

- (c) Add the suffix “TEST” for test forms.
- (d) Add the suffix “WS” for a worksheet.

g. Supersession Notice.

Center the supersession notice at the bottom of the form outside the border. Standard supersession notices used on forms include:

- (1) “Previous editions are obsolete.” Previous versions of this form are no longer authorized for use.
- (2) “Previous editions will be used.” Previous versions of this form are authorized for use.
- (3) “Replaces DD Form XXXX, which is obsolete.” This form replaces a form which is identified and no longer authorized for use.

h. Office of Management and Budget (OMB) Control Number and Expiration Date.

The OMB control number and expiration date must be displayed on forms that are used to collect information from the public.

- (1) Forms requiring OMB approval must be accompanied by an instruction page or a link to a set of instructions written in plain language pursuant to DoDI 5025.13.
- (2) An agency disclosure notice (ADN) must be displayed on all forms that require an OMB control number. The notice must be displayed across the top of the form, immediately below the form title and the OMB control number. In accordance with Volumes 1 and 2 of DoDM 8910.01, use the ADN shown as illustrated in Figure 1:

Figure 1. Agency Disclosure Notice

The public reporting burden for this collection of information is estimated to average XX minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to the DoD, Washington Headquarters Services, Executive Services Directorate, at whs.mc-alex.esd.mbx.dd-dod-information-collections@mail.mil. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid Office of Management and Budget control number.

i. PAS or PA.

If a PAS or PA is required in accordance with the Privacy Act of 1974 and DoD 5400.11-R, it must be displayed in one of the following ways.

(1) On the face of the form immediately below the title. If the form has an ADN, place the PAS immediately below it.

(2) On the back of the form with the notation, “Please read the Privacy Act Statement or Privacy Advisory on back before completing the form,” located immediately below the title of the form.

(3) On a separate sheet to be distributed with the appropriate form(s). A PAS or PA displayed on a separate sheet is normally a lengthy or blanket PAS or PA that is applicable to one or more forms used for the same purpose.

j. Instructions.

Placement of instructions should be consistent on the entire form and may not establish policy or assign responsibilities.

(1) If the instructions are brief, they can be included in individual captioned boxes or in parentheses after the block or caption title.

(2) Instructions can be added using “Tool Tips” provided by electronic forms software to assist users in filling out forms quickly and accurately.

(3) If the instructions are lengthy, they can be divided into columns and placed where applicable on the form, or, when justified, they can be issued on a separate page. Instructions should be limited in length and should only provide guidance for completion of the form.

k. Abbreviations and Acronyms.

Spell out abbreviations and acronyms the first time they are used and follow with the abbreviation or acronym in parentheses. After that, use only the abbreviation or acronym. Exceptions may be made for common, widely known acronyms.

l. Using Illustrations or Graphics on a Form.

The use of decorative illustrations or graphics, including official logos, is prohibited. The illustration or graphic may be used only if it serves a functional purpose.

m. Fillable Fields.

(1) Field Names.

If a form has an associated database, use the data elements provided by the OPR. Do not start or end a field with a number. Do not use spaces or special characters, punctuation marks, or symbols.

(2) Formatting Field Names.

Fix the number of characters in a field in accordance with guidance provided by the OPR. Data fields will be consistent across all forms. Examples contain the following:

(a) Format the date field as the 4-digit year, 2-digit month, and 2-digit day, “YYYYMMDD,” with an eight character fixed field length.

(b) Format the SSN field as a numeric fixed field 11 characters in length, “NNN-NN-NNNN.”

n. Signature Fields.

(1) The National Archives and Records Administration requires a separate block or field for the signer’s typed name. The OPR needs to determine whether digital signatures will lock specific fields once signed.

(2) Format the DoD identification number as a numeric field 10 characters in length, “NNNNNNNNNN.”

o. Testing Electronic Forms.

The form designer, DoD or OSD Component FMO, and OPR must test completed form designs before forms are released to ensure they are functioning correctly.

p. Accessibility.

To accommodate all users, including those with disabilities, forms should be designed to be simple and usable, with meaningful captions and clear and concise instructions (see DoDM 8400.01.)

q. Locking Final Forms.

