

**Forest Service Handbook
National Headquarters - Washington Office
Washington, DC**

**Forest Service Handbook 1309.14 – Information Requirements Handbook
Chapter 10 - Forms**

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Date approved:

Responsible Staff:

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Digest: Following is an explanation of the changes throughout the directive by section.

Posting Notice. Amendments are numbered consecutively by Handbook number and calendar year. Post document in numerical order of chapters (1109.12, sec. 4.32, ex. 01). Remove entire national text of the Handbook and replace with this amendment. DO NOT REMOVE SUPPLEMENTS OR INTERIM DIRECTIVES. Retain this transmittal as the first page of this document.

Reorganizes the entire Handbook to consolidate direction by subject matter (forms, reports, data bases, and public information collection). Revises and clarifies direction throughout each chapter and adds codes for policy, responsibility, and specific subject areas.

10: Renames chapter title Forms. Consolidates direction on forms previously found in chapters 10 and 20. Updates the Service-wide forms listing in section 18.1 (formerly found in sec. 21) and incorporates direction from ID No. 90-1 on electronic forms and the National Forms Automailer.

20: Renames chapter title Reports. Consolidates direction on reports previously found in chapters 30 and 40. Updates the Service-wide reports listing in section 26.1 (formerly found in sec. 41).

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30: Renames chapter title Data Bases. Incorporates direction on data bases previously found in chapter 40. Updates the Service-wide data bases listing in section 39.1 (formerly found in sec. 42).

40: Renames chapter title Public Information Collections. Incorporates direction on public information collections previously found in chapters 10 and 30. Updates and clarifies direction on when approval is needed by the Office of Management and Budget (sec. 41).

This amendment is a reissuance of FSH 1309.14 to conform the format and structure of the Handbook to the requirements of electronic directive issuance.

This Handbook is now available electronically in the National Information Center in the same format as the paper copy. Henceforth, amendments to this Handbook will be issued to Forest Service units electronically on a document basis.

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10.4 - Responsibility

(FSM 1370.4 - 1370.44).

10.5 - Definitions

This section contains specialized terms, in alphabetical order, used throughout this chapter and their definitions.

Agriculture Department (AD) Form. A form prescribed by the Department of Agriculture for use throughout the Department.

Cut-Sheet Form. A single sheet form, 8-1/2 by 14 inches or smaller, with printing on one or both sides of the sheet.

Electronic Form. An arrangement of fixed data items that has been created on a computer and can be completed at the user terminal and transmitted electronically.

Forest Service (FS) Form. A form issued by the Washington Office Staff for Service-wide use.

Form. (FSM 1370.5).

Forms Analysis. The forms management function in which a form is reviewed to determine: (1) need for information; (2) whether information is collected through another form or data base; (3) the usefulness of the information; (4) an approach to gathering information while minimizing data collection error; (5) a way to enter information on the form in a convenient and economical sequence; (6) the best equipment and methods for performing the work; (7) the need for national information requirements review; and (8) whether the form is a public information collection requiring Office of Management and Budget approval (sec. 41).

Forms Control. The forms management function by which records are maintained to identify and control forms.

Forms Design. The forms management function by which the arrangement and construction of a form are determined.

Exempted Forms. Those forms that do not require assigned form numbers and forms approval, including: (1) forms used only once; (2) internal routing slips; and (3) worksheets used only by the originating unit.

Forms Management. (FSM 1370.5).

Optional Form (OF). A form developed by a Federal agency for use in two or more agencies and approved by the General Services Administration for nonmandatory Government-wide use.

Paper Form. Preprinted document with fixed information and blank spaces for entering variable information.

Specialty Form. Any form that is more complex in design or construction than a cut-sheet form. Examples include multi-part carbonless sets, computerized forms, optical character recognition forms, pads, card stock, labels, and tags.

Sponsor. The staff or unit that proposes a new or revised form.

