

# STANDARD AND OPTIONAL FORMS

## PROCEDURAL HANDBOOK

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GSA Office of Governmentwide Policy**

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**Purpose of this Revision:** During the last two years, we have implemented and initiated many improvement efforts toward streamlined, transparent, collaborative services for our internal federal and external public customers. This revision to the handbook continues to implement our foundational regulatory document, 41 CFR 102-194, while embracing the electronic government transformation over the last 10 years with a view toward the vision of transparency, participation, and collaboration in government. Therefore, the contents of chapter III, previously dedicated to electronic forms, is now incorporated throughout the document. To recognize that the majority of our customers reach us by e-mail, we have added a central forms mailbox, [forms@gsa.gov](mailto:forms@gsa.gov). This mailbox is reviewed and responded to each day. This document along with a list of the clearance requests processed during the FY is posted at our forms library at [www.gsa.gov/forms](http://www.gsa.gov/forms). While we hold true to the statement in 41 CFR 102-194 that forms clearance requests be submitted 60 days prior to implementation, we encourage agency forms liaison officers to contact the GSA SF and OF forms team during the early planning stages prior to formal submission to ensure a positive outcome; such as, to clarify necessity, to ensure against duplication, to identify compliance with information collection requirements and regulations, and to design for ease of use and cost effectiveness.

Please let us know what items we should include in future revisions of this Handbook.  
Thank you.

**CHAPTER 1** WHAT IS THE STANDARD AND OPTIONAL FORMS POLICY AND MANAGEMENT PROGRAM?

1. What are the general provisions of this program?
  - a. What is the purpose of this handbook?
  - b. What are the objectives of the SF and OF program?
  - c. For whom is this handbook written?
  - d. What are some common terms used in forms management?
2. What is GSA's role in governing the federal-wide SF and OF program?
3. What are agencies' responsibilities under this program?

**CHAPTER 2** HOW DO I REQUEST THE CREATION, REVISION, CANCELLATION OR EXCEPTION OF A STANDARD OR OPTIONAL FORM?

1. What are the basic procedures to create or revise a Standard or Optional Form?
2. What are the basic procedures to cancel a Standard or Optional Form?
3. What will GSA do with these requests?
4. How do I obtain OMB clearance of a public reporting form?
5. What are the basic procedures to seek exception to a SF?
  - a. What should I think about before requesting an exception?
  - b. How do I request an exception to an existing SF?
  - c. What happens to an exception when the parent SF is revised or cancelled?

**CHAPTER 3** WHAT ELSE SHOULD I KNOW ABOUT THE STANDARD AND OPTIONAL FORMS PROGRAM

1. How can I obtain Standard and Optional forms?
2. Is there any guidance for designing Standard and Optional Forms?

**APPENDIX A** WHAT ARE SOME GUIDELINES FOR DESIGNING STANDARD AND OPTIONAL FORMS?

**APPENDIX B** INSTRUCTIONS FOR COMPLETING THE SF152

**CHAPTER 1**  
**WHAT IS THE STANDARD AND OPTIONAL**  
**FORMS POLICY AND MANAGEMENT PROGRAM?**

1. What are the general provisions of this program?

a. What is the purpose of this handbook? This handbook prescribes the operating procedures for the Standard and Optional Forms Policy and Management Program and specifies GSA's and agencies' responsibilities for developing, issuing, sponsoring, and managing government-wide forms through the Standard and Optional Forms Policy and Management Program.

b. What are the objectives of the Standard and Optional forms program? The program was established to achieve government-wide economies and efficiencies through the development, maintenance, and common use of conventional forms. Furthermore, the program achieves federal goals to replace paper forms with electronic versions to enable electronic completion and transmittal of form data and to reduce the information collection burden to the public to the maximum extent possible.

c. For whom is this handbook written? This handbook applies to all federal agencies engaged in (a) sponsoring, developing, writing, reviewing, and managing Standard and Optional forms.

d. What are some common terms used in forms management?

(1) "Electronic Forms" are those designed using software to create screen-fillable data entry forms often also with the capability of printing, saving, signing, distributing, and tracking electronically.

(2) "Exception" means that an issuing/sponsoring agency authorizes another agency to use the Standard or Optional form with a change to the content or format to fulfill a specific need prescribed by the using agency. "Content exception" means an addition, change to, or deletion of one or more data elements on a Standard or Optional Form. "Printing exceptions" mean changes in the printing specifications of a paper Standard or Optional Form, i.e., changes to the color, size or type of paper; changes in color or type of ink; the establishment of multi-part sets and marginally punched constructions in lieu of cut sheets.

