DoD Manual 7750.08

DoD Forms Management Program (FMP) Procedures

Originating Component:	Office of the Chief Management Officer of the Department of Defense
Effective:	February 25, 2020
Releasability:	Cleared for public release. Available on the Directives Division Website at https://www.esd.whs.mil/DD/.
Reissues and Cancels:	DoD 7750.07-M, "DoD Forms Management Program Procedures Manual," May 7, 2008, as amended
Incorporates and Cancels:	Administrative Instruction 86, "OSD Forms Management Program," November 12, 2014
Approved by:	Lisa W. Hershman, Chief Management Officer of the Department of Defense

Purpose: In accordance with the authority in DoD Directive (DoDD) 5105.82, DoDD 5105.53, the July 11, 2014 Deputy Secretary of Defense Memorandum, the February 1, 2018 Secretary of Defense Memorandum, and DoD Instruction (DoDI) 7750.07, this issuance assigns responsibilities and provides procedures for the management and operation of the DoD FMP.

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SECTION 1: GENERAL ISSUANCE INFORMATION

1.1. APPLICABILITY.

This issuance applies to OSD, the Military Departments, the Office of the Chairman of the Joint Chiefs of Staff and the Joint Staff, the Combatant Commands, the Office of the Inspector General of the Department of Defense, the Defense Agencies, the DoD Field Activities, and all other organizational entities within the DoD (referred to collectively in this issuance as the "DoD Components").

1.2. POLICY.

DoD forms will be designed, coordinated, approved, and published in accordance with DoDI 7750.07.

SECTION 2: RESPONSIBILITIES

2.1. DIRECTOR, WASHINGTON HEADQUARTERS SERVICES (WHS).

Under the authority, direction, and control of the Chief Management Officer of the Department of Defense, the Director, WHS:

a. Establishes and manages the DoD FMP.

b. Through the Directives Division in the Executive Services Directorate of WHS, oversees the DoD Forms Management Officer (FMO), who:

(1) Serves as the FMO for OSD as a whole (i.e. OSD as a DoD Component) and provides guidance and assistance to the individual OSD Component FMOs. In this role, the FMO:

(a) Conducts periodic reviews to ensure that DoD and OSD Component FMOs follow the policies and procedures of the DoD FMP contained in DoDI 1000.30 and that these policies and procedures are implemented in each DoD Component's FMPs and related issuances.

(b) Maintains the DoD FMP Website, which serves as the single source of information for forms belonging to and used across the DoD.

(c) Represents the DoD to other government agencies on forms management matters.

(d) Ensures that all forms within DoD are raised to the highest level of forms designation (e.g., ensuring forms qualify as a DoD (DD) form versus a Department of the Army (DA) form when more than one Military Service uses the form).

(2) For DD forms and Secretary of Defense (SD) forms:

(a) Reviews and approves or disapproves all requests to create, revise, or cancel DD and SD forms.

(b) Advises all affected DoD and OSD Components of any new, revised, or canceled DD or SD forms and assigns form numbers and edition dates for all DD and SD forms.

(c) Reviews DoD and OSD Component requests for exception to DD and SD forms before forwarding to DoD or OSD Component FMOs for sponsor approval.

(d) Periodically reviews all active DD forms for continued need, effectiveness, possible consolidation, and conformity to policy and procedures; and eliminates duplicate DD and SD forms.

(e) Designs all DD and SD forms in accordance with DoDI 7750.07 and this issuance, creates or approves the creation of the camera-ready copy of DD and SD forms as needed, and approves the creation of electronic versions of all DD and SD forms.

(f) Confirms that all DD and SD forms asking for personally identifiable information (PII) contain an appropriate Privacy Act statement (PAS) or privacy advisory (PA).

(g) Maintains a database that produces an accurate inventory of all current and canceled DD forms. The database must include the capability to track and report DD forms that request or contain social security numbers (SSNs).

(h) Maintains necessary management information and a historical record for each DD and SD form, including retention of all editions of a form and procedures for maintaining and disposing of these records, including electronic records, in accordance with Administrative Instruction 15.

(3) For the DoD's standard forms (SF) and optional forms (OF), serves as the DoD FMO, in accordance with DoDD 5110.04.

(a) Processes new or revised SF or OF sponsored by the DoD for Federal Register publication.

