

REGULATION

MONTGOMERY COUNTY PUBLIC SCHOOLS

Related Entries: DJA-RA, EGA-RA, EHC-RA

Responsible Office: Reporting and Regulatory Accountability

Management and Control of MCPS Forms

I. PURPOSE

To describe procedures for creating, revising, securing approvals, and distributing all forms used by Montgomery County Public Schools (MCPS).

II. DEFINITIONS

- A. A *form* is a printed or typed document with blank spaces systematically arranged for the entry of information (including form letters, or memoranda on which addresses and signatures must be inserted).
- B. A *forms register* is a catalogue or list of forms arranged systematically by number. The forms register also contains the location of the hard copy of the form as well as whether the form is also available as an interactive form on the Web site.
- C. The *forms Web site* includes all of the forms that are interactive (available to be filled in) for MCPS.
- D. *Interactive forms* can be filled out on the actual form, printed out, and used by the consumer.

III. GUIDELINES

In developing a new form, or revising an existing one, the following criteria are considered:

- A. The data requested on the form are needed to implement an approved operating procedure.
- B. The form is the most effective and efficient method of gathering needed information or obtaining approvals.
- C. An existing form cannot be adapted to meet the need.

- D. The form title reflects the purpose for which the form will be used.
- E. General instructions for completing the form are placed immediately under the heading. (On some forms that consist of several sections, instructions may appear at the beginning of each section.)
- F. The design of the form provides enough space for a user to reasonably complete the information. The design of the form does not impose unrealistic limitations on the user as to the number of copies required for processing.
- G. The cost of producing and using the form can be justified.

IV. PROCEDURES

A. Responsibility for Developing or Revising a Form

A deputy superintendent, chief operating officer, associate superintendent, department director, division director or school principal may initiate new forms and revise existing forms for use by MCPS in connection with programs in his/her area of responsibility.

1. In developing a new form or revising an existing form, the initiator is responsible for following the guidelines in Section III and:
 - a) Preparing a draft of the new or revised form
 - b) Receiving feedback on the draft form by individuals who may use or process the information collected
 - c) Using MCPS Form 226-17A: *Request for Action on an MCPS Form* and submitting the draft form to the Department of Reporting and Regulatory Accountability (DRRA) at least six weeks in advance of the date required
2. Review and Approval

Using the guidelines in Section III above, DRRA is responsible for:

 - a) Reviewing draft forms for format, clarity of construction, duplication of content, and consistency with MCPS regulations when appropriate
 - b) Assuring that the deputy superintendent, chief operating officer, or associate superintendent has approved the draft form

- c) Editing the draft form to ensure compliance with a standardized format and transmitting a copy of the form, as edited, to the originating unit for approval
- d) Determining the most economical type of reproduction (printing, placing on forms Web site, or both)
- e) Submitting the approved draft to Graphic Arts for preparation of a final copy
- f) Forwarding the final copy to Publications Services for reproduction

B. Forms Distribution

1. Forms used systemwide or between organizational units are normally stocked and distributed by the Division of Supply and Property Management. With the approval of the responsible associate superintendent or department director, an approved form may be stored in and distributed by the originating office.
2. The responsible administrator, through completion of MCPS Form 226-17A, *Request for Action on an MCPS Form*, notifies the Policy and Records Unit that:
 - a) The form is obsolete and should be rescinded.
 - b) The form is to be reprinted in its present format.
 - c) The form will be revised in accordance with the procedures outlined in Section A above.
 - d) A new form needs to be created.
3. MCPS forms stocked by the Division of Supply and Property Management or by the originating office are for use by the MCPS system only and are ordered by e-mailing the supply service supervisor, if stocked at the warehouse, or by phoning the originating office.

C. Maintaining a Forms Register

DRRA is responsible for maintaining a Forms Register. The Forms Register is found on the Forms Web site. The Forms Register includes the following information arranged in a variety of ways:

1. Form number and title
2. Form location
3. Latest date printed or revised (last action date)
4. Type of reproduction – whether or not the form is located on the Web site

Regulation History: Formerly Regulation No. 202-5, August 10, 1973; directory information updated January, 1983; reviewed April, 1988; revised May 21, 2008.