(3) "Form" is a fixed arrangement of captioned spaces designed for gathering, organizing, and transmitting prescribed information quickly and efficiently. A form is considered a record and must comply with all regulations cited in FMR 102-93, 44 USC 3101 and 36 USC 1220.30. Creation of a form means designing and posting a

new form; revision of a form can include minor or major modifications; and cancellation of a form means to discontinue the use of a form entirely.

(4) "Format" is a guide, table, template, sample, or exhibit that illustrates a predetermined arrangement or layout for presenting data.

(5) "Local reproduction" refers to permission to reproduce copies of a form without purchasing it through GSA Global Supply.

(6) "Mirror-like image" means a graphical replica of the official image created by computer software to the best exactness the software will allow. Some variations will be expected in fonts, margins, exact size of entry field.

(7) "Non-form item" means a printed product without spaces for entering information. Some non-form items are part of the Standard and Optional Forms Program so that they may be managed Government wide. Examples of non-form items are envelopes or labels.

(8) "Official image" means the approved image issued for use throughout the Federal government.

(9) "Optional Form" means a form developed by a Federal agency for use in two or more agencies and approved by GSA for non-mandatory Government-wide use.

(10) "Overprinting" refers to the pre-populating of pertinent identical entries (e.g., agency name, address, and accounting codes) in a field or captioned area on a Standard or Optional Form. Overprints are not considered to be exceptions.

(11) "Promulgating agency" means any Federal agency that sponsors the development of a Standard or Optional Form and prescribes the mandatory Government-wide use of that form.

(12) "Standard Form" means a fixed or sequential order of data elements, assigned a Standard Form number, prescribed by a Federal agency through regulation, and approved by GSA for mandatory Government-wide use.

## 2. What is GSA's role in governing the federal-wide Standard and Optional Forms program?

GSA's role was assigned by the Office of Management and Budget (OMB) and is contained in 41 CFR 102-194, Standard and Optional Forms Management Program. In carrying out its responsibilities under the Standard and Optional Forms Policy and Management Program, GSA will:

a. Promote the simplification of Government-wide procedures and improve productivity through encouraging the development and use of Standard and Optional Forms.

b. Provide review of requests for new or revised Standard and Optional Forms. Provide advice and guidance on the design and development of Standard and Optional Forms. Maintain a record of each form's clearance process, assign SF and OF numbers, and post at a centralized site all federal Standard and Optional forms; i.e., [www.gsa.gov/forms](http://www.gsa.gov/forms).

c. Maintain and distribute to all agencies a listing of current agency liaison officers/representatives and current information about all Standard and Optional forms.

### 3. What are agencies' responsibilities under this program?

Based on 41 CFR 102-194, agency heads or their designees' roles include responsibility to:

a. Designate an agency-level Standard and Optional Forms liaison representative and alternate to coordinate all matters relating to Standard and Optional Forms. Notify GSA in writing of each designee's name, title, mailing address, telephone number, and email address. All communications concerning designees shall be forwarded to GSA at [forms@gsa.gov](mailto:forms@gsa.gov).

b. Promulgate Government-wide Standard Forms pursuant to the agency's statutory or regulatory authority. If more than one agency shares the responsibility of statutory or regulatory authority, establish guidelines on which agency (normally or on a rotation system) will sponsor the forms. Establish and issue government-wide procedures announcing the use and availability, revision, or cancellation of the Standard and Optional Forms it promulgates /sponsors. When sponsoring Optional Forms, making sure two or more agencies will use the form.

c. Coordinate with and obtain GSA review for each new, revised, excepted, or cancelled Standard and Optional form, using Standard Form 152, Request for Clearance or Cancellation of a Standard or Optional Form 60 days (if possible) prior to planned implementation. Coordinate the development, revision, or cancellation of Standard and Optional Forms with user agencies as part of form planning. Obtain the prescribing agency's approval for exceptions to Standard and Optional Forms prior to implementation. Provide GSA with an official image of the Standard or Optional Form the agency promulgates prior to implementation.

d. Ensure that all agency electronically generated Standard and Optional Forms conform to the regulation and procedures prescribed by the Office of Management and Budget, this handbook, and regulatory directives as appropriate, such as the Privacy Act, Paperwork Reduction Act, Section 508, etc. In particular,

gain OMB clearance of public-facing forms in accordance with the Paperwork Reduction Act and make forms electronic unless the form is specifically exempted by 41 CFR 102-194.40. Notify GSA of the replacement of any Standard or Optional form by an automated format or electronic form, and whether and why a paper form needs to be stocked.