The forms designer locks the final electronic form so that the information collected is in the format and sequence specified by the OPR, the recipient of the information. Unlocked forms may be requested with sufficient justification. Obtain further guidance from the DoD FMP office.

r. Classification.

The DoD or OSD Component FMOs must indicate on DD Form 67 whether a form is classified. The requesting component FMO or OPR must provide instructions for design integration of classification markings on forms in accordance with Volumes 1 through 4 of DoDM 5200.01.

6.3. DOD AND OSD COMPONENT DESIGN GUIDELINES.

DoD and OSD Components may expand upon the guidelines in Public Law 111-274 and the guidelines in this issuance for the design, analysis, and typography of their DoD and OSD Component forms. All supplements require the DoD FMO approval.

6.4. DESIGN PROCESS.

The design of a form must meet DoD and OSD Component OPR needs and conform to GSA and DoD design guidelines. To ensure that these requirements are met, the DoD or OSD Component OPR and FMO must work with FMP throughout the design process.

a. Drafting the Form.

The DoD FMO designs all DD and SD forms.

(1) The form OPR must work with the DoD or OSD Component FMO to produce a draft of the proposed new or revised form. The draft may be a pencil sketch of the form's layout, a pen and ink annotation, a detailed e-mail explaining changes on an existing form, or other appropriate descriptive method. The initial draft, together with a completed DD Form 67 and a copy of the prescribing document or issuance, must be submitted through the DoD or OSD Component FMO to the DoD FMO for review, design, and approval.

(2) The DoD FMO must produce a draft version of the form. The form must be labeled in the lower left corner as a draft with the date of the draft entered next to the form number. The draft date will change with each iteration to aid in tracking the form throughout the design process. The DoD FMO must return the draft form, through the DoD or OSD Component FMO, to the DoD or OSD Component OPR for review and acceptance.

(a) If the DoD or OSD Component OPR makes substantial changes to the draft, the OPR must send an e-mail detailing the changes, or a marked-up paper copy, through the DoD or OSD Component FMO to the DoD FMO. After changes are made, a new draft date will be assigned and the form will be forwarded through the DoD or OSD Component FMO to the OPR for acceptance. This process continues until the OPR has resolved all issues regarding the form design and accepts the design as final.

(b) If only minor changes are required on the draft form, the OPR may accept the form with the changes noted. The OPR must send the DoD or OSD Component FMO either an e-mail stating the edits are accepted with a description of the minor changes, or a marked-up form that reflects the desired changes.

(c) If the DoD or OSD Component OPR accepts the draft with no changes, the OPR must send the DoD or OSD Component FMO an e-mail accepting the edits.

(d) The DoD FMP must finalize the artwork and assign a form number and edition date after the DoD or OSD Component FMO forwards the acceptance of the artwork. If the form is a printed item, the DoD FMO must forward camera-ready copies of the finalized form to the using DoD or OSD Component FMOs for printing and distribution. If approved for electronic generation, the FMP must load information regarding the form to the DoD FMP Website.

b. DoD and OSD Component Forms.

The procedures for designing DoD and OSD Component forms are defined by the DoD or OSD Component FMO.

SECTION 7: EXCEPTIONS TO DD FORMS

7.1. GENERAL.

a. Exceptions are approved deviations from the normal prescribed usage of a form. All DD forms must be used as prescribed unless the user obtains an exception. Exception approvals are applicable to the entire DoD or OSD Component.

b. An exception may be for a change to the content, format, or printing of a form. The use of a form's content may also be used in an electronic data interchange format if the form is not authorized for electronic generation.

7.2. FORMS EXCEPTION PROCESS.

A written request or e-mail must define the user's form requirements, state the requested type of exception for the DD form, and provide justification explaining why the exception is needed.

a. The exception request for a DD form must be sent by the requesting DoD or OSD Component office and submitted through its DoD or OSD Component FMO to the DoD FMO.

b. The DoD FMO must review the request to validate the need for the exception for the DD form, verify that the request is correct and complete, and determine if the particular requested exception has already been approved for DoD or OSD Component use.

c. The DoD FMO must forward the determination by e-mail to the requesting DoD or OSD Component FMO.