(b) Obtains approval from the U.S. General Services Administration (GSA) for each new, revised, or canceled SF or OF sponsored by the DoD before the SF or OF is implemented.

2.2. DOD AND OSD COMPONENT HEADS.

The DoD and individual OSD Component heads:

a. Establish and implement a DoD FMP within their component in accordance with DoDI 7750.07 and this issuance.

b. Ensure that their organizations comply with applicable laws and regulations, including, but not limited to, Sections 552 and 552a of Title 5, United States Code, and Public Law 104-13 (codified at Chapter 35, Subchapter I, of Title 44, United States Code).

c. Designate a DoD or OSD Component FMO, as applicable.

SECTION 3: DOD AND OSD COMPONENT FMOS

DoD Component FMOs and individual OSD Component FMOs must:

a. Manage Component FMPs in accordance with DoDI 7750.07 and this issuance.

b. Forward the relevant Component FMO designation document to the DoD FMO for the FMO appointed by the DoD or OSD Component head.

c. Conduct reviews of their respective FMPs.

d. Act as liaison between their DoD or OSD Component and the DoD FMO on all forms matters and provide guidance and assistance to their component users on all forms matters.

e. For their component forms:

(1) Comply with DoDI 7750.07, Section 6 of this issuance, and Public Law 111-274 when designing component forms.

(2) Establish internal procedures for creating, revising, approving, distributing, inventorying, and canceling component forms.

(3) Review active component forms every 5 years for cancellation or possible improvement, including the use of such technological enhancements as web-based data entry, and report the results of the review to the DoD FMO. Update or cancel forms within 10 years of the current edition date.

(4) Ensure that component forms are properly identified by form number and edition date, and are at the highest level of forms designation.

(5) Confirm component forms asking for PII contain an appropriate PAS or PA in accordance with the Privacy Act of 1974, DoDI 5400.11, and DoD 5400.11-R.

(6) Confirm component forms are compliant with DoDI 1000.30.

f. For sponsored DD and SD forms:

(1) Review all requests to create, review, or cancel DD forms before forwarding to the DoD FMO. Confirm that all forwarded requests are complete and correct.

(2) Confirm field names on DD and SD forms comply with guidance contained in DoDI 8320.02, if applicable.

(3) Confirm all DD and SD forms asking for PII contain an appropriate PAS or PA in accordance with the Privacy Act of 1974, DoDI 5400.11, and DoD 5400.11-R.

(4) Notify component users of all new, revised, or canceled DD and SD forms.

(5) Ensure DD and SD forms are approved for electronic use before an electronic version of the form is used within their component.

(6) Ensure DD or SD forms are not replicated on DoD Component websites but reference or otherwise link to the DoD FMP Website.

(7) Confirm DD or SD forms that collect an SSN, in any format, have an SSN justification and are in compliance with DoDI 1000.30.

g. For sponsored SF and OF forms:

(1) Periodically review the SFs and OFs to determine and implement possible forms improvements, consolidations, and cancellations. Report the results of the review to the DoD FMO.

(2) Review all requests to create, revise, or cancel existing SFs and OFs where the DoD Component is the OPR before forwarding request to the DoD FMO.

(3) Notify users of changes, revisions, exceptions, and cancellations of SFs and OFs.

(4) Ensure SFs or OFs are not replicated on DoD Component websites but reference or otherwise link to the DoD FMP Website or the GSA Forms Library Website.

SECTION 4: GENERAL FORMS MANAGEMENT

4.1. TYPES OF FORMS.

Form type is determined by the scope of the form's intended use and indicated by the form designation. The lowest level form has the narrowest scope; the highest level has the broadest. DoD and OSD Component forms are at the lowest level and are used only by the individual DoD or OSD Component. SFs and OFs are at the highest level and are used throughout the Federal Government. Forms must be standardized to their highest level of use so the common functionality of each form is shared and the total number of unique forms used within the DoD community is reduced in accordance with this issuance. As the scope of a form's users broadens, the form will rise to the appropriate level and the form designation will be changed to reflect its scope.

a. SF.

SFs are approved by GSA and required for use by federal agencies. A prescribing directive, regulation, or law mandates the use of an SF. Do not use a DD form or component form in place of an SF unless an exception is first obtained from the disseminating federal agency.

b. OF.

