

SAM – FORMS MANAGEMENT

FORMS DESIGN STANDARDS

1720

(Revised 9/2015)

Forms can be filled out and designed on paper or by electronic media. Agencies should follow the forms design standards, criteria, and techniques presented in the Forms Design Handbook. All agency forms and all State Standard (STD.) forms must contain the term “State of California”, the authoring department’s name, a form title, a form number, and a form creation or revision date. Contact the Forms Management Center (FMC) for information about forms design standards and software.

All State forms must comply with all other applicable form requirements (see SAM Section 1745)

Forms not included in the STD. Forms Program may not carry “STD.” or any variation of that designation as a prefix to the form number. If a form is removed from coordination as an STD. form and returned to management of the generating agency, the agency must change the number and identification at the next printing. These forms may carry a statement such as “Formerly STD. XXX”.

All agency forms must show certain identifying information. If there is space, you should place this information together on the form. The Forms Design handbook shows formatting for this information.

Form Titles – Form titles must describe both the form’s subject and function. See the Forms Management handbook for help with titling forms.

Form Numbers – Ideally, form numbers should be prefixed by the initials of the agency, i.e., FTB, WRCB, etc. The numbers may follow any plan or scheme that works for your agency but must not duplicate a number already in use by the agency. An exception is allowed if a number is differently prefixed or suffixed. A form used by an office or division within an agency may carry a sub-prefix. An example is “GS-OAS” for the DGS, Office of Administrative Services. Suffixes are often helpful to show field office versions with different mailing addresses or close relationship to another form, such as FTB 1000-LA, or DOJ 1000B.

Creation or Revision Dates – The date, if the form is new, must be the month and year in which the form was created or first distributed, such as “NEW 1-96”. If it is revised, the date will be the month and year in which the form was revised, such as “Rev. 1-96”. The notation “TEMP” may be used instead of ‘NEW’ or ‘Rev.’ on a form intended to be temporary, such as a form used in a short-term project. “TEST” or “PILOT” may be used on forms being tested before release to all users.

It is not advisable to preprint names of employees on forms unless there are compelling reasons to do so. An exception may be made for names of elected or appointed officials.