Standard Form (SF). A form prescribed by a Federal agency, pursuant to its authority, and approved by the General Services Administration for mandatory Government-wide use.

10.6 - Form Classes

Follow the procedures in this chapter for designing, ordering, stocking, and reproducing these classes of forms:

1. Agriculture Department (AD) forms.
2. Forest Service (FS) forms.
3. Regional, Station, Area, and Forest Products Laboratory forms.
4. National Forest forms.
5. Standard Forms (SF) and Optional Forms (OF).
6. Other Federal agency forms.

10.7 - References

Use the references listed in sections 10.71-10.73 to design, manage, and order forms.

10.71 - Forms

The following forms are available from the General Services Administration. See sections 16.11 and 16.21 for information on ordering.

1. Form OF-0013, Forms Design Guide (8-1/2 X 11) NSN 7540-00-753-4603.

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2. Form OF-0013A, Forms Design Guide (11 X 17) NSN 7540-00-142-9270.
3. Form OF-13-C, ADP Form Design Spacing Guide (for 19 by 14 inches) NSN 7540-01-042-7396.

10.72 - Handbooks

To order items listed in paragraphs 1 and 2, follow the instructions for ordering forms in section 16.22.

1. Forms Analysis and Design, NSN 7610-00-753-4771.
2. Forms Management, NFS 7610-00-142-9363.
3. Standard and Optional Forms Facsimile Handbook 1988. To order, follow the instructions in section 15.3.
4. Federal Information Resources Management Regulations (FIRMR), incorporated into FSH directive system as FSH 6309.33. [Available from: Superintendent of Documents, U.S. Government Printing Office, Washington, DC 20402.]

10.73 - Catalogs

1. Departmental Forms Catalog, Form AD-640. To order, follow the instructions in section 16.11.
2. General Services Administration Supply Catalog, Office Products, Class 7540, Standard and Optional-Use Forms (for standard and optional forms not stocked at CFPDC). To order, follow the instructions in section 16.22.

11 - Forms Numbering System

The Forest Service uses a numbering system that coordinates with Forest Service Manual codes to identify and control both paper and electronic forms. The form number for Service-wide forms consists of the prefix FS, a 4-digit Manual title code, and a consecutively assigned suffix number of 1, 2, or 3 digits. Where necessary to avoid renumbering existing forms to accommodate a new form, a letter of the alphabet may follow the suffix number. Regional, Station, Area, or unit forms shall also include a prefix to identify the using or sponsoring unit. For example:

1. FS-2400-8, a Service-wide timber management form.
2. FS-5400-7, a Service-wide lands form.

3. R5-FS-2300-23, a Region 5 recreation management form.
4. NE/NA-FS-4800-32-1, a Northeastern Station and Area forest economics and marketing research management form.
5. InS-FS-1300-1, a Washington Office Information Systems Staff Form.
6. FS-1100-2a, a Service-wide directives form.

12 - Numerical Form Historical File

The Washington Office, Information Systems Staff, and this units responsible for the forms management programs must establish and maintain a record file organized by the number of the form. The record file is comprised of each form that a unit originates and is stored in either separate folders or on a magnetic or microfilm media. Divide the file between current and obsolete or superseded forms. Each individual form file folder must contain a copy of the following:

1. Current form. (If electronic, print out paper copy.)
2. Each form revision.
3. Each printing requisition, if printed.
4. Current negative, if printed.
5. Camera copy, if available.
6. Completed Form FS-1300-24, Form Request.

To aid in disposing of the material, divide the obsolete file by fiscal year. After the form becomes obsolete or superseded, the Forms Manager must use the appropriate retention period for disposal (FSH 6209.11, sec. 41).

13 - Forms Analysis and Design

13.03 - Policy

Comply with the standards, guidelines, and procedures for designing forms as established through the General Services Administration Forms Analysis and Design Handbook (sec. 10.72).

