

**FORMS MANAGEMENT**

**FILE: EH**

**TITLE: Forms Management Procedures**

**POLICY:**

- (1) Forms
  - (a) An official "form" shall be defined as any form, document, memorandum, letter, or method which meets any of the following criteria:
    - (i) Collects, maintains, or reports items of information in multiple locations per applicable statutes, laws, Board policies, Management Directives, and/or standard operating procedures;
    - (ii) Requests or requires information from the public;
    - (iii) Causes the expenditure of OCPS funds directly or through staff action; or
    - (iv) Utilized to provide communication to multiple areas to comply with Board policies, Management Directives, or standard operating procedures.
  - (b) Due caution shall be exercised to protect the privacy of the records of individuals.
- (2) Forms Management Control System - Generally
  - (a) A Forms Management Control System ("System") shall be established and implemented under the direction of Orange County Public Schools ("OCPS") Records Management to facilitate compliance with the rulemaking procedures of Chapter 120 and Sections 1008.385 and 1001.42 (13), Florida Statutes, and to provide efficient, timely, accurate, and valid information and data gathering.
  - (b) Any form which imposes any requirement or solicits any information not specifically required by State Board of Education Rules or an existing Board policy shall be included in the definition of "rule" and the rulemaking adoption procedures of the Administrative Procedure Act shall apply.
  - (c) Regardless of native or published format, all documents or forms meeting the policy definition of a form are subject to review by Forms Management and shall be maintained in the Forms Management central forms index.
- (3) Functions of the Forms Management Control System

- (a) The System shall be designed to create, coordinate, and control the data collection forms that are used throughout OCPS in the ordinary course of business.
  - (b) Objectives of this System shall include, but not be limited to, the following:
    - (i) Ensure maximum coordination and efficiency of data collection;
    - (ii) Simplify reporting requirements and formats of data collection forms;
    - (iii) Consolidate or eliminate data collection and all other types of forms to minimize duplication of efforts; and
    - (iv) Assist data collectors in locating data that is readily available to meet their needs.
- (4) OCPS Forms Review Committee
- (a) Pursuant to Section 1008.385 Florida Statutes, the Superintendent or designee shall appoint an OCPS Forms Review Committee (“Committee”) comprised of members selected from OCPS’s administrative and instructional staff. A majority of the Committee shall be instructional staff nominated by the collective bargaining agent.
  - (b) The Committee, working in conjunction with Records Management, shall periodically recommend any revised procedures for eliminating, reducing, or consolidating paperwork and data collection requirements.
  - (c) An annual report describing activities and findings shall be submitted to the Board by the Committee.
- (5) Authority
- (a) All official OCPS forms used by departments, programs, and offices under the Board’s jurisdiction shall be subject to procedures developed for this System including a review and approval or denial of all such forms.
  - (b) Each approved form shall be assigned a unique identification number and include a date of issue. A reference to the specific statutory authority, law, and/or Board policy governing the initiation of the form shall accompany each district department, program, or office form request. All records shall be maintained by Records Management. Any form meeting the criteria of an approved official form without a unique identification number or issue date shall not be used.
  - (c) In the event a form is updated for any reason, no previous versions of the form shall be used and any such previous versions of the form shall be disposed of pursuant to Board Policy EHB Data and Records Retention.

(6) Authorization and List of Forms

OCPS forms that are indexed by Records Management shall constitute the approved OCPS forms as required by Section 120.53, Florida Statutes. A copy of any form can be obtained from Records Management or directly from the official forms index located on the OCPS Records Management internet and intranet sites.

(7) New or Revised Forms

Any new or revised form shall be submitted to OCPS Records Management for review. Any form developed by OCPS that imposes any requirement or solicits any information not required by the Florida Statutes or by any existing State Board of Education Rule shall be submitted for approval by the OCPS Forms Review Committee and, upon approval, shall be placed on file in Records Management.

(8) All forms shall be in compliance with applicable Florida laws.

**SPECIFIC AUTHORITY:** Sections 120.53(2); 1001.42; 1001.42; 1008.385; and 1008.385, Florida Statutes

ADOPTED: 10/12/93

REVISED: 10/03/12; 12/11/12; 05/10/16