

## FORMS INVENTORY

Used to gather information about existing KISD Forms. *See reverse for instructions.*

### FORM IDENTIFICATION

Official Name: \_\_\_\_\_ KISD Form Number: \_\_\_\_\_

Unofficial Name: \_\_\_\_\_ Date Created: \_\_\_\_\_ Date Revised: \_\_\_\_\_

Department: \_\_\_\_\_ Record Series Title: \_\_\_\_\_

### FORM FUNCTION

Generated by (Dept) \_\_\_\_\_

Form Purpose: \_\_\_\_\_

Law or Policy: \_\_\_\_\_

**Consumer** (who completes the form)

**User**(who processes the form)

Completed by: \_\_\_\_\_ Received by (Dept): \_\_\_\_\_

No. of copies submitted: \_\_\_\_\_ Processed by (Dept): \_\_\_\_\_

Submitted to: \_\_\_\_\_ No. of copies Generated: \_\_\_\_\_

Copies routed to (Depts): \_\_\_\_\_

### FORM CHARACTERISTICS

**Format of Forms** (Check all that apply)

\_\_\_\_\_ Paper \_\_\_\_\_ Size \_\_\_\_\_ Color \_\_\_\_\_ No. Pages \_\_\_\_\_ No. Copies

\_\_\_\_\_ Electronic \_\_\_\_\_ Hard Drive \_\_\_\_\_ Internal Server \_\_\_\_\_ Web Server \_\_\_\_\_ Optical Disk

File Name: \_\_\_\_\_

**Other** (Explain) \_\_\_\_\_

**Variable Data**

How is the data written by the consumer? \_\_\_\_\_ Electronic \_\_\_\_\_ Manual

Confidential Fields? \_\_\_\_\_ All \_\_\_\_\_ None \_\_\_\_\_ Some

**Administration:**

Department or Campus: \_\_\_\_\_ Inventory Date: \_\_\_\_\_

Contact Name: \_\_\_\_\_ Contact Phone: \_\_\_\_\_

Person Conducting Inventory: \_\_\_\_\_

**Instructions:**

Complete the Forms Inventory for each form in the organization. This is divided into form sections. Each section represents a specific type of data about the form.

**Form Identification**

*Identifies the specific form being inventoried.*

Form Name: Both the official and unofficial names

Date Created: The date the form was created

Date Revised: The form revision date

Records Series No.: The number on KISD's retention schedule (III-GG)

Records Series Title: The title of the records series on KISD's retention schedule (III-GG)

**Form Function**

*Describes the function of the form. Why does it exist?*

Generated by: The unit that is responsible for the creation of the form

Form Purpose: What is the purpose of the form

Law or Policy: Statute, administrative code citation, etc which requires that information is collected

Consumer Section: This section provides information about those who complete the form

User Section: This section provides information about the departments that process the form

**Form Characteristics**

*The physical characteristics of the form.*

**Administration**

*Provides administrative information about the inventory itself for the forms management department.*

**What is a form?**

***What to look for to decide:***

**A paper form:** is a piece of paper containing pre-printed information and blank spaces for the entry of data in a predetermined format.

**An electronic form:** is a template in electronic format that assigns space in data fields for input of variable information and also assigns definitions. (i.e. there may be formulas or calculations)

**Common Forms:** form letters, consulting log, timesheets, administrative transactions, checks, questionnaires, spreadsheets, lists.

Some forms are found in both paper and electronic format.

Forms can be single sheets, 3 part (unit sets) continuous, or specialty.