7.3. ELECTRONIC FORMS EXCEPTIONS.

Electronic versions of DD forms and SD forms may be created only for the forms that have been authorized for electronic use by the DoD FMO.

7.4. DOD OR OSD COMPONENT FORMS.

The procedures for obtaining an exception to a DoD or OSD Component form are established by the DoD or OSD Component.

SECTION 8: SECURITY AND CONTROL OF FORMS

8.1. FORM SECURITY.

Volumes 1 through 4 of DoDM 5200.01 provide information on safeguarding of classified and controlled unclassified information.

a. Blank Forms.

Most blank forms are unclassified. When a blank form is considered classified or contains controlled unclassified information, appropriate security procedures must be followed in the design, printing, distribution, and stocking of the form.

b. Completed Forms.

When a completed form is classified or contains controlled unclassified information, appropriate security procedures must be followed in the routing, distribution, and filing of the form.

8.2. CONTROL OF FORMS.

When it is necessary to maintain control over the distribution of a form, methods of safeguarding and accounting for the form must be employed.

a. Safeguarded Forms.

These forms must be kept in approved storage and access to the form must be restricted to authorized individuals.

b. Controlling Distribution and Use of Forms.

(1) Consecutive or serial numbering of forms facilitates the control and accountability of form distribution and use. The need for consecutively numbered forms must be defined in the printing specifications. Form control requirements may necessitate the allocation of exclusive blocks of serial numbers for DoD or OSD Components that use a particular form.

(2) When a consecutively numbered form series is essential (when there cannot be any missing or duplicate numbers), the printing specifications must stipulate that guaranteed numbering is required. However, assuring the integrity of the form series is costly and should only be specified when necessary.

SECTION 9: DISTRIBUTION OF FORMS

9.1. ELECTRONIC MEDIA.

- a. Official electronic DD and SD forms are loaded and available on the DoD FMP Website, <https://www.esd.whs.mil/Directives/forms/>.
- b. The DoD and OSD Components and Military Services must hyperlink to the DoD FMP Website rather than duplicate or modify DD forms on their own websites. This is to prevent users from retrieving outdated and possibly obsolete forms. Exceptions may be requested by the component OPR and component FMO and forwarded to the DoD FMO.
- c. The public may download DD and SD forms from the DoD FMP Website.

9.2. PAPER MEDIA.

- a. Unless specified, all DD forms must be designed and made available for electronic completion. For forms where electronic completion is not practical, or which require construction features for specialized use such as labels and tags, paper media may be used.
- b. DoD and OSD Component users of DD forms should contact their DoD or OSD Component FMO for information about the Component's procedures for distributing or obtaining physical hard copy forms.
- c. If stipulated under contract, contractors may obtain the necessary forms from the DoD or OSD Component for which they are working. Specific questions pertaining to forms stock or accessibility should be addressed to the DoD or OSD Component FMO.

SECTION 10: CANCELLATION OF FORMS

10.1. DD AND SD FORMS.

Cancellation of DD or SD forms must be effected through the DoD FMO or Component FMO. To cancel a DD or SD form:

- a. The DoD or OSD Component FMO must forward a completed DD Form 67 to the DoD FMO.
- b. The DoD or OSD Component OPR or FMO must notify all DoD and OSD Components regarding the plans to cancel a DD or SD form that it uses. The DoD or OSD Component OPR or FMO must cite why the form is no longer required and identify any replacements for the canceled form.
- c. If all users concur on the cancellation, the OPR, through its DoD or OSD Component FMO, as applicable, must notify the DoD FMO.
- d. If a Component does not concur with the proposed cancellation, the DoD or OSD Component FMO must revisit the form and prescribing issuance to ensure that cancellation of the form can proceed without the non-concurring Component's coordination on the DD Form 67.
- e. The DoD or OSD Component FMO will provide the DoD FMO with its findings and inform the DoD FMO whether the cancelling Component intends to proceed.
- f. The DoD FMO must review the DD Form 67 and process the request for cancellation. All coordinating offices on the original DD Form 67 for approval will be included in Component's cancellation notification.
- g. Upon the DoD FMO's approval for the cancellation of the DD or SD form, a signed copy of DD Form 67 must be forwarded to the DoD or OSD Component FMO and the DoD and OSD Components that use the form listed on the completed DD Form 67.
- h. Cancellation information must be loaded on the DoD FMP Website.
- i. The DoD or OSD Component FMO must notify all of the Component's users that the form has been canceled.

