

Section Twelve

FORMS

12. FORMS

12.1 General : The creation of Forms

Generally, forms should be created only as needed to streamline the operations of the Government. Their design should meet standard guidelines for the preparation of forms, and their printing and distribution should be efficiently managed.

The design, printing and distribution of new forms are currently done in t Ministries and Departments. The Chief Records Manager Officer can provide advice and assistance with the design of new forms.

The following factors should be taken into consideration in determining the form and when creating and designing new forms:

- **Control of the creation of forms.** Ensure that the form is necessary and that the information is not being already gathered by another form.
- **Elimination of obsolete forms.** Obsolete forms are frequently retained and used after they have been replaced. Ensure that users of the form are notified of the new form and advised to destroy the previous form.
- **Standardize form design.** The order in which name, address, phone number and other personal identifiers are requested should be the same on each form. The Government's visual identifiers should be present on each form.
- **Standardise and streamline distribution.** The number of copies of each form and their destination must be justified. Departments and individuals should not receive the same information from two or more forms.

In addition, a standardized form number should be assigned to all new or revised forms indicating the version, number and date of introduction of

the form. These numbers can be obtained from the Chief Records Management Officer. One copy of all finalized new or revised forms should be submitted to the Chief Records Management Officer for enclosure on a 'form' case file. This procedure does not have to be followed for new forms within the use of a single organizational unit.

12. 12 SAMPLE FORMS

Sample forms in this Manual are shown in figure number order as follows:-

1. Inward Correspondence Register
2. Valuables Book or Remittance Register
3. Outward Correspondence register
4. Messenger's Dispatch Book
5. Sample File Cover
6. Minute Sheet
7. File Diary
8. File Transit Sheet
9. File Movement Slip
10. File Census Form
11. Proposal to Destroy Scheduled Records
12. Records Centre Transfer List
13. Records Centre Request Form
14. Records Centre Disposal Form

National Archives and Records Management Unit

Inward Correspondence Register							
Serial Number	Date of Letter	Date Received	From whom Received	Agency Reference	Subject	Officer to whom file was passed and date filed	File Number

Fig.1

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Valuables or Remittance Register

Sheet No _____

Serial number	Date Received	Remitter's Name	Amount	Cheques Only		Name and signature of Officer Opening Remittance
				Bank Sort Code	Cheque Number	

Fig. 2

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Outward Correspondence Register						
Serial Number	Date Received for Dispatch	Date Dispatched	Subject	Reference Number	Addressee	Mode of Dispatch

Fig. 3

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Messenger's Dispatch Book				
Date Dispatch	Reference Number	Messenger's Name	Name of Agency	Name and Signature of Receiving Officer and Date

Fig 4

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Sample File Cover

Office of the Head of the Civil Service

NUMBER	Number pages serially at top outer corner in blue pencil.						FILE NO.		
	Number minutes serially beginning a new series for each page.						PB_		
	Write minutes on the last page of the last enclosure, if there is space, or on the last page, if the paper is suitable, otherwise insert a minute sheet in the file.						Vol.		
	NAME								
	To	Page	Date	To	Page	Date	To	Page	Date
							<i>Authority to send file to Records Room</i>		
						<i>Signature of Authorising Officer</i>		Date	

Fig. 5

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Minute Sheet

Date	Minute	<hr/> File Reference

Fig. 6

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<p style="text-align: center;">File Movement Slip</p> <p style="text-align: center;">Use for long-term movements</p> <p>(Please complete this form and send it to the Records Office when you pass a file to another officer. This will enable the Records Office to keep track and ensure that its records are accurate.)</p> <p>File number: File title:</p> <p>Passed to..... Location..... Date..... Signature</p>

Fig. 9

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Records Centre Request Form

Box Number _____ Location _____

Records Office code number _____

Agency/Unit _____

File Number _____

File title or description of record required

Date loaned _____

Signature of issuing officer

Signature of receiving officer

Reminder form sent

Second reminder form sent

Reported to Records Centre Manager

Date returned

Fig. 13

Records Centre Disposal Form

Records Office Code Number: _____

Consignment Number: _____

The records listed in the enclosed transfer list (s) are now due for action as indicated in the 'action category'.

Please complete and return the reply slip below.

If we receive no response from you within three months of the date of the report form we will assume that you agree to the action as indicated on the transfer list (s).

Signed: _____

Head of Records Centre

Reply Slip

Records Office: Code Number: _____

Consignment Number: _____

I have considered the records listed on the transfer list (s) and authorise the following action (s):

1. The records specified should be destroyed*
2. The records specified should be retained for further period of _____ years as the records are still required for official business*
3. I recommend that the records be considered for transfer to the archival institution for permanent retention*

*Cross out which are not appropriate

Signed: _____

Position: _____

Date: _____

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Fig.14