OFs are forms developed for use in two or more agencies and approved by GSA for non-mandatory government-wide use. The DoD may use a DD form or a component form in place of an OF; however, revision to an OF must be approved by GSA before its implementation.

c. DD Form.

DD forms are for use within the DoD and are used by more than one DoD or OSD Component. Component FMOs will explore the possibility of using existing DD forms before creating new component forms. DoD or OSD Component FMOs will identify opportunities for consolidating related forms of the different components into DD forms.

d. SD Form.

SD Forms are for use within OSD and are used by more than one OSD Component, but their scope does not extend beyond OSD. Individual OSD Component FMOs will identify opportunities for consolidating related SD forms into DD forms. SD forms follow design and coordination procedures outlined in this issuance for DD forms.

e. DoD or OSD Component Form.

Component forms are for use within the component indicated by the form designation exclusively. For example, a DA form is for Army use only and an SD form is for use only within OSD. Depending on the size of the component's FMP, there may be several levels of forms below the component level (see Table 1).

Table 1. Defining DoD/OSD Component Forms

IF THE FORM IS:	AND PRESCRIBED BY:	THEN THE FORM IS:
Approved by the DoD or OSD Component FMO	A DoD or OSD Component regulatory publication for use by more than one command in the component	A DoD or OSD COMPONENT form
Originated by a subordinate command of a DoD Component	A command regulatory publication for use by more than one organization in the command	A COMMAND form
Approved by the head of a DoD Component installation	An installation regulatory publication for use by more than one organization on the installation	An INSTALLATION form
Approved for use only within one office of a headquarters, command, or installation	No regulatory publication	An OFFICE form

4.2. PRESCRIBING AND CITING FORMS IN DOCUMENTS AND ISSUANCES.

a. All forms must have a prescribing document or issuance. The prescribing document or issuance must be published or updated before or simultaneously with the approval of each new or revised form. A form must be used as prescribed. Any deviation from the prescribing document or issuance must be approved by the DoD FMO through the OPR and the appropriate DoD or OSD Component FMO. When a form is cited in an issuance, the prescribing document or issuance must be referenced (see Table 2.)

Table 2. DD/SD Forms Authorizing Designation

IF THE FORM IS:	AND PRESCRIBED BY:	THEN THE FORM IS:
Mandatory for use by the DoD or OSD Components	A public law or DoD issuance such as a: • DoD directive • DoD instruction • DoD manual • Directive-type memorandum • Military Standard • Joint Publication	A PRESCRIBED form
Optional for use by two or more DoD or OSD Components	A DoD or OSD Component regulation, manual, or instruction	An ADOPTED form

b. Prescribing documents and issuances citing a form will:

(1) Provide the form designation, number, and title the first time the form is mentioned in the document or issuance (e.g., DD Form 67, “Form Processing Action Request”). Thereafter,

only the designation and number (e.g., DD Form 67) are required unless repeating the title serves to clarify the text.

(2) State the purpose of the form, who prepares it, how to complete it, and when and where to submit it. Forms completion instructions should reference item numbers, and titles exactly as they appear on the form. Illustration of forms or data screens in DoD documents and issuances must have sample entries to show how they are used and a "SAMPLE" overlay.

(3) Identify:

(a) The form location on the Internet (e.g., "An electronic version of DD Form 67 is available on the DoD FMP website at https://www.esd.whs.mil/Directives/forms/.").

(b) The form's location if other than the DoD FMP website, (DD Form XXXX is available upon request to DoD or OSD component name, code).

c. Prescribing documents and issuances will also:

(1) Provide security classification and controlled unclassified information marking guidance and placement for form completion.

(2) Specify those activities or personnel authorized to requisition forms that may be subject to fraudulent use and describe the safeguards required for such forms. They will include instructions for maintaining registers, receipts, and reports of loss or damage for classified, accountable, or safeguarded forms.

(3) Explain where to submit requisitions for the form's supply if the source is other than the normal distribution system (e.g.: "SF 700 is requisitioned from https://www.gsaglobalsupply.gsa.gov or https://www.gsaadvantage.gov."). Explanatory information must include the complete name of the organization and the method for obtaining the form (e.g., mailing address). If the form is available electronically on another government website, provide the uniform resource locator.

4.3. APPLICABLE REGULATIONS AND PROGRAMS.

Public laws, DoD issuances, and DoD programs impact the design and content of a form. The DoD and OSD Component FMOs shall take these requirements into consideration when working with their OPRs upon developing a new form or revising an existing form.

a. DoD Information Collections (IC) Program.