13.04 - Responsibility

It is the responsibility of the Washington Office Forms Manager to analyze (1) all proposed new forms for Service-wide and Washington Office use and (2) existing Service-wide and Washington Office forms that require revision before approving the form for issuance and/or printing (FSM 1370.42a).

13.1 - Analysis

The sponsor of a new or revised form must complete and submit the proposed form and Form FS-1300-24, Forms Request, to the unit Forms Manager for analysis. A form that has new or revised national reporting requirements requires simultaneous submission of a draft directive to the Service-wide Directive Manager (FSM 1391). Consult the General Services Administration Forms Analysis and Design Handbook for additional analysis guidelines (sec. 10.72).

Submit any form that collects information from the public to the Washington Office Forms Manager for review and clearance by the Office of Management and Budget (sec. 41). Forms analysis requires a careful review of each proposed data element to determine its value:

1. Considerations.

- a. Why does the Forest Service collect the data?
- b. What does the Forest Service do with the data?
- c. How does the Forest Service file and retrieve the data?

2. Benefits of Forms Analysis. Good forms analysis can save employee time, improve design, and reduce operating costs. Forms analysts should consider ways to improve forms using the following techniques and approaches:

- a. Reduce the total number and complexity of processing steps.
- b. Reduce the amount of time needed to fill in forms used in typewriters, word processors, or computer printers by improved spacing and use of tabs.
- c. Reduce the amount of time needed to fill in forms by facilitating eye and hand movement.
- d. Allow the use of new or more economical office machines and equipment in completing forms.

- e. Reduce the number of errors made and speed up data verification by numbering sequential steps to follow when filling in forms.
- f. Reduce the amount of time devoted to extracting or tabulating data by determining the method to be used when designing forms.
- g. Clarify procedural instructions and decrease reading time for the person filling in the form.
- h. Save processing time by replacing cut-sheets using loose carbon paper with continuous, carbon-interleaved forms, or carbonless paper.

13.2 - Design

Follow the standards described in the General Services Administration Forms Analysis and Design Handbook to the extent possible. Take into consideration the economic justification of the cost involved in producing the form and the time needed to produce the finished product.

Additionally, apply these basic design standards to new or revised forms:

1. Consider the form's use, distribution, and filing requirements.
2. Add the directive code (FSM and/or FSH numbers) underneath the form title.
3. If the form feeds a reporting system, add the report number to the directive code underneath the form title.
4. Arrange information on the form in a logical sequence.
5. Use box style whenever possible.
6. Number all data element boxes for easy identification.
7. Letter all column heading boxes for easy identification.
8. Make captions, titles, and instructions short and to the point.
9. Leave 2/6 of an inch between horizontal lines for handwritten entries on the form. For typed entries, leave 1/6 of an inch between horizontal lines.
10. Allow adequate horizontal writing or typing space for entries. There should be 1 inch for every 10 spaces.

11. Make the signature box 3 inches horizontal by 3/6 inch vertical. The 3/6 inch includes 1/6 inch for the caption title "signature".

13.21 - Electronic Forms

1. Use the Data General (DG) Comprehensive Electronic Office (CEO) system when creating an electronic form.

2. Design forms so they do not exceed paper the size of 8-1/2 by 11 inches. Forms can be created to read in either portrait (8-1/2 by 11 inches) or landscape (11 by 8-1/2 inches). See paragraph 4b for space limitations.

3. Set format rulers compatible with the unit's printer specifications. Closely coordinate with the Systems Information Manager on these printer standards.

4. Consider the capabilities of laser printers.

a. Output is almost typeset quality and should be used to print completed forms.

b. Information can be printed (in most cases) as follows:

	Rows or Lines	Columns or Characters
12 Pitch (Landscape)	47	127
15 Pitch (Landscape)	47	158
12 Pitch (Portrait)	62	96
15 Pitch (Portrait)	62	120

Lines on the printer are referred to as rows and characters are referred to as columns.

c. The 15-pitch format can help keep forms within the 8-1/2 by 11-inch paper size.

