the Bureau Office designee.

The Bureau Office designee will forward the proposed new form or the revised form to the Reduction in Paperwork, Records, and Forms Review Committee. This group meets the first Tuesday of every month. Program personnel may be asked to attend this meeting with the Bureau Office representative to justify/defend their form request.

If approved by the Reduction in Paperwork, Records, and Forms Review Committee, the form will be given to the Forms Officer of the Department of Health. A number will be assigned to the form and the original will be sent to state printing. Printing handled by state printing normally takes 30 working days; therefore, in order to expedite processing procedures, the request for new and/or revised forms should be sent well in advance of the time the form is to be used.

If the proposed form is to be piloted prior to official use, approval must be obtained from the Regional Director where the form will be piloted. Once approved by the Regional Director, the proposed pilot form and a completed **Forms Justification and Approval Request, GS-0540**, must be submitted to the Bureau Office designee. On block 10 (usage) of the GS-0540, it should be noted that this is a temporary use form. The Bureau Office designee will forward the form to the Reduction in Paperwork, Records, and Forms Review Committee which will review the form and forward it to the Forms Officer to obtain a number.

The program person submitting the pilot form will be notified of the number. This number **MUST** be typed on the bottom of the proposed form. The proposed form can then be copied and distributed for pilot testing. When sufficient information has been obtained from pilot testing, the form should be revised as needed and resubmitted to the Bureau Office. If the pilot form is being revised, attach two originals of the proposed revised form to a GS-0540. In all cases, a GS-0132 must be submitted with the proposed form.

The Bureau Office is responsible for updating forms in the Record Manual for Local Health Departments. Only forms received from the Bureau Office can be placed in the Record Manual for Local Health Departments.

NECESSARY FORMS

1. [Forms Justification and Approval Request, GS-0540](#)
2. [Printing Requisition, GS-0132](#)

REFERENCE DOCUMENTS

1. Record Manual for Local Health Departments
2. Records Management Manual

OFFICE OF PRIMARY RESPONSIBILITY

Office of the Director, Bureau of Health Services, (615)741-7305

*See [Policy 7.8](#) for information on authorization and printing of publications.