The DoD IC Program is established by DoDI 8910.01. Additional implementation guidance is provided by Volumes 1 and 2 of DoD Manual (DoDM) 8910.01. One of the main functions of the DoD IC Program is to ensure that information collections undertaken by the DoD adhere to all pertinent licensing and approval requirements. Forms are used as instruments to collect information and, depending on their content and purpose, may need to be submitted to the DoD IC Program as part of the clearance process before they may be used to collect information.

Volumes 1 and 2 of DoDM 8910.01 provide specific guidance on the submission process and requirements. The DoD IC Program, by coordinating on the DD Form 67, will provide its determination if a form constitutes an information collection that requires licensing or approval.

b. Privacy Program.

The DoD Privacy and Civil Liberties Programs are established in DoDI 5400.11. Additional implementation guidance is provided in DoD 5400.11-R. One of the primary purposes of the DoD Privacy Programs is to ensure that the DoD collects, uses, maintains, or disseminates PII consistent with the Privacy Act of 1974 and other related authorities.

c. SSN Reduction.

The collection of SSNs must be reduced or eliminated wherever possible. Forms collecting the SSN must properly document the authority for that use (i.e., a written justification for the collection, retention, or use of the SSN is required). Guidance on SSN justification can be found in DoDI 1000.30.

d. United States Postal Service (USPS) Requirements.

Forms that are used as mailers must be designed to meet USPS requirements and specifications and DoD policy. DoD 4525.8-M provides policy and procedures on DoD mail. Mail piece design requirements are available on the USPS Website at: https://about.usps.com/publications/pub600/pub600_006.htm. Changes in the format, content, or construction of a form may lead to improved use, effectiveness, and reduced costs. Suggestions on forms must be submitted through the respective component FMO and approved at the level of designation of the form. For example, suggestions on:

a. DA forms must be processed and approved by the Army.

b. DD and SD forms must be processed and approved by the DoD or OSD Component OPR, the DoD or OSD Component FMO, and the DoD FMO.

c. DoD and OSD-sponsored SFs or OFs must be processed and approved by the DoD or OSD Component OPR and component FMO, and by the DoD FMO for final review and action which includes providing a copy to GSA.

SECTION 5: CREATION OR REVISION OF DD AND SD FORMS

5.1. GENERAL.

Before preparing a request to create a DD or SD form, the DoD or OSD Component OPR or FMO must research the inventory of existing forms to verify that an existing form cannot meet the requirement. The form's OPR must submit a request to establish or revise a DD or SD form to their DoD or OSD Component FMO in accordance with component procedures. The DoD or OSD Component FMO must submit a forms request package to the DoD FMP for review, design, and approval.

a. DD and SD Forms Request Package.

The forms request package must include:

(1) A draft or mock-up of the proposed new or revised form.

(2) A listing of required data elements required for designing the form, if applicable.

(3) A DD Form 67 completed through Block 14.

(4) A uniform resource locator for the prescribing DoD document or issuance or a copy of the document or issuance.

(5) A copy of printing specifications when paper media is required for form completion. DoDI 5330.03 provides guidance for departmental printing services.

b. DD and SD Forms Request Procedures.

(1) Originating DoD or OSD Component.

(a) The OPR will contact its DoD or OSD Component FMO to check the forms inventories to determine if there is a form already available for use. The component FMO must end the request if there is a form available. If not, the forms process begins. The DoD or OSD Component FMO will assist the OPR to develop a forms package, as necessary.

(b) A DD or SD form request package must be assembled. The package includes the elements listed in Paragraph 5.1.a and any additional required documents such as an SSN justification memo or a separate instructions page. The DoD or OSD Component FMO must review the request to determine if it is complete and properly coordinated. A well-designed form is needed for coordination. The DoD or OSD Component FMO will contact the DoD FMP to design a draft to include when coordinating DD and SD forms.

(c) Once the DoD or OSD Component FMO determines that the forms package is complete, they will electronically sign the DD Form 67 in Block 19 and forward to the DoD FMP.

(2) DoD FMP.

The DoD FMP must:

(a) Review the forms package to validate the need and appropriateness of the form and the prescribing authority, and to ensure the DD Form 67 and supporting documents are correct, complete, and properly coordinated. Return incomplete packages to the DoD or OSD Component FMO.