10.2. DOD AND OSD COMPONENT FORMS.

To cancel a DoD or OSD Component form, the OPR for the form must contact its DoD or OSD Component FMO, as applicable, regarding component procedures.

SECTION 11: SFs AND OFs

11.1. GENERAL.

GSA provides guidance and assistance to Federal Agencies for the Standard and Optional Forms Program pursuant to the GSA Handbook. The DoD FMO serves as the DoD primary point of contact, working directly with GSA, on matters relating to SFs and OFs and exceptions to these forms. A DoD or OSD Component OPR establishing or revising an SF or OF must submit a request to its FMO. The originating DoD or OSD Component FMO must submit the forms request package to the DoD FMO, who must validate the package and forward it to GSA for approval. Components must ensure that cancellations of existing DoD forms and conversions to other Federal Agency forms (e.g., GSA, the Office of Personnel Management) are reviewed and approved by the responsible DoD or OSD Component FMO and the DoD FMO.

11.2. CANCELLATION OF SFs AND OFs.

SFs and OFs may only be canceled by the form OPR. To cancel a DoD sponsored SF or OF, the promulgating office must:

- a. Submit a completed SF 152, "Request for Clearance or Cancellation of a Standard or Optional Form," digitally signed by the responsible DoD or OSD Component FMO, that the DoD or OSD FMO will forward to GSA. They must also include information on the disposition of the existing form on the SF 152 and a statement justifying the cancellation.
- b. Announce the cancellation of the SFs and OFs in the Federal Register and state reasons for cancellation.
- c. Forward a copy of the approving SF 152 to the responsible DoD or OSD Component FMO upon GSA approval.

GLOSSARY

G.1. ACRONYMS.

ACRONYM	MEANING
ADN	agency disclosure notice
DA	Department of the Army
DD	Department of Defense (forms only)
DoDD	DoD directive
DoDI	DoD instruction
DoDM	DoD manual
FMO	forms management officer
FMP	forms management program
GSA	General Services Administration
IC	information collections
OF	optional form
OMB	Office of Management and Budget
OPR	office of primary responsibility
PA	privacy advisory
PAS	Privacy Act statement
PII	personally identifiable information
SD	Secretary of Defense (forms only)
SF	standard form
SSN	Social Security number
USPS	United States Postal Service
WHS	Washington Headquarters Services

G.2. DEFINITIONS.

Unless otherwise specified, these terms and their definitions are for the purpose of this issuance.

TERM	DEFINITION
ADN	This disclosure notice is required pursuant to the public protection provisions of Chapter 35, Subchapter I, of Title 44, United States

TERM	DEFINITION
	Code on forms involving collections of information from the public. The public protection provision requires each Federal Agency to display a currently valid OMB control number and inform respondents that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number.
DD form	A form approved by the DoD FMO for use by two or more DoD or OSD Components. The form may be hard copy, soft copy (electronic), or other media (e.g., Excel spreadsheet).
digital signature	Defined in DoDI 8520.02.
DoD FMO	The position responsible for managing the DoD FMP in accordance with DoDD 5110.04. The DoD FMO also serves as the FMO for OSD as a whole (i.e. OSD as a DoD Component).
DoD FMP website	The Internet portal to forms available in DoD, with hyperlinks to DoD and OSD Component forms. This website at https://www.esd.whs.mil/Directives/forms/ is the official site for DD, SD, and DoD-sponsored SFs and OFs.
DoD or OSD Component FMO	The point of contact in the DoD or OSD Component responsible for the DoD or OSD Component FMP
DoD or OSD Component form	A form approved by a DoD or OSD Component FMO for use solely within that DoD or OSD Component.
edition date	The month and year a form is approved and finalized for use. It is displayed after the form designation. For DD forms, the edition date is cited as “MMM YYYY,” e.g. DD Form 67, JUN 2014.”
electronic data interchange	The computer-to-computer exchange of business data in a standardized format between entities.
electronic form	An officially-prescribed set of data residing in an electronic medium that is used to produce a mirror-like image of the officially prescribed form (also identified as a computer-generated form). An electronic form may also contain prescribed fields for collecting data that can be integrated, managed, processed, and transmitted through an organization’s information processing systems (also identified as a