5. Avoid trying to duplicate paper forms by entering needless horizontal or vertical lines. Where needed, press the text attribute function key (shift-F7) and the underscore key (_) to underline or horizontally rule. Press the shift key and the "|" key (which is left of the DEL or delete key) to vertically rule. Do not enter vertical lines to form an outside border.

6. Enter user notes (text attribute function key (shift-F7) and an exclamation point (shift !)) for special instructions that are to appear only on the DG screen. For example, to allow more space for data to be inserted, enter instructions that are currently printed on a paper copy as a user note.

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7. Enter the form number and edition date on the first page beginning on line 1 in the upper right corner for Forest Service forms. For example:

USDA - Forest Service	FS-1100-2 (6/91)
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This allows the form number to always be on the first page and eliminates it being extended onto the second page. Also, since only currently approved forms can be made available electronically it is not necessary to indicate "previous edition obsolete."

8. Complete a document summary. This should be initiated by the sponsor and reviewed by the Forms Manager to meet the public files standards. Documents in the public files must conform to the following standards:

- a. Document Name. Enter the form number. For example: FS-1100-2.
- b. Author. Enter the originator of the form. (This should be the same as used to log on the DG. For example: A. User).
- c. Typist. Enter the name of the typist who created the form. (This should be the same as used to log on the system. For example: A. User).
- d. Subject. Enter the title of the form. For example: Directive Amendment or Supplement Processing Request.
- e. Summary. Enter a brief summary of the intent of the form. If the form is an input document to a report or automated system, include the report number or name of the automated system. This information can be used to find direction once it is filed in the unit's public files.
- g. Keywords. Enter the following keywords:
 - (1) Sponsoring staff user name.
 - (2) Author.
 - (3) Form Number. For example: FS-1100-2.
 - (4) A word to identify document by subject; such as travel, fire, and so forth.

13.22 - Paper Forms

Follow these basic design standards, in addition to those described in section 13.2, for new or revised paper forms:

1. Standard paper size is 8-1/2 by 11 inches.
2. Left and right margins should be 3/10 inch, top margin should be 2/6 inch, and bottom margin should be 3/6 inch.
3. If the form has a perforated stub (1/2 or 5/8 inch in width), do not include the stub size as part of the actual size of the form when measuring. The form itself should be standard size 8-1/2 by 11 inches when the stub is removed.
4. In the upper left corner of the form (not the margin), enter: "USDA-Forest Service".
5. Enter the form title at the top of the face page.
6. Enter the form number, followed by the edition date, in the lower right margin of the form.
7. If the form is a revision and if the previous edition cannot be used, enter "previous edition obsolete" in the lower left margin of the form.

14 - Electronic Forms

(Sec. 13.1). Submit any new Service-wide electronic forms or existing Service-wide forms recommended for conversion to an electronic form to the Washington Office Forms Manager, Information Systems Staff. Where field units are proposing Service-wide forms, the Washington Office Forms Manager shall refer the proposal to the Washington Office program staff for review and concurrence.

When converting an external form to the DG, the sponsoring staff must clear it with the external agency. For example, the Washington Office, Personnel and Civil Rights Staff must obtain approval from the Office of Personnel Management (OPM) for the conversion of the Form SF-171. If policy issues arise about entering any external forms on the DG, it is the responsibility of the sponsoring staff to forward this information to the Washington Office Forms Manager, Information Systems Staff, so that the information can be documented and shared Service-wide.

14.02 - Objectives

1. To ensure users have immediate access to current forms.
2. To reduce storage, printing, and mailing costs of paper copies.
3. To facilitate preparation of forms.

14.03 - Policy

1. After a form has been created electronically, the paper version of the form will not be reprinted or restocked; however, existing stock of the paper form should be used up. Follow the procedures in section 13.1 for proposing new forms and review section 13.2 before creating a form.
2. The edition date of electronic forms remains the same as the current paper version, unless the form is revised at the time it is converted.
3. Do not print excessive blank copies on DG printers; instead, make photocopies if multiple copies are needed.

