

**ORANGE COUNTY SOCIAL SERVICES AGENCY  
ADMINISTRATIVE POLICIES AND PROCEDURES MANUAL**

Subject: **Forms Request And Printing**

Number: E 18

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Approved:

Date: 02-24-03

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**I. PURPOSE**

- To establish a procedure for requesting new or revised forms, designating an existing form as obsolete, ordering forms, printing requests and distributing forms.

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**II. POLICY**

- All requests for new or revised forms shall be reviewed and action initiated by the appropriate Program Manager, Analyst or other designated individual.

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**III. PROCEDURE**

A. New or Revised County Form

B. New or Revised State Form

C. Process to Designate a Form as Obsolete

D. Ordering Forms (Stocked, Special Order Forms and Envelopes)

E. Printing

F. Follow-up

- 1. Program Managers shall send a memo to the Forms Control Unit designating the authorized signatures required to approve changes on SSA forms. 2. The requesting Manager or Analyst will submit to Forms Control a completed Request for New or Revised Form, F063-03-30 (Attachment I) and include a facsimile of the form (for printing capabilities see Attachment II). The requestor forwards the white and yellow copies of the Request for New or Revised Form, F063-03-30, and form facsimile to SSA/Forms Control Unit, Bldg. 15. Requestor keeps the pink copy for his/her records. 3. Form numbers will be designated as follows: a. The first 4 digits of all SSA Forms will be "F063". b. The next 2 digits identify the function code as shown on Attachment III. c. The final digits identify the specific form. This will be assigned by the Forms Control Unit as the next available number in sequence. 4. After reviewing the request, the Forms Control Unit will complete a Graphic Arts and Printing Requisition and forward it to PFRD/Publishing Services. 5. If a proof is requested, the Forms Control staff will forward a copy of the proof and Proof Approval Form, F063-03-95 (Attachment IV), to requestor for approval. Requestor shall complete Proof Approval Form and return to SSA/Forms Control Unit, Bldg. 15. 6. The Forms Control Unit will order the initial supply and make distribution per instructions on the Request for New or Revised Form, F063-03-30. 7. The Forms Control Unit, per instructions on the Request will distribute the Forms Action Notification (FAN) (Attachment V) for New or

Revised Form with a copy of the revised form attached.

- 1. The appropriate Program Manager/Analyst will review new or revised State forms to determine if SSA will use the form without modifications.2. State Form, No Modification Required for SSA UseThe appropriate Program Manager/Analyst will notify the Forms Control Unit by memorandum of the timing of initial distribution, stocking requirements, and FAN instructions. A copy of the new form shall be attached.3. State Form, Modification Required for SSA UseThe State form will be processed per the procedures for a New or Revised County Form, Section III (A).4. If Forms Control receives notice of a new or revised form directly from the State, it will be forwarded to the appropriate Program Manager/Analyst.
- 1. Requests to designate a form as obsolete must be made by submitting a completed Request for New or Revised Form, F063-03-30, signed by the appropriate Program Manager/Analyst. Check “obsolete” under box 2 and complete section B3 and, if appropriate, B4, FAN instructions.
- 1. SSA stocked forms, special order forms, envelopes and state forms are listed in the SSA Forms Catalog in alpha order by form number. The form number is shown as the manufacturer number. Stocked forms and stocked envelopes shall be ordered on a blue requisition, F063-03-93. Special order forms and special order envelopes shall be ordered on a yellow requisition, F063-03-94 (Attachment VI). If the form is to be revised, see sections III (A) - New or Revised County Form, and III (B) - New or Revised State Form.2. Type the form number exactly as it appears in the catalog.3. Type the form description exactly as it appears in the catalog.4. Each form has been assigned a stock number. The stock number of each form requested must be typed on the requisition.5. Some forms are printed in more than one language. Two alpha characters appear after the form number to indicate the various languages in which the form is printed. The alpha characters are the first two letters of the particular language, i.e., SP = Spanish, CA = Cambodian and VI = Vietnamese. Each language version of the same form has been assigned a separate stock number. Be sure to use the correct stock number.6. Special Instructions:Stocked Forms:a. List as many forms as the requisition will hold.b. Be sure to order the correct quantity. The packaging of stocked forms is included in the “Stock Description” field of the forms catalog.c. After the order has been entered into the County Automated Purchasing System (CAPS) a stock requisition number (SR#) will be generated by the system. This number will be entered on a copy of the requisition, which will be returned to the requestor. The SR# can be used to match the requisition with the packing slip.Special Order Forms, Envelopes and State Forms:a. Order only 1 form type per requisition in the quantity required.b. An “EA” in the “Unit” field in the catalog designates a special order form. Some special order form requests may be contracted out by PFRD/Publishing Services for printing to private vendors. Allow from six to eight weeks for delivery of special order forms.c. After the requisition has been stamped into the Mail Room, a copy will be returned to the requestor to verify receipt by Forms Control.
- 1. Printing requests shall be submitted on a blue requisition, F063-03-93.2. Attach a camera-ready form or material to be printed to the completed blue requisition and include the number of copies needed, color of paper, distribution, and any other requirements. (See Attachment II for other printing requirements.)
- Follow-up on any requests/revisions can be made by calling Forms Control at the number listed in the Orange County Telephone Directory for SSA/Purchasing.