

SAM – FORMS MANAGEMENT

RESPONSIBILITIES OF THE DEPARTMENTAL FORMS MANAGEMENT REPRESENTATIVE (FMR) AND FORMS COORDINATOR (DFC)

1706

(Revised 7/2014)

[Government Code Section 14772](#) requires the director of each State agency to “. . . appoint a forms management representative (FMR) and provide necessary assistance to implement the State Forms Management Program (SFMP) within the agency.” FMR usually has a level of responsibility equivalent to a staff services manager position.

The FMR appoints and works with the departmental forms coordinator (DFC) to manage and maintain the forms management program within the agency. The DFC usually has a level of responsibility equivalent to that of a staff services analyst position.

These appointments are made using the form FMC 105 – *State Forms Management Program Appointments*, signed by the department director, and submitted to the Forms Management Center (FMC).

The primary responsibility of the DFC is to serve as liaison between the agency and the FMC. The DFC of an agency responsible for the content of a state standard (STD.) form works closely with the FMC to coordinate the development, design and publication of the form; including ensuring the proof review and approval cycle is prompt between authors and the FMC. Responsibilities for DFCs also include maintaining a list of forms distinguished by business- and public-use categories and keeping contact information about their authors current.

Agencies may also staff their forms management program with forms program managers, forms analysts, forms designers, forms authors, forms programmers, and proofreaders to assist their FMR and DFC in carrying out the forms management responsibilities of the agency.

Classifications commonly used to staff the forms management program have been staff services managers, associate governmental program analysts, staff services analysts, digital composers, information officers, and information systems analysts. Staff should possess the skills, knowledge, and abilities to carry out the duties detailed in SAM Chapter 1700 and the FMC's handbooks.

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1706 (Cont. 1)

On behalf of the agency, the DFC is responsible for:

- a. Coordinating the agency forms management program.
- b. Delegating duties to other appropriate personnel.
- c. Acting as the contact between the agency and the FMC.
- d. If the agency is responsible for the content of any STD. form, providing timely response to requests for information from the FMC.
- e. Inventorying and establishing an ongoing system of controls for the forms ordered and maintained by the agency.
- f. Providing safeguards in all forms management activities for the protection of individual privacy and confidentiality of information.
- g. Reviewing and approving requests for printing or creation of electronic versions of forms for the agency or delegating those responsibilities in the way that is most effective for the agency.
- h. Determining that only necessary forms are ordered or established in electronic media and that those forms meet the standards set forth in the Forms Design Handbook.
- i. Ensuring that the new or revised forms meet the standards set forth in the Forms Design Handbook and the Forms Management Handbook.
- j. Ensuring discontinuance of obsolete forms from the agency system.
- k. Conducting research into forms management problems.
- l. Conducting forms analysis for designing or redesigning the agency's forms.
- m. Being responsible for reports required by the FMC for administration of the program. These include, but are not limited to, reports on the agency Public Use Forms Program and the Business Use Forms/Reports Program.
- n. Distributing information on forms management activities.
- o. Coordinating with the agency training office to provide and make arrangements for appropriate training of forms management personnel.