TERM	DEFINITION
	Web-based form). There are two types of electronic forms: one that is part of an automated transaction and one whose image or data elements reside on a computer.
form	A fixed arrangement of captioned spaces designed for gathering, organizing, and transmitting prescribed information quickly and efficiently. This includes forms that are hard copy or electronic (stand-alone or web based screen(s), or other media (e.g., Excel spreadsheet)). A completed form is a record and, as such, must comply with all regulations cited in Parts 102-193 and 102-194 of Title 41, Code of Federal Regulations.
form designation	The alphabetic preface to the form number. It identifies the promulgator of the form. For example, the form designation “DA” indicates the form is promulgated by the Department of the Army.
format	A guide, table, sample, or exhibit that illustrates a predetermined arrangement or layout for presenting data. Most formats are largely narrative in nature and the space needed by the respondents to furnish the desired information varies substantially. Formats are often used where the arrangement and layout of items are simple and flexible and where the number of respondents is comparatively limited.
licensing	The act of approving an information collection. The license authorizes the OPR to collect the approved information from designated respondents. Respondents may be either DoD organizations or personnel, other Federal Agencies, or members of the public.
OF	A form developed by a Federal Agency for use in two or more Federal Agencies and approved by the GSA for non-mandatory government-wide use. This criterion is the same whether the form media is paper or electronic (see Part 102-194.15 of Title 41, Code of Federal Regulations).
OPR	The DoD or OSD Component having responsibility for the overall ownership of a specific form. This term corresponds to the term “promulgating agency” as used in relation to the SF and OF FMP.
PA	A statement that advises a person how information about an individual is being or will be maintained when the full requirements of a Privacy Act statement do not apply.

TERM	DEFINITION
PAS	A statement provided to an individual who is requested to provide information about themselves for inclusion in a system of records, pursuant to the requirements of 5 United States Code § 552a(e)(3) and OMB Circular Number A-108, to enable the individual to make an informed decision on providing the requested information. The elements of a Privacy Act statement include: (1) the authority (whether granted by statute or executive order) that authorizes the solicitation of the information and whether disclosure of such information is mandatory or voluntary; (2) the principal purpose(s) for which the information is intended to be used; (3) the published routine uses to which the information is subject; (4) the effects on the individual, if any, of not providing all or any part of the requested information; and (5) an appropriate citation (and, if practicable, a link) to the relevant system of records notices.
prescribing document or issuance	The written communication that establishes a general requirement for and prescribes the required use of a form by the organizations and individuals identified in the scope of the document or issuance.
public	Individuals, partnerships, associations, corporations, business trusts, legal representatives, organized groups of individuals, states, territories, tribal or local governments, or components thereof. Current employees of the Federal Government are not considered members of the public for the collection of information within the scope of their employment.
safeguard form	A form for which measures and controls are prescribed to protect the form. The form may be sensitive and vulnerable to fraudulent use. Required markings, if any, and security guidelines are set forth in Volumes 1 through 4 of DoDM 5200.01. These markings and guidelines are used during the life cycle of the form.
SD form	A form for use within OSD that is used by more than one OSD Component, the scope of which does not extend beyond OSD. Component FMOs within OSD should identify opportunities for consolidating related SD forms into DD forms. SD forms follow design and coordination procedures outlined in this issuance for DD forms.
SF	A form developed by a Federal Agency for use in two or more Federal Agencies and approved by GSA for mandatory government-wide use. This criterion is the same whether the form media is paper or electronic (see Parts 102-194.10 of Title 41, Code of Federal Regulations).

TERM

DEFINITION

supersession notice

A notice specifying whether the existing stock of a superseded form may be used or is obsolete.

