FORMS MANAGEMENT

I. REFERENCES:


II. POLICY:

For the purposes of this policy, a form is any piece of paper containing printed information, produced or reproduced by whatever means, with blank spaces left for the entry of additional data or information.

A. Responsibility:

Any form which will be used by more than one UCSB department, or any departmental form used to collect personal information should be submitted to the Information Practices/Records Management Coordinator in Business Services for review prior to reproduction. This review is necessary to insure that the necessary privacy notification statements are included. The Information Practices/Records Management Coordinator will advise on forms design and ordering procedures. In addition, the Information Practices/Records Management Coordinator will coordinate (and serve as the liaison for) the review and ordering of Systemwide forms generated by the Office of the President.

B. Forms Design:

The following basic information must be preprinted on campus department and interdepartmental forms:

1. Title of form

2. University of California, Santa Barbara identification

3. Departmental identification

4. Approved University records retention period for the form; see Records Disposition Schedules Manual. (If disposition schedule is to be determined, the Information Practices Coordinator/Records Management Coordinator will submit the necessary information to the Office of the President, in accordance with UCSB Policy 7050.)
Please direct questions about these policies to Meta.Clow@vcadmin.ucsb.edu. For questions or comments regarding the format of the above information, please contact webcontact@ucsbuxa.ucsb.edu.

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