e. Review annually Standard and Optional Forms that the agency promulgates, including exceptions, for improvement, consolidation, cancellation, and especially for possible automation of any remaining paper forms. Notify GSA when paper forms have been replaced by an automated format or electronic form, and whether and why a paper version of the form continues to need to be stocked. Notify and justify to GSA when a form needs to remain in paper-only format. Notify GSA of any problems with the printing, stocking, and disposal of paper Standard and Optional forms.

f. Establish, issue, and implement internal agency procedures for Standard and Optional Forms. Notify other offices within the agency of all Standard and Optional forms information received. Promote the use of electronic forms, electronic signatures, and electronic transactions within the agency. Ensure that new and revised Standard and Optional Forms and any exceptions do not duplicate forms already available under the Standard and Optional Forms Management Program. Prohibit the use of forms or exceptions which have been canceled.

g. Maintain records documenting all agency-sponsored Standard and Optional Forms actions. Ensure that electronic and paper records are retained and disposed in accordance with agency retention and disposition schedules and the General Records Schedule published by the National Archives and Records Administration (NARA).

**CHAPTER 2.**  
**HOW DO I REQUEST THE CREATION, REVISION, CANCELLATION OR  
EXCEPTION OF A STANDARD OR OPTIONAL FORM?**

1. What are the basic procedures to create or revise a Standard or Optional form?

a. Standard and Optional Forms promote economies and efficiencies through the development, maintenance and use of common forms. These forms eliminate the need to reinvent the wheel because the form you may need could already be available.

- Establish the need for an SF or OF by reviewing the list of [current SF forms](#) and list of [current OF forms](#). Verify that an existing form or automated business process/system doesn't already meet your needs.
- Cite a prescribing directive or regulation that justifies the SF form's creation, change, or cancellation. (No directive or regulation is required for OF.)
- Collaborate with other agencies who may use the form and with potential users to determine their requirements. Follow the procedures of the Privacy Act, Paperwork Reduction Act (PRA), and other regulatory requirements if and as appropriate, such as establishing a system of records notice and obtaining an OMB Control Number, etc.
- Alert via e-mail to [forms@gsa.gov](mailto:forms@gsa.gov) that a form request is forthcoming and consult with the GSA Forms Policy and Management Team during the informal planning stage to ensure a positive and timely outcome, to streamline the process, and to alleviate unnecessary steps or rework.
- When planning and coordination within your agency and with the GSA Forms Policy and Management Team leads to a formal submission, complete [Standard Form 152](#), obtain needed authorizations, and submit the request to [forms@gsa.gov](mailto:forms@gsa.gov); phone: (202) 208-2786, Fax: (202) 501-6269.

b. If the form should not be electronically generated, automated, or locally reproduced without the agency's permission, state this so that GSA will duly note at the Forms Library at [www.gsa.gov/forms](http://www.gsa.gov/forms).

c. Provide an electronic file of the form and include a list of the mandatory data elements for agencies to use as a basis for a form. The Forms Policy and Management Team (GSA/MEC) will help you with electronic formats. In those rare cases that a form will need to be stocked in a paper medium, include either a draft if the Government Printing Office is composing/printing or a camera copy/printed image if GSA Global Supply is stocking. When the form will be locally reproduced, please

place (preferably in the lower left hand corner of the image) the following statement: 'AUTHORIZED FOR LOCAL REPRODUCTION.' Forms can be stocked by Global Supply/GPO or by the issuing agency as local reproduction or printed.

d. Prepare and reference via url or electronic copy of the regulation, order, directive requiring the creation or revision of the form. This document should reference the use of this form. A final draft copy of the issuance is acceptable. The regulation, order, directive citation, such as "41 CFR 102-194" must appear on the form close to the form's number.

e. Prepare and provide an announcement of the new or revised Standard or Optional Forms that will be published in, for instance but not limited to, the Federal Register. The announcement should include:

(1) Form number, title, and purpose;

(2) Instructions of use (i.e., how to prepare, number of copies required, etc.) if not mentioned in the regulation/order/directive.

