

## FORM PLANNER

*Used to initiate form planning process. Instructions are on the back of form.*

Date Received by Forms Manager \_\_\_\_\_

<b>Originating Dept:</b> _____	<b>Section 1</b>
Contact Name: _____	Phone No: _____
Originating Dept: _____	

<b>Need:</b> _____	<b>Section 2</b>
Purpose of Form: _____	
Related Forms: _____	Law/Code/Policy: _____

<b>People:</b>	
Who requires the data? _____	
Enters Data? _____	Extracts Data? _____

<b>Place:</b>	
Where Completed?: _____	
Processed? _____	Where Filed? _____

<b>Time:</b>	
When Completed? _____	Processed?: _____
Filed? _____	Deadline/Due dates? _____

<b>Method:</b>	
How Completed? _____	Processed? _____
Transmitted? _____	Filed? _____

**Number:** \_\_\_\_\_ **Section 3**

Pages: \_\_\_\_\_ Copies: \_\_\_\_\_ Forms to print annually: \_\_\_\_\_ Retention period: \_\_\_\_\_

\_\_\_\_\_ Vital

\_\_\_\_\_ Confidential

\_\_\_\_\_ Routine

Processing Flow Chart:

**Submit completed form to Forms Manager.**

### **Form Planner Instructions:**

#### **Section 1:**

**Complete all fields before submission.**

**Contact:** The Forms Manager's liaison for planning this form.

**Originating Dept:** The department responsible for this form.

#### **Section 2:**

Complete all fields before submission. Use space below for overflow if needed.

#### **Section 3:**

Check all that apply

#### **Flow Chart:**

Give a brief description of the projected flow of the form from the time the form is completed to final disposition.

#### **Forms Management Office:**

Approved: \_\_\_\_\_ Form # \_\_\_\_\_

Disapproved: \_\_\_\_\_