14.04 - Responsibility

14.04a - Washington Office Forms Manager

(FSM 1370.42a). It is the responsibility of the Washington Office Forms Manager to:

1. Maintain, update, and distribute the Service-wide Electronic Forms Index.
2. Maintain up-to-date electronic Forest Service forms, as well as any Agriculture Department (AD) and Standard Forms (SF), for access through the National Forms Automailer.

14.04b - Region, Station, and Area Forms Managers

(FSM 1370.43a). It is the responsibility of Forms Managers at these levels to:

1. Distribute copies of the updated Service-wide Forms Index to affected staffs.
2. Store the Service-wide Forms Index on local electronic system(s).
3. Work with the local Comprehensive Electronic Office (CEO) Manager to provide support for users of the forms automailer.

4. Ensure that employees in all units receive training in accessing the forms through use of the automailer.

14.04c - Forest Forms Managers

(FSM 1370.43a). It is the responsibility of the Forest Forms Managers to:

1. Work with the local Comprehensive Electronic Office (CEO) Manager to provide support for users of the forms automailer.

2. Ensure that employees in all units receive training in accessing the forms automailer.

14.05 - Definitions

1. Service-wide Electronic Forms Index. This is the electronic comprehensive list of all forms that are available electronically through the forms automailer.

2. National Forms Automailer. The forms automailer is a retrieval tool available to employees with Data General (DG) Comprehensive Electronic Office (CEO) access. A copy of an electronic form can be mailed to personal CEO inboxes. The procedures for using the automailer system are similar to those used to request a vacancy announcement via FS Vacancy.

14.1 - National Forms Automailer

Follow the procedures in sections 14.11-14.11c to install automailer capability at each unit.

14.11 - System Pre-work for Automailer

In order for automailer to work, two adjustments must be made at every unit: remote aliases must be created on the system, and a specific drawer, folders, and some documents must be created in the public files.

14.11a - Responsibility

1. Comprehensive Electronic Office Manager. It is the responsibility of the Comprehensive Electronic Office (CEO) Manager to create remote aliases for the forms user id.

2. Regions, Stations, and Area Forms Managers. It is the responsibility of the Regions, Stations, and the Area Forms Managers to support distribution of forms available electronically through the automailer by ensuring that adjustments to local filing systems are made so that the automailer works.

3. Forest Forms Managers. It is the responsibility of the Forest Forms Managers to support distribution of forms available electronically through the automailer by ensuring that adjustments to local filing systems are made so that the automailer works.

4. District Support Services Clerk. It is the responsibility of the District Support Services Clerk to support distribution of forms through the automailer by ensuring that adjustments to local filing systems are made so that the automailer works.

14.11b - Creating a Remote Alias

Each unit needs to create a remote alias in the Comprehensive Electronic Office (CEO) for the Forms WO profile in order to retrieve forms using the forms automailer.

Have the local CEO Manager log on and enter the following, starting from the CEO Main Menu, to establish a remote alias for FORMS WO at your site:

7. Utilities

9. CEO Management Functions

1. User Information

2. Remote Aliases

4. Create

REMOTE ALIAS

Alias Name: **FORMS WO** (Userid or alias)

User Reference: **FORMS:WO1D** (Hostname)

Is this a (1.Local, 2.Global) alias? **1**

List in directory? (Y/N) **Y**

User Data1: (Description)

Execute? (Y/N) **Y**

If a remote alias is not defined for a site, users can still access the Washington Office forms mailer by sending their messages to "FORMS:WO1D." The use of the remote alias allows the site to have an entry in the directory for their users to find.

The unit must establish a userid (such as Forms RO) different from the remote alias named FORMS WO to access the National Forms Automailer in the Washington Office.