REFERENCES

- Administrative Instruction 15, “OSD Records and Information Management Program” May 3, 2013, as amended
- Code of Federal Regulations, Title 41
- Deputy Secretary of Defense Memorandum, “Disestablishment of the Chief Management Officer of the DoD and Realignment of Functions and Responsibilities,” January 11, 2021
- Deputy Secretary of Defense Memorandum, “Re-establishment of the Assistant to the Secretary of Defense for Intelligence Oversight and the Director of Administration and Management,” January 11, 2021
- Deputy Secretary of Defense Memorandum, “Reorganization of the Office of the Deputy Chief Management Officer,” July 11, 2014
- DoD 4525.8-M, “DoD Official Mail Manual,” December 26, 2001, as amended
- DoD 5400.11-R, “Department of Defense Privacy Program,” May 14, 2007
- DoD Directive 5105.53, “Director of Administration and Management (DA&M),” February 26, 2008
- DoD Directive 5110.04, “Washington Headquarters Services (WHS),” March 27, 2013
- DoD Instruction 1000.30, “Reduction of Social Security Number (SSN) Use Within DoD,” August 1, 2012, as amended
- DoD Instruction 5025.13, “DoD Plain Language Program,” January 23, 2020, as amended
- DoD Instruction 5330.03, “Defense Logistics Agency (DLA) Document Services,” February 08, 2006, as amended
- DoD Instruction 5400.11, “DoD Privacy and Civil Liberties Programs,” January 29, 2019, as amended
- DoD Instruction 7750.07, “DoD Forms Management Program,” October 10, 2014, as amended
- DoD Instruction 8320.02, “Sharing Data, Information, and Information Technology (IT) Services in the Department of Defense,” August 5, 2013, as amended
- DoD Instruction 8520.02, “Public Key Infrastructure (PKI) and Public Key (PK) Enabling,” May 24, 2011
- DoD Instruction 8910.01, “Information Collection and Reporting,” May 19, 2014, as amended
- DoD Manual 5200.01, Volume 1, “DoD Information Security Program: Overview, Classification, and Declassification,” February 24, 2012, as amended
- DoD Manual 5200.01, Volume 2, “DoD Information Security Program: Marking of Information,” February 24, 2012, as amended
- DoD Manual 5200.01, Volume 3, “DoD Information Security Program: Protection of Classified Information,” February 24, 2012, as amended
- DoD Manual 5200.01, Volume 4, “DoD Information Security Program: Controlled Unclassified Information (CUI),” February 24, 2012, as amended
- DoD Manual 8400.01, “Accessibility of Information and Communications Technology (ICT)” November 14, 2017

DoD Manual 8910.01, Volume 1, “DoD Information Collections Manual: Procedures for DoD Internal Information Collections,” June 30, 2014, as amended

DoD Manual 8910.01, Volume 2, “DoD Information Collections Manual: Procedures for DoD Public Information Collections,” June 30, 2014, as amended

General Services Administration Handbook, “Standard and Optional Forms Procedural Handbook,” July 2009

General Services Administration Website, GSA Forms Library¹

OMB Circular No. A-108, “Federal Agency Responsibilities for Review, Reporting, and Publication under the Privacy Act,” December 23, 2016

Public Law 104-13, “Paperwork Reduction Act of 1995,” May 22, 1995 (codified at Chapter 35, Subchapter I, of Title 44, U.S. Code)

Public Law 111-274, “Plain Writing Act of 2010,” October 13, 2010

Public Law 116-283, “William M. (Mac) Thornberry National Defense Authorization Act for Fiscal Year 2021,” January 1, 2021

Secretary of Defense Memorandum, “Disestablishment of the Deputy Chief Management Officers and Establishment of the Chief Management Officer,” February 1, 2018

United States Code, Title 5, Section 552, (also known as the “Freedom of Information Act”)

United States Code, Title 5, Section 552a (also known as the “Privacy Act of 1974”)

Washington Headquarters Services Memorandum, “Approval of Administrative Changes to ODA&M DoD Issuances,” February 1, 2022

¹ Available at <https://www.gsa.gov/reference/forms>