

## INSTRUCTIONS FOR COMPLETING THE FORM INPUT SHEET

The form input sheet is to be filled out for each form and then forwarded along with four actual samples of the form to the agency records coordinator.

1. **State Form Number** – DO NOT FILL THIS IN. This number is assigned by the Office of Administration, Forms Management.
2. **Form Title** – If no title exists, develop a form title from the key word list (see page 2). The title should be concise and descriptive of the function of the form. It should also be as unique as possible. The 31 digit input version of the title should clearly represent the title of the form. For envelopes the size and type should be included in the title. (i.e., 10W indicates a number 10 window envelope).
3. **Catalog Number** – LEAVE THIS BLANK. It is filled in by Forms Management.
4. **Analysis Code** – The analysis code is taken from the keyword list (see page 2). The keyword list is divided into three sections. Pick one number from each section. When they are put together they should make a phrase describing the function of the form.
5. **Class** – The following class codes should be used:
  - 1-Contract printing job (vendor)
  - 2-Non-contract printing job (i.e., University of Missouri Press)
  - 3- Computer "flushed" job
  - 4-Agency produced job
  - 5-MCI produced job (Prison Industries)
  - 6-State Printing produced job (including Office of Administration copy center)
6. **Taxpayer Impact Status:**
  - C - Completed in whole or part by taxpayer
  - (blank) no direct impact to the taxpayer
7. **Number of Parts** – Enter the number of parts of each page and not the number of pages. (Number of parts refers to NCR paper or carbon interleave paper" 2-part – white, canary; 3-part – white, canary, pink; etc.)
8. **Construction of the Form**

01 – Single flat sheet	13 – Triple Window Envelopes
02 – Continuous	14 – Letterheads
04 – Unit sets (several different pages to a set)	16 – Tags/Labels
06 – Multi-part/Multi-color (carbon or carbonless)	18 – Checks
08 – Form letters	20 – Ledgers
10 – Receipts	22 – Booklets/Listings/Reports
11 – Double Window Envelopes	99 – Not elsewhere classified
12 – Envelopes	
9. **Size of the Form**

02 – Larger than 8 ½ x 14 (white)	14 – 8 ½ x 14 (color) (or multi-color)
04 – 8 ½ x 14 (white)	16 – 8 ½ x 14 (color) (or multi-color)
06 – 8 ½ x 11 (white)	18 – 8 ½ x 14 (color) (or multi-color)
08 – 8 ½ x 5 ½ (white)	20 – Smaller than 8 ½ x 5 ½ (color)
10 – Smaller than 8 ½ x 5 ½ (white)	99 – Not elsewhere classified
12 – Larger than 8 ½ x 14 (color)	
10. **Effective or Revised Date** – Effective date refers to when the form was first created. Revision as defined for use here includes *any* change in forms design or construction. (Use the most recent date.)
11. **Change Pending** – For Forms management use only.  
*\*Please let someone know if a form is obsolete.*
12. **Old Form Number** – This is used for the agency form number if different from the state form number.
13. **Annual Usage** – Enter number of thousands expected to be used per year. (Sample: 10,000 would be 10. If less than 1,000, mark – 1.)
14. **Retention Schedule Reference** – Enter here the number of the schedule from the Records Retention Schedule (as outlined by the Secretary of State.)
15. **How is Form Completed?**
  - W – Form is filled out by hand.
  - X – Form is filled out by typewriter.
  - Y – Both
  - Z – Other (computer generated, etc.)
16. **Window Envelope Used?**
  - 1 – Yes, form is used with a window envelope.
  - 2 – No, not used with a window envelope.
  - 3 – Double window envelope used.
  - 4 – Triple window envelope used.