Once the remote alias is established, users can request forms from the National Forms Automailer.

14.11c - Adjustment to the Public Files

The operation of the Forms Automailer is dependent on the local system having available in a public drawer documents to be used for reference. The Unit Fileclerk (or the appropriate person on each unit) must prepare the drawer and documents using the following steps:

1. Create a public drawer named !FORMS. Give read access to all users.
2. Coordinate other user access requirements with the Unit Forms Manager. (Give edit access to the person who will maintain the drawer.)
3. Create two folders in the !FORMS drawer named:

!HELP

!INDEX

14.22 - Accessing Electronic Forms From the Forms Automailer

Electronic forms are available to users on the Data General (DG). Using the Forest Service communications network, users can retrieve into their inboxes any available electronic Service-wide form. Also, some Agriculture Department (AD) and Standard Forms (SF) are available through the automailer. Consult the index to verify which of these forms are available electronically.

Follow these steps to get current forms:

1. Log onto the DG.
2. Ensure that you have access to the public cabinet on your local DG.
3. Using a short message, send a message to the forms mailer's profile. For example: In the Washington Office, the profile is FORMS WO.
4. On the subject line, enter the form number. For example: FS-1100-2.

5. Press the EXECUTE function key (F1). (The form will be mailed to the requesting user's inbox.)

14.3 - Completing Electronic Forms

1. After receiving the requested electronic form in your inbox (sec. 14.22), file the form in your personal or staff space as a document.

- a. Type the desired text in each applicable blank field.
- b. Do not use the carriage return (CR key) or the form will reformat.
- c. If the field to be filled in varies in length or is narrative:
 - (1) Press the INSERT function key (F6).
 - (2) Enter the data and press the EXECUTE function key (F1).
 - (3) Continue to follow these steps until the form has been completed.

2. The signed record copy must be maintained by the originating staff.

15 - Standard and Optional Forms

15.01 - Authority

Federal Information Resources Management Regulations (FIRMR), Part 201-9, FSH 6309.33, prescribe the procedures that Federal agencies and the General Services Administration must follow when establishing, revising, or discontinuing an optional form or standard form.

15.03 - Policy

Forms Managers should consider establishing a standard form when two agencies of different departments administer similar data.

15.04 - Responsibility

It is the responsibility of the Regional Foresters, Station Directors, and the Area Director to advise the Washington Office, Director of Information Systems of any opportunity to develop a standard or optional form to replace a local, Service-wide, or Agriculture Department form. Such notification shall be by a letter to the Washington Office, Director of Information Systems or to the subject-matter staff, with a copy to the Director of Information Systems.

15.1 - Custom Printing

Process printing requests for standard forms and optional forms that may require overprinting, serial numbering, paper of a different color or weight, or any other alteration through the Washington Office Forms Manager, Information Systems Staff. Use Form SF-152, Request for Clearance or Cancellation of a Standard or Optional Form, or Exception, and attach a supporting statement as described in the "Instruction" block.

15.2 - Facsimile Handbook Subscription

The Washington Office, Information Systems Staff, Regions, Stations, the Area, and the Forest Product Laboratory shall subscribe to the Standard and Optional Forms Facsimile Handbook 1988 (sec. 10.72). This publication, developed by the General Service Administration, is an indispensable tool for Forms Managers who must weigh requests for developing local forms against the availability of standard forms or optional forms.

The Handbook contains:

1. A facsimile of each standard and optional form.
2. The National Stock Number (NSN).
3. Unit of issue.
4. Edition date.
5. A brief description of the paper type, size, and printing specifications.
6. Location where form is stocked.
7. Alphabetical index by form title.
8. Functional index.

Units may order subscriptions for the Standard and Optional Forms Facsimile Handbook from: Superintendent of Documents, U.S. Government Printing Office, Washington, DC 20402.