(b) If the package is complete and accurate:

1. Notify the OPR's component FMO and the using DoD or OSD Component FMOs of approval, providing each a copy of the approving DD Form 67.

2. Upload the electronic version of the form to the DoD FMP Website. The DoD FMP Website is the single source of information for DD and SD forms. DD and SD forms must not be duplicated on other DoD or OSD Component websites, intranets, or bulletin boards. This ensures protection from inappropriate manipulation and the currency and accuracy of DD and SD forms.

c. Test Forms.

(1) DoD or OSD Components can choose to test or pilot a form or set of forms to determine effectiveness in obtaining the intended information before making final decisions about content, format, and functionality. To begin, the DoD or OSD Component would submit to the DoD FMO a DD or SD forms package in accordance with the procedure in Paragraph 5.1.b. Test forms carry the suffix "TEST" to differentiate them from final forms.

(2) A test form will not carry the suffix "TEST" for more than 1 year. If testing requires more than 1 year, a request for an extension must be submitted by the DoD or OSD Component FMO to the DoD FMO with justification for the extension and an anticipated test period completion date.

(3) If there is a change to the form during the testing year, a new DD Form 67 is not required. With each change, a new version is created by the DoD FMO and the versions would be tracked as "V1" for version one, "V2" for version two, etc. The forms are labeled with the form number and date created (e.g., "DD Form 67 TEST (V2), OCT 2004").

(4) Once testing is completed and the form is ready to be finalized, a new DD or SD forms package must be submitted to the DoD FMO. The suffix "TEST" and any version number must be removed from the form by the DoD FMO and cancel the test form.

5.2. TRANSFER OF OPR.

If ownership of a DD or SD form transfers from one DoD or OSD Component to another, the receiving OPR must prepare a DD Form 67 with coordination from the relinquishing OPR

requesting responsibility. To complete the transfer, the relinquishing OPR must concur through the DoD or OSD Component FMO and FMP, to the gaining OPR.

5.3. DOD AND OSD COMPONENT FORMS.

Before a request is prepared to create a DoD or OSD Component form, the OPR or the DoD or OSD Component FMO must research the inventory of existing component, DD, and SD forms to verify that an existing form cannot meet the requirement. To create or revise a component form, the OPR must submit a completed DD Form 67 together with other supporting documentation to its DoD or OSD Component FMO in accordance with component procedures and issuances.

SECTION 6: DESIGN GUIDELINES FOR DOD FORMS

6.1. GENERAL.

The effectiveness of a form in capturing data and distributing information is dependent on the design of the form. Forms must be easy to fill in, have a functional layout and a logical sequence to the information they collect. To assist in the design of forms, the guidelines in Public Law 111-274, have been adopted for federal forms design and analysis (see Table 3).

Table 3. Font Styles for DD, SD, and Component Forms

FORM PART	FONT SIZE*	LETTER CASING
Form Title	10 point	UPPERCASE
Agency Disclosure Statement	8 point	Sentence case
PAS or PA Header	8 point bold	UPPERCASE
PAS or PA Body	8 point	Sentence case
Section Titles	8 point bold	UPPERCASE
Captions	8 point	UPPERCASE
Form Number and Edition Date	10 point bold	UPPERCASE
Supersession Notice	8 point	UPPERCASE
*Font size can increase or decrease by a point or two, which must be determined during the design process		

6.2. DOD DESIGN GUIDELINES.

Specific requirements for the design, analysis, and typography must be applied to all DoD forms (e.g., DD Forms, DoD and OSD Component forms). Use the following design guidelines in preparing DoD forms. An exception may be granted when a special requirement or the functional use of the form precludes the use of these standards. See Section 7 for exception procedures.

a. Form Size.

(1) If printed, forms must be designed to 8.5 x 11 inches.

(2) Postcard forms must measure a minimum of 3.5 x 5 inches and a maximum of 4-1/4 x 6 inches.

(3) Two-page forms are not required to be printed front and back unless required by the OPR.

b. Form Borders and Margins.

(1) With the exception of certificates, tags, and labels, the entire body of a form must be enclosed in a lined border.

(2) Use a 1.5 point or 1/48 inch solid border for all four sides.

(3) Unless the form has special requirements, use .5 inch page margins.

(4) Use 1 point or 1/72 inch solid lines for dividing primary sections.

