

Administrative Policy No. 11.02

Subject: Forms Management

Information Contact: DSHS Forms and Records Management Services
Office of the Secretary
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Authorizing Source: [Executive Order 05-03 Plain Talk](#)
[Contract 04218 Translation Services: Written Word](#)
Recommended Best Practices, Business Forms
Management Association (BFMA)

Effective Date: November 1, 1987

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Approved by: Original signed by Lori Melchiori
Senior Director, Office of Policy and Rules

Purpose

This policy sets requirements and guidelines for forms management in the Department of Social and Health Services, including:

1. Design, technical, and printing standards for DSHS forms.
2. The role of DSHS Forms and Records Management Services (FRMS).

Scope

This policy applies to all Department staff.

Definitions

Design standards: Principles of graphic design used to express and communicate information including effective page layout, use of logos, use of fonts, web page formatting, and printing requirements. For additional DSHS forms standards, see [Attachment A](#).

DSHS forms: Documents developed to collect or distribute information necessary for DSHS administrations, program management, and client services. This does not include forms exclusively connected to web applications or databases. Note: DSHS facilities that provide 24 hours, seven days a week care may create, maintain, and use local forms to meet their program needs; or may choose to use DSHS FRMS services for their forms needs.

DSHS printing standards: Production requirements of paper copies of DSHS forms, including print quantities, printing specifications, paper stock, etc.

Forms coordinator: The person appointed by division or administration management to oversee the development and maintenance of DSHS forms for their organization.

Forms repository: A network server where DSHS forms are stored and accessed.

Fulfillment center: A forms storage facility managed by the Department of Enterprise Services Print and Mail Services for high-use agency forms.

Intranet site: An internal DSHS website contained behind a firewall to prevent unauthorized access.

Internet site: A public website that anyone with a connection to the Worldwide Web can access.

Sunset review: Biennial program review of DSHS forms to obsolete unused forms and revise active forms that require revision.

Policy

1. To support quality care and services to clients served by agency administrations, Forms and Records Management Services (FRMS) must:
 - a. Provide standardized design and analysis of DSHS forms, including format, use, storage, and distribution of printed and electronic forms including translations. See [Attachment A](#).
 - b. Revise and modify existing DSHS forms according to the request of originating programs.
 - c. Maintain information about ownership, fiscal responsibility, and availability of DSHS forms.
 - d. Provide centralized ordering of DSHS forms.
 - e. Act as DSHS liaison to the Washington State Department of Enterprise Services Print and Mail Services for all DSHS forms stocked in the Fulfillment Center.
 - f. Supply current DSHS forms printing specifications, artwork, and related electronic files to the Department of Enterprise Services Print and Mail Services.

- g. Coordinate biennial sunset reviews to update or eliminate forms.
 - h. Post DSHS forms to the DSHS FRMS [Intranet](#) and [Internet](#) on program request.
 - i. Ensure the most current form revision is located in the DSHS forms repository.
 - j. Consult with and train DSHS staff to improve the quality and effectiveness of their forms.
 - k. Coordinate and work with DSHS program staff to identify and eliminate duplicate DSHS forms.
 - l. Supply DSHS forms templates for translation vendors on program request.
2. Division directors and equivalent or their designees must:
 - a. Establish internal procedures to notify field staff and other users regarding changes to office forms.
 - b. Appoint an employee as forms coordinator and notify FRMS in writing.
3. Forms Coordinators must:
 - a. Act as liaison between their division or administration, and FRMS.
 - b. Assist FRMS with the biennial sunset review process to ensure program forms are current.
4. DSHS employees must:
 - a. Contact FRMS to develop, revise, and order DSHS forms.
 - b. Use current and authorized DSHS forms available on the DSHS forms Intranet and Internet site.

Resources

[DSHS Intranet Forms Management Website](#)

Download DSHS forms: [DSHS Intranet Form Picker Website](#)
[DSHS Internet Forms Management Website](#)

Attachment A

A. **DSHS Logo**

Department forms must have the DSHS logo in the upper left corner of the first page. Other logos may appear; however, the top left is reserved for the DSHS logo.

B. **Titles**

All forms must have a unique title. Preferred placement is at the top of the form. Titles are 14-point bold in Arial, upper and lower case letters.

C. **Assigned numbers**

Each DSHS form must have a unique DSHS form number assigned by FRMS. A form number assists in requesting, stocking, issuing, and relating forms to specific procedural and legal requirements. Form numbers are placed in the lower left corner of each page in 8-point bold Arial font with the current revision date.

D. **Instructions**

Instructions must be available for all DSHS forms. Instructions may appear in the body of the form, in pages attached to the form, or in a procedures manual if the form applies to agency staff only.

E. **General forms design standards**

The following standards are required to comply with Executive Order 05-03 Plain Talk:

1. Minimum 10-point Arial for text.
2. Minimum 12-point Times New Roman for fill-in data.
3. A box format is recommended. This allows maximum use of space for fill-in.
4. Eight-point Arial in all capital letters for field names.
5. Number data items individually or by section to correspond with instructions.
6. Field sizes should be no less than .36 inches wide.
7. Use shading to separate or emphasize sections.
8. Allow a half-inch border around the form for printing.
9. Place distribution instructions at the bottom of the first page if applicable.

Note: Many languages require more space than English. The design and format of translated forms must allow sufficient space to meet these requirements.