(3) Implementation date;

(4) Approximate availability date and place of posting, such as, [www.gsa.gov/forms](http://www.gsa.gov/forms), [www.forms.gov](http://www.forms.gov), and/or agency forms website;

(5) For paper, Disposition of present stock (for paper revisions); Supply source (GSA Global Supply, local reproduction, or stocked by originator), when applicable; and National Stock Number, when applicable.

f. Copies of other supporting documents as required, i.e., OMB approval notice at [www.reginfo.gov](http://www.reginfo.gov), etc.

g. Stocking of paper forms requires a commitment from two potential user agencies of their projected annual usage. Do not include the promulgator as one of the two potential users. In the rare event that printing and stocking of paper forms in the GSA Global Supply System is required, include a printing requisition (either SF1 or SF1C) and a copy of the printing specifications. All proofs for printed forms are sent directly to the issuing agency for approval/disapproval. For more information, visit [http://www.gsa.gov/HDR\\_4\\_Prchsng\\_global](http://www.gsa.gov/HDR_4_Prchsng_global) or e-mail to [GSAglobalsupply@gsa.gov](mailto:GSAglobalsupply@gsa.gov).

i. Send the completed SF152 package to [forms@gsa.gov](mailto:forms@gsa.gov).

2. What are the basic procedures to cancel a Standard or Optional form? Follow items a and e above. For item e, only an announcement stating the form is cancelled and why is needed.

3. What will GSA do with these requests? The GSA Forms Policy and Management Team stands ready to work with you during the planning stage of forms design, modification, and cancellation. GSA has the following specific responsibilities for forms requests:

a. Verify that the request contains all relevant information and fulfills purposeful needs of sponsors and potential users. If the request does not meet this initial screen, the Forms analyst will discuss modification or withdrawal of the request with the requestor. (Ideally this conversation occurs during form planning, but can occur at formal submission as well.)

b. Ensure that the request will not result in duplicate forms or a repetitive collection of similar data elements. If the request does not meet this initial screen, the Forms analyst will discuss modification or withdrawal of the request with the requestor. (Ideally this conversation occurs during form planning, but can occur at formal submission as well.)

c. Review form for good design, ease of use, and compatibility for future automation. If the appearance of the form does not meet these criteria, a suggested image will be sent to the promulgating agency. Also review prescribed data elements for flow and clarity for automated forms. See Appendix B for guidance on good forms design. (Ideally this conversation occurs during form planning, but can occur at formal submission as well.)

d. For those that meet the conditions of a through c above, assign an edition date and a form number (for new forms) and notify the requesting agency and GSA's Global Supply.

e. Enter the form in the Standard and Optional Forms Inventory by posting the form image on GSA's Forms Library at [www.gsa.gov/forms](http://www.gsa.gov/forms).

f. Provide notice of the creation, revision, exception, or cancellation to federal agencies' forms liaison officers.

4. How do I obtain OMB clearance of new or revised reporting forms?

Paperwork Reduction Act. Under 5 CFR 1320, Standard and Optional Forms require approval by OMB (44 U.S.C. 3501-3513) when they are used to collect information from the public, or state or local governments, or are the basis of general purpose statistics. Agencies should request and receive OMB approval via [www.rocis.gov](http://www.rocis.gov) under the Paperwork Reduction Act prior to submitting an SF152 package (on new or revised forms) to GSA. When the burden is renewed on existing forms, submit to GSA a current image of the form along with the OMB approval notice. A form does not need to be revised if only the expiration date is being changed.

5. What are the basic procedures to seek exception to a Standard Form?

a. What should I think about before requesting an exception?

Request an exception to a Standard Form only when the agency can demonstrate that the difference in the content, format, or printing specifications of the exception is necessary, advantageous, and cost-effective.

b. How do I request an exception?

(1) An agency's liaison officer should submit a written exception request to the promulgating agency's Standard and Optional Forms liaison officer after an initial, informal alert by phone call or e-mail to the promulgating agency and to GSA's Forms Policy and Management Team. The request should include a justification statement and a copy of the proposed form. The justification statement should explain the reasons for the request, including why the existing Standard or Optional Form cannot be used or is not economical as prescribed, and the proposed alterations or changes and the reasons for each. A copy of this request should also be sent to Forms Policy and Management Team (GSA/MEC) at forms@gsa.gov.

(2) Exception requests will be reviewed and analyzed by the promulgating agency's Standard and Optional Forms Liaison Officer to verify the need for the exception, the completeness of the documentation, compliance with promulgated regulations, and the goals of the Standard and Optional Forms Management Program outlined in this handbook. The promulgating agency should also review the request to limit unnecessary variations of the form for economy of application and, in the case of electronic forms, for need of clearance; and work with the requesting office to clarify all issues.