16 - Ordering, Stocking, and Reproducing Paper Forms

16.1 - Forms Stocked at the Consolidated Forms and Publications Distribution Center

16.11 - Ordering

Units have the option of using either Form AD-14, Request for Supplies, Forms and/or Publications, and Form AD-14a, Request for Supplies, Forms and/or Publications (Continuation Sheet) or Form CFPDC-1, Request for Forms and Publications, to order Standard, Optional, Departmental, and Forest Service forms from the Consolidated Forms and Publications Distribution Center (CFPDC), Washington Commerce Center, 3222 Hubbard Road, Landover, MD 20785. In completing either form:

1. Give the unit's complete street address (not post office box), customer identification number, and telephone number.
2. Group forms by class and put in numerical order. (For example: List Agriculture Department forms together in numerical order, then list Forest Service forms, and so forth).
3. Leave the form intact when mailing it except remove the last 2 memorandum copies as suspense copies.
 - a. Agriculture Department (AD) Forms. See Form AD-640, Departmental Forms Catalog, for a complete listing of AD forms and specific ordering instructions. Note that the CFPDC issues some forms only to the Washington Office; field units must order such forms as specified in section 16.2.
 - b. Standard Forms (SF) and Optional Forms (OF). The Departmental Forms Catalog, AD-640, lists the forms which are stocked at the CFPDC. However, all optional forms and some standard forms are issued only to the Washington Office from the CFPDC. These forms and other standard forms are available to all units from the General Services Administration (GSA). See section 16.21 for instructions on ordering these forms.
 - c. Other Federal Agency Forms. Certain forms issued by other Federal agencies and commonly used by Department of Agriculture agencies are listed in the Departmental Forms Catalog, Form AD-640, under the heading "Miscellaneous Forms And Other Issuances". Use Form AD-14 to order these from the CFPDC.

16.12 - Handling Back Orders

Do not submit new and additional copies of Forms AD-14, Request for Supplies, Forms and/or Publications, or Form CFPDC-1, Request for Forms and Publications, for back ordered forms. The Consolidated Forms and Publications Distribution Center (CFPDC) personnel mark back ordered items with the letter "X", send the requestor a marked copy indicating such, and put the request on back order in the warehouse's computerized perpetual forms inventory system. When the CFPDC receives the stock, warehouse personnel conduct a query of the system for the back order and then fill the orders in the sequence they were received. Forms Managers can call the CFPDC directly to verify the status on backorders for their unit.

16.2 - Forms Stocked Elsewhere

16.21 - Standard Forms and Optional Forms

1. Washington Office Staffs. Use the Automated Purchase Order System (APOS) (FSH 6309.12) to order standard and optional forms. Submit the order to the Procurement and Property Staff for processing.

2. Field Offices. Use Form SF-344, Multiuse Standard Requisitioning/Issue System Document, to order standard and optional forms not stocked at the Consolidated Forms and Publications Distribution Center. Submit this form directly to the nearest General Services Administration (GSA) regional office. (See Form AD-640, Departmental Forms Catalog, for the locations of the GSA regional offices.)

16.22 - General Services Administration Forms

The General Services Administration (GSA) forms not listed in the Departmental Forms Catalog should be ordered by letter from the nearest GSA regional office. Form AD-640, Departmental Forms Catalog, lists the locations of the GSA regional offices.

16.23 - Other Federal Agency Forms

The Departmental Forms Catalog, Form AD-460, lists those forms sponsored by other Federal agencies and available from the Consolidated Forms and Publications Distribution Center. Those not listed in this catalog must be ordered through the Regional or Washington Office Staff units responsible for the subject matter. These requests may be made by letter; Form AD-311, Speed Memo; or electronic mail message.

16.3 - Reproducing Cut-Sheet Forms

The Washington Office, Information Systems Staff manages new and revised Service-wide cut-sheet forms. In most cases, the Washington Office sends 5 master copies to Regional Offices

and 3 copies to Stations and the Area for reproducing. Each unit is responsible for reproducing and maintaining a minimum stock level according to use.

