



FORMS COORDINATOR
ALL-HANDS
NOVEMBER 27, 2023

NORTH
Dakota
Be Legendary.

Information Technology

Agenda

- Forms Coordinator Responsibilities
- Forms Management Basics
- Submitting a State Forms Request
- State Forms Services
- Tools and Resources
- Questions

Forms Coordinator Responsibilities

- Distribute annual forms inventory to divisions/sections and work with them to review and update the inventory.
 - Certify forms inventory in RMS.
 - Request any adds/changes/deletions to State Form Numbers (SFN) through ServiceNow.
- Review forms created internally to verify State Forms Design Standards are being followed.
 - Standards and Forms Design principles are on the Records Management [website](#)
- Periodically evaluate internal forms management practices.

Forms Management Basics

- Definition of a form
- Assignment of an SFN
- Privacy Act Statement
- Forms Inventory Process

Form Definition

The Century Code definition of a form is found in [Section 54-44.6-02](#): "Form" means any document designed to record information and containing blank spaces and which may contain headings, captions, boxes or other printed or written devices to guide the entry and interpretation of the information.

Assignment of SFN

A State Form Number (SFN) **would be required** in the following situations:

1. Documents that contain fill-in-the-blank areas.
2. Checklists that show a burden of proof that a process or procedure has been followed (prove an action or steps were taken) or if there are additional fields to be completed.
3. Regardless if forms are distributed internally or externally to the department.
4. Could be completed in hardcopy, electronic, or web-based format.

The following items **would NOT** require a State Form Number (SFN):

1. Read and sign documents where only a signature and date are required (i.e. agreements, contracts).
2. Checklists where the sole purpose is to check items off.
3. Data capture screens developed as part of a web-based application or system.
4. Used only one time

Privacy Act Statement

As part of the requirements of U.S.C.552a (Privacy Act of 1974), forms requesting a Social Security Number (SSN) must include the following information:

- Authority: The legal authority for collecting the information and whether disclosure of such information is mandatory or voluntary;
- Purpose: The purpose(s) for which the information will be used; and
- Effect(s) of not providing the information, if any.

A statement that summarizes this information must be included on any form requesting a social security number.

Forms Inventory Process

- Log into RMS
<https://apps.nd.gov/itd/recmgmt/rm/user/login>
- Quick overview of process
- Detailed instructions on the [website](#)

State Forms – ServiceNow Requests

- When to submit a request:
 - SFN assigned to a form
 - NDIT to review a form (agency-designed)
 - NDIT to design a fillable pdf or online form (Jotform)
 - Updates to annual Forms Inventory (SFN listing)
 - JotForm license
- How – [Demo](#)
- Resources:
 - Instructions on [NDIT website](#)
 - [KB article](#) (part of the request) if step-by-step instructions needed

State Forms Services

Self-Service

- Subject Matter Experts: You know your needs!
- Increased Productivity: You know your timeline!
- Low Cost: Licenses are reasonably priced
- Supported development: every licensed user has access to support services from Adobe or JotForm and from NDIT where needed.

NDIT Forms Development

- NDIT creates/modifies the form for your agency.
- The Data Science & Analytics group can create surveys for you using JotForm.
- JotForms can be integrated into websites or other platforms.

Tools and Resources

Adobe Designer (AEM)

- Enterprise tool to create printable (paper) forms and fillable PDFs
- PDFs can be added to [State eForms Website](#)
- Compatible with Adobe Sign for verified signatures

Resources:

- [NDIT Records Management Website](#) under Forms Management section
- NDIT can provide training for licensed users
- Community of Practice: Adobe Ask-the-Experts every other Thursday from 11-11:30.

Tools and Resources

JotForm

- Enterprise data collection platform that creates online/e-forms
- Browser and mobile friendly: can replace fillable PDFs, paper forms, and other survey or Office-suite tools such as Word/Excel/MS Forms
- Improves data quality, integrity, and accessibility for users and citizens

Resources:

- [Enterprise Data Collection Platform \(Online Forms\)](#) service page
- JotForm has training available for licensed users
- Community of Practice: JotForm Ask-the-Experts every other Wednesday from 11-11:30.

Questions?

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Visit our website: [Records Management | \(nd.gov\)](https://www.nd.gov/records)