(3) The promulgating agency shall agree or disagree to the exception requests in writing. The primary response will be to the requesting agency with a courtesy copy to Forms Policy and Management Team (GSA/MEC) at forms@gsa.gov.

(4) When finalized, the following statement must appear on the form (preferably at the bottom): EXCEPTION TO SF XXX APPROVED BY [Issuing agency name][Approval date]. If the exception involves an "accountable" form, you will need to request a block of numbers from GSA Global Supply. For more information, visit [http://www.gsa.gov/HDR\\_4\\_Prchsng\\_global](http://www.gsa.gov/HDR_4_Prchsng_global) or e-mail to GSAGlobalsupply@gsa.gov.

c. What happens to an exception when the Standard or Optional form is revised or cancelled?

(1) Content and format exceptions become void when the affected Standard or Optional form is revised or canceled by the promulgating agency, or when the exception is altered.

(2) Printing exceptions of a Standard or Optional Form are cancelled when a revised form is stocked by GSA's Global Supply.

(3) If the form is revised and the agency still needs their exception, a justification in writing should be sent to the promulgating agency (with a copy to Forms Policy and Management Team at GSA for collaborative resolution).

### CHAPTER 3

## WHAT OTHER INFORMATION SHOULD I KNOW ABOUT STANDARD AND OPTIONAL FORMS?

#### 1. How can I obtain Standard and Optional forms?

a. Standard and Optional Forms are available from the internet on this website: <http://www.gsa.gov/forms> and [www.forms.gov](http://www.forms.gov) at the GSA storefront.

b. General procedures for procuring paper stock of Standard and Optional Forms from the GSA Global Supply can be found in 41 CFR 101-26.2, 101-26.302, and U.S.C. Title 44 26-1. These regulations state that forms stocked by Global Supply must be purchased from them unless otherwise authorized by GSA. For more information, visit [http://www.gsa.gov/HDR\\_4\\_Prchsng\\_global](http://www.gsa.gov/HDR_4_Prchsng_global) or e-mail to [GSAglobalsupply@gsa.gov](mailto:GSAglobalsupply@gsa.gov). Agencies should also refer to internal procedures for ordering GSA Global Supply or agency centrally stocked forms.

c. If you cannot find the form on the internet or at GSA Global Supply, you can contact the Forms Policy and Management Team by email at [forms@gsa.gov](mailto:forms@gsa.gov).

2. Is there any guidance for designing Standard and Optional Forms? Yes. See Appendix A for detailed guidelines and contact the team during planning for specific advice. In general:

a. Pick a font family and stick with it throughout all of your forms. This font should also be common enough for all software and printers to recognize, i.e. Univers, Helvetica, Times, Courier.

b. Keep it simple. Don't use black background with white text captions, or a lot of logos/graphics. Simple forms migrate easier when created with software or scanned. They also load faster from the web.

c. Stay with the box style for capturing data. This method lets the filler clearly see where the information should go.

d. Make image as database friendly as possible. For example, when asking for an address, create a separate item for each of the components (street, city, state, etc.).

## **APPENDIX A**

### **WHAT ARE SOME GUIDELINES FOR DESIGNING STANDARD AND OPTIONAL FORMS?**

This is a suggestion on how to design your forms:

#### **1. Line Rule Weights:**

- |  |        |
|--|--------|
| a. Border (or heavy line):                           | 1/32"  |
| b. Lines dividing primary sections (or medium line): | 1/72"  |
| c. Fill-in boxes (or light line):                    | 1/144" |

#### **2. Fonts:**

- |   |                         |
|---|-------------------------|
| a. Captions:  | 7/8 pt. Universe        |
| b. Section Titles:  | 9/10 pt. Universe       |
| c. Form Title:  | 11/12 pt. Universe Bold |
| d. Form Identification:                                   |                         |
| (1) Agency Name or Acronym:                               | 9/10 pt. Universe Bold  |
| (2) Form Number:  | 9/10 pt. Universe Bold  |
| (3) Form Edition Date:                                    | 7/8 pt. Universe        |
| e. Data or Fill:  | 10 pt. Courier          |
| (Use 6 or 8 pt. font only when necessary due to box size) |                         |

#### **3. Margins:**

- |  |        |
|--|--------|
| a. Form<br>(This is the blank space that surrounds the image): |        |
| (1) Left:  | .4"    |
| (2) Right:   | .4"    |
| (3) Top:   | .5"    |
| (4) Bottom:  | .6667" |
| b. Boxes:<br>(With captions or text):                          |        |
| (1) Left:  | .02"   |
| (2) Right:   | .00"   |
| (3) Top:   | .00"   |
| (4) Bottom:  | .00"   |

If text is centered in box, margins are .00" all the way around.