(5) Use hairline type (.5 point) for lines within sections.

c. Form Layout.

(1) Forms must be designed in box style with fillable fields having upper-left captions.

(2) Lay out and number items in sequential order of fill-in. Numbers must be in the upper-left corner immediately before the box caption.

(3) Group common items together on the form. Sections may be used. If several data elements pertain to the same area, individual, etc., use a section. The section title must be set flush-left margin.

(4) In accordance with the Plain Writing Act of 2010, the National Archives and Records Administration requires a separate field or block from the signature field for the signer's printed or typed name.

(5) All mailers or self-mailers must conform to current USPS regulations (e.g., forms requiring window envelopes, labels). DoD mail procedures are available in DoD 4525.8-M.

d. Form Font Styles.

Text fonts are Arial 8-point for captions and Times New Roman 10-point for fillers (see Table 3 for caption font size).

e. Form Title, Number, Date, and Prescribing Authority or Procedural Instructions.

(1) Form Title.

If possible, place the title at the top or top left of the form, centered, inside the border. The title must be brief, specific, and meaningful. Eliminate any unnecessary words, such as "form" or "label." If the form does not have a standard margin, place the title, form number, and edition date in the most logical place.

(2) Form Number and Date on the First Page.

(a) Place the form number and edition date at the bottom left margin, outside the border.

(b) Show the form designation in full capital letters to indicate the scope of use for the form, the type of form and the responsible FMP (e.g., "DD," "DoD/OSD COMPONENT," "COMMAND," or "INSTALLATION").

(c) Place the word "Form" following the form designation, followed by the form number (e.g., DD Form 67). Form numbers are assigned sequentially as new forms are created. Previously assigned form numbers are not reused.

(d) Display the edition date, which consists of the month and year that the edition of the form is approved, as "MMM YYYY," using all uppercase letters for the month and the 4-digit year (e.g., "MAR 2005"). Place it in the lower left corner immediately following the form number.

(3) Form Number and Edition Date on the Second Page.

If the form is to be printed front and back and stocked in paper, put the word "(Back)" after the edition date on the second page (e.g., "DD Form XXXX, MAR 2006 (Back)"). If the form is in electronic media only, use "Page ___ of ___" on the bottom right corner of the form.

(4) Prescribing Authority and Procedural Instructions.

Include the prescribing authority and procedural instructions, with hyperlinks, for the form directly below the title of the form, centered, inside the border. If there are no procedural instructions, such as a manual, only list the prescribing authority.

(a) Prescribed DD Forms.

"The Prescribing Authority for this form is DoDI XXXX. For use of this form see DoDM XXXX."

(b) Adopted DD Forms.

Adopted DD forms are prescribed by the OSD and DoD Component's utilizing the form. The adopted DD Form will include all of the OSD and DoD Component authorities, for example "The Prescribing Authorities for this form is AR XX and SECNAV XX."

f. Suffixes Used in Form Numbering.

(1) Numeric suffixes added to the DD form number show the form series.

(2) Add a "-1" for forms that are first in a series of related forms (e.g., DD Form XXXX-1, XXXX-2).

(3) Add a "/1" for forms that are first in a series of pages associated with a form (e.g., DD Form XXXX/1, XXXX/2).

(4) Other suffixes added to the DD form number indicate the following. Additional suffixes can be added if deemed appropriate by the DoD FMO.

(a) Add the suffix "C" for continuation sheets (e.g., DD Form 67C).

(b) Add the suffix "INST" for instruction pages included with the form.

(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-informationcollections@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 1-4 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 email 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 email 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 1-4 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, U.S. Code on

TERM	DEFINITION
	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 himself or herself for inclusion in a system of records, pursuant to the requirements of 5 U.S.C. § 552a(e)(3) and OMB Circular No. 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, "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 5105.82, "Deputy Chief Management Officer (DCMO) of the Department of Defense," October 17, 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

DoD Instruction 5015.02, "DoD Records Management Program," February 24, 2015, as amended

DoD Instruction 5025.13, "DoD Plain Language Program," January 23, 2020

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

DoD Instruction 7750.07, "DoD Forms Management Program," October 10, 2014

DoD Instruction 8320.02, "Sharing Data, Information, and Information Technology (IT) Services in the Department of Defense," August 5, 2013

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

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 Library[1]

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

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")

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