Forms Managers should analyze the cost benefits of annually consolidating the ordering and printing of the top 10 to 25 percent of Regional and/or Forest Service cut-sheet forms with a large annual usage rate.

16.4 - Determining Quantities of Forms to Stock at Unit Level

16.41 - Forest Service and Agriculture Department Forms Stocked at Consolidated Forms and Publications Distribution Center

To help maintain a stable inventory at the warehouse, units shall order a 6-month supply of each form and reorder only after reaching a 3-month supply level. Pay close attention to the unit of issue of each form.

To calculate a unit's form usage rate, take the total number of copies used over a recent period and divide this figure by the number of months in that period. This calculation establishes an estimated 1-month usage rate. However, remember that use of some forms is seasonal.

16.5 - Consolidated Ordering of Regional Office Specialty Forms

Forms Managers should consider the benefits of consolidating the ordering of specialty forms.

17 - Field Unit Forms Reviews

17.04 - Responsibility

It is the responsibility of the Regional Foresters, Station Directors, and the Area Director to advise the Washington Office, Director of Information Systems when an existing Service-wide form is out of date, inadequate, or when an existing Service-wide form is needed to replace a local form. Such notification shall be by a letter to the Washington Office, Director of Information Systems or to the subject-matter staff with a copy to the Director of Information Systems.

17.1 - Review of Field Unit Forms

Field units are responsible for annually reviewing their forms to:

1. Eliminate those forms no longer needed.
2. Eliminate unused data elements.
3. Consolidate and standardize forms.

4. Improve design to save employees time in filling out forms.
5. Increase or decrease number of copies ordered depending on use.

The Forms Manager shall initiate this review and units shall consult with their local forms managers when conducting reviews.

18 - Forms Listing

Each unit issuing forms must prepare and maintain a listing of authorized forms. Service-wide and Washington Office forms are listed in Exhibit 01 of section 18.1. Field units shall issue their lists as supplements on section 18.1. Form listing shall include the data elements listed in section 18.05.

18.05 - Definitions

This section contains specialized terms used in exhibit 01, (sec. 18.1) or field form testing (sec. 18.2) and their definitions.

Authority. Usually a reference to the Forest Service Manual (FSM) or to a Forest Service Handbook (FSH) which establishes and describes the form requirement. Whenever the form requirement is not explained in the FSM or FSH, the next best reference is given. For example, an Office of Management and Budget directive or a public law.

Edition Date. The date the form was originated or revised.

Form No. (FS-). The Forest Service form number is the unique number assigned to each Service-wide Forest Service form to identify it.

Form Title. The name of the form.

Remarks. Any significant additional information about the form. For example, Office of Management and Budget clearance information, size of form, and construction data.

Report Number. The unique number assigned to a report to identify it.

Supply Source. The organization which stocks and distributes copies of the form.

Unit of Issue. This is the minimum quantity that may be ordered for a form.

18.06 - Abbreviations and Acronyms

This section sets forth the abbreviations and acronyms used in the forms listing in section 18.1, exhibit 01.

18.06a - Acronyms Used For Supply Sources

CFPDC. Consolidated Forms and Publications Distribution Center.

DG. Data General, public forms drawer.

N/A. Not applicable, that is, the form is not used by the organizations indicated.

18.06b - Abbreviations Used For Units Of Issue

Use one of the following abbreviations to indicate the unit of issue for a form.

BK. Book.

BX. Box.

EA. Each.

HD. Hundred.

PD. Pad.

PKG. Package.

18.1 - Service-wide Forms Listing

Exhibit 01 is a compilation of those forms currently approved for Forest Service use. To be listed in exhibit 01, a form must be authorized in the Forest Service Manual or in a Handbook.

18.1 - EXHIBIT 01 IS A SEPARATE DOCUMENT.

18.2 - Field Unit Forms Listing

Use this code to list any field unit forms.