17. **Agency, Division, Unit** – Indicate the agency name, divisions and units that use this form.
18. **Other Impacted Units** – List any unit that must add or extract information from the form specifically including data entry or retention of a multi-part form. Leave blank if there is no impact on other agencies.
19. **What Does This Form Do?** – The thrust here is the defining of the real function of the form. The key is what specific action is initiated by this form. An example of a poor response for the Forms Input Sheet is "It provides approval of forms." A better response would be: "It provides justification of forms for the approval decision and inputs key information to the computer." The second related the actions generated by the form more clearly.
20. **What Requires This Form?** – Is it required by a law, rule or other reason? The specific law or rule should be written down.
21. **Who Completes It?** – Make note of forms completed by more than one unit, and also include the source of information, noting form numbers of specific source documents.
22. **Who Uses It?** – For multi-used forms, include all major users, and as many minor users as possible. Also note how the information is used.
23. **Distribution, Routing and Justification. Route to** – enter the ultimate recipient unit or agency.  
**Justification** – This is the justification for receiving and retaining the form. "Information" is not an acceptable justification. "For federal audit" is the type of justification that should be entered.

### KEYWORD LIST

Function Keywords		Operation/Condition Keywords		Subject Keywords	
02	To acknowledge	01	Absence of	01	Accidents
04	To apply	02	Acceptance of	02	Accounts
06	To assign	03	Addition to	03	Advertising
08	To authorize	04	Adjustment of	05	Applicant/Claimant
10	To cancel/reject	05	Aging of	06	Appropriations
12	To certify/verify	07	Allocation of	07	Audit
14	To claim	08	Analysis of	09	Banking
16	To encumber	09	Application for/of/	10	Beneficiaries
18	To establish		Request for	11	Benefit Plans
20	To estimate	10	Approval of	13	Bonds & Debts
22	To follow up	11	Assignment of	14	Budgets
24	To identify	13	Attendance of	15	Buildings & Facilities
26	To instruct	14	Audit of	17	Cash
28	To justify	15	Availability of	18	Claims & Benefits
30	To notify	16	Cancellation of	19	Communication
32	To order	17	Certification of	21	Complaints
34	To record/log	19	Change of	22	Contracts
36	To report	20	Charge-off	23	Correspondence
38	To request	21	Charge	25	Cost
40	To schedule/plan	22	Collection of	26	Data Processing/
42	To summarize	23	Completion of		DP Files
44	To transmit/input	25	Compliance	27	Depreciation
99	Not elsewhere classified	26	Computation of	29	Employees
		27	Condition of	30	Employment
		28	Contents of	31	Fuel
		29	Correction of	33	Funds
		31	Cost of	34	Furniture & Fixtures
		32	Creation	35	Grievance
		33	Damage of	37	Hearing/Trials
		34	Debit/Credit of/	38	Insurance
			Balance	39	Keys & Locks
		35	Deduction of	41	Land & Property
		37	Delinquency of	42	Laws/Rules/
		38	Delivery of		Procedures
		39	Deposit of	43	Leases
		40	Depreciation of	45	Loans & Grants
		41	Destination of	46	Machinery &
		43	Destruction of		Equipment
		44	Employment of	47	Material & Supplies
		45	Encumbrance of	49	Meeting
		46	Estimate of	50	Orders
		47	Information about	51	Patients
		49	Inspection of		
		50	Insurance of		
		51	Investigation of		
		52	Issuance of		
		53	Lease of		
		55	Location of		
		56	Loss of		
		57	Movement of/Release		
		58	Operation of		
		59	Ownership of		
		61	Payment of		
		62	Procurement of		
		63	Production of		
		64	Recall of		
		65	Receipt of		
		67	Recovery of		
		68	Refund of		
		69	Repair of/Maint.		
		70	Replenishment of		
		71	Requirement of		
		73	Results of		
		74	Retention of		
		75	Return of		
		76	Routing of		
		77	Sale of		
		79	Scheduling of		
		80	Services		
		81	Status of		
		82	Termination of		
		83	Testing of/for		
		85	Training of		
		86	Transfer of		
		87	Transmittal of		
		88	Transportation of		
		89	Use of		
		91	Value of		
		92	Verification of		
		93	Violation of		
		94	Warranty of		
		95	Withdrawal of		
		99	Not elsewhere classified		