(Fillable with no caption):

- |             |      |
|-------------|------|
| (1) Left:   | .05" |
| (2) Right:  | .05" |
| (3) Top:    | .00" |
| (4) Bottom: | .00" |

#### 4. Spacing:

- |                               |  |
|-------------------------------|--|
| a. Text (i.e., instructions): | Fixed point size of font                                       |
| b. Boxes:                     |  |
| (1) Single entry:             | Single   |
| (2) Multiple lines:           | Fixed point size of font, if no caption; with caption, single. |

#### 5. Check boxes:

- |                   |  |
|-------------------|--|
| a. Justification: |  |
| (1) Design:       | Left, Top                                      |
| (2) Fill:         | Center, Middle                                 |
| b. Fill:          | One character, automatic tab, checkbox format. |
| c. Margins:       | .00" on each side.                             |

#### 6. Tables: Line rule weights and fonts mentioned above apply to tables.

- |                          |  |
|--------------------------|--|
| a. Margins:              |  |
| (1) Column headings:     | .00" all the way around                    |
| (2) Fill entry:          |  |
| (a) Centered:            | .00" all the way around                    |
| (b) Left/Top or Bottom:  | Left - .05"<br>.00" for remaining margins  |
| (c) Right/Top or Bottom: | Right - .05"<br>.00" for remaining margins |

a. Tables are used if there are only one set of captions. Otherwise each box is a separate fill box.

b. If a table has tiered captions, design table with no column headings. Do captions as separate text boxes.

## 7. Intelligence:

- a. Provide calculations, where possible, in appropriate fields.  
Result of calculation is a "no overwrite" field.

- b. Currency Fields:

- |                           |                     |
|---------------------------|---------------------|
| (1) Length:               | Fixed (number only) |
| (2) Decimal points:       | 2                   |
| (3) Justification (fill): | Right, bottom       |

- c. Naming Conventions:

- (1) Do NOT start or end a field with a number. Numbers can be included anywhere else in the name.
- (2) Do NOT use spaces or strange characters, any punctuation marks or symbols. If needed, the underline character (    ) is the only mark acceptable.
- (3) Length of Field Name: 8 characters (with will allow interaction with any type of database)
- (4) Use descriptive names and type with initial caps. A good rule is adjective/noun.

- d. Dates:

- |             |   |
|-------------|---|
| (1) Format: | MM/DD/YYYY (or<br>YYYYDDMM, if military),<br>automatic fill-in (where<br>applicable (i.e., current<br>date, etc.) |
| (2) Length: | 10 characters (8<br>characters for military)  |

- b. Signature fields: Make sure there is a field or separate block for the signer's name.  
This is a requirement from the National Archives and Records Administration.

## 8. Converting paper to electronic forms.

- a. All forms should be electronic unless it is not practicable to do so, such as, where the form has construction features for specialized manual use or to prevent unauthorized use, or could otherwise risk a security violation, or require unusual production costs.

- b. Design as near to a mirror-like image as the creation software will allow of the officially prescribed form or take the opportunity to make the form more user

friendly with the inclusion only those fields that are necessary for the purpose of the form.

c. Instructions (previously located on the back of paper forms) can be handled (either as part of the image or located through help buttons/lookups).

d. Use electronic form products and services that are based on open standards to the extent possible.

## **APPENDIX B**

### **INSTRUCTIONS FOR COMPLETING SF 152 CLEARANCE**

The following fields are required to be completed on the SF 152:

All actions: Blocks 1, 3, 4, 5, 6, 7, 9, 10a, 11, 14a-134e, 15a-15e, 16b.

New form actions: All of the above mentioned blocks plus 32, 33, 34, 35, 365, 37, 38,39.

Revised form actions: All of the "All actions" and "New form actions" blocks plus 19, 20,21, 22, 23, 24, 25, 26, 27, 28.

Cancelled form actions: All of the "All actions" blocks plus 19, 20, 21, 22, 23, 24, 25,26, 27, 28.