



U.S. General Service Administration

GSA Order: GSA Internal Forms Management Program and Procedures

OAS 1824.1A

Office of Executive Secretariat and Presidential & Congressional Agency Liaison
Services

executive-secretariat@gsa.gov

Purpose:

This Order establishes policies, assigns responsibilities, and provides guidance and procedures governing the creation, use, and maintenance of internally used forms, Standard (SF) and Optional (OF) Forms under the General Services Administration (GSA) Office of Administrative Services (OAS) Forms Management Program.

Background:

The [Standard and Optional Forms Management Program \(FMR \(41 CFR\) 102-194, Federal Acquisition Regulation \(FAR\) Part 53, and General Services Acquisition Manual/Regulation \(GSAM/R\) Part 553](#) establish controls for authorized mandatory use SFs and non-mandatory use OFs, ensuring the consolidation of similar type forms for efficiency. Consistent with these policies, this Order prescribes standard requirements for form creation, revisions, and use.

Applicability:

This Order contains, policy, standards, instructions, and procedures governing the management and use of forms; and applies to:

- a. GSA Services, Staff Offices and Regional Components;
- b. The Civilian Board of Contract Appeals (CBCA) only to the extent CBCA determines it is consistent with the CBCA's independent authority under the Contract Disputes Act and does not conflict with other CBCA policies or CBCA mission; and
- c. The Office of Inspector General (OIG) only to the extent OIG determines it is consistent with the OIG's independent authority under the Inspector General Act, as amended, and does not conflict with other OIG policies or OIG mission.

Cancellation:

This order cancels and supersedes OGP P 1824.1, the Forms Management Program Handbook.

Summary of Changes:

- a. Removed content relating to the Standard and Optional Forms not sponsored by GSA - this will be covered in an external directive.
- b. Reorganized and rewrote content for clarity and usability.
- c. Removed section on the use and level of signatures on GSA forms and GSA-issued Standard and Optional forms (Chapter 1, Part 3, Section 17c).
- d. Removed section on Program Awareness, Training and Evaluation (Chapter 1, Part 4, Sections 1 and 2).
- e. Removed section on approval of other software purchases (Chapter 3, Number 3).

Roles and Responsibilities:

Chief Administrative Services Officer (CASO).

Oversees and ensures agency policy and procedures are in place for GSA's Forms Management Program.

GSA Forms Management Program.

- a. Serves as the forms point of contact for services and staff offices, regional offices, other Federal agencies, and industry on GSA, SFs, and OFs utilization and standardization;
- b. Develops and administers a comprehensive forms management program evaluating all forms (paper and electronic) issued by GSA, SFs and OFs issued by the Administrator for governmentwide or national use, under FMR 102-194;
- c. Prepares procedures for creating forms; ensuring the GSA directive (if applicable) includes a paragraph on distribution and availability; ensuring the forms are current, the numbers and titles are accurate, and non-GSA numbered forms are properly identified with the appropriate prefix, such as SFs or OFs;
- d. Evaluates the overall effectiveness of the Forms Management Program and recommends changes to improve process efficiency;

- e. Maintains copies of all SF and OF request packages for historical preservation;
- f. Creates or participates in management surveys and studies to review forms workflow, data collection methods, and related procedures; implementing processes that improve the efficiency and effectiveness of forms development and the program; and
- g. Conducts and maintains an annual review of the GSA Forms Library; ensuring coordination with GSA offices to confirm the validity and applicability of their forms, which includes consolidating forms or discontinuing use.

Heads of Service and Staff Offices (HSSOs) Program Offices.

- a. Proposes new and revised GSA, GSA-sponsored Standard, and Optional Forms for agency (GSA Forms) or governmentwide (SF or OF) use within their authority to include need and content of the form;
- b. Provides recommendations or information to other offices about forms that are of mutual interest;
- c. Approves all newly created and revised forms recommended by business lines within its purview;
- d. Collaborates with GSA Forms Program to ensure all new and revised GSA forms and GSA-sponsored SFs and OFs conform to the requirements of the GSA Privacy Act Program and the Paperwork Reduction Act when necessary;
- e. Requests comments from stakeholders before seeking approval of new, revised, or canceled GSA, SFs, or OFs;
- f. Ensures technical content of forms is accurate and follows the required laws, regulations, and governing GSA directives, where applicable;
- g. Prepares and submits GSA Form 2192, "Request for Forms Management Services;" a draft of the proposed form; and when required, coordinates with the GSA Forms Management Program for printing and distribution guidance;
- h. Continuously reviews and evaluates program forms for improvement or prompt cancellation;
- i. Serves as liaison with the regions, other Federal agencies, and industry for adequacy and need for issued forms that are under its shared authority;

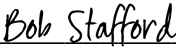
- j. Requests approval from the issuing office for exceptions to or deviations from service or staff office's governed GSA Forms, SFs, or OFs; and
- k. Collaborates with the GSA Forms Management Program on developing, revising, distributing, using, and canceling both printed and electronic versions of forms ensuring electronic forms are approved and available on the GSA Forms Library.

Office of Government-wide Policy (OGP).

OGP's Regulatory Secretariat Division, Office of Acquisition Policy, is responsible for serving as a liaison and interacting with the Office of Management and Budget (OMB) on Paperwork Reduction Act (44 U.S.C. Chapter 35) issues involving:

- (1) The Federal Acquisition Regulation (48 CFR Chapter 1);
- (2) The General Services Acquisition Manual [48 CFR Chapter 5 and internal directive (APD 2800.12B, pp 1 & 2); and
- (3) Other paperwork collections conducted by the General Services Administration including 41 CFR Subtitles C and F.

Signature

DocuSigned by:

BOB STAFFORD
Chief Administrative Services Officer
GSA Office of Administrative Services

11/22/2024
Date

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1. General Issuance Information

The GSA Forms Management Program provides technical guidance on the development, design, and use of forms (printed and electronic) that adhere to Federal compliance standards. This applies to all service, staff, and regional offices who must comply with GSA Forms Management Program policies.

The program's goals are to:

- a. Assist in the creation of efficient, user-friendly forms that meet program office data collection and mission needs;
- b. Ensure all official GSA, Standard Forms (SF) and Optional Forms (OF) meet regulations for use and data collection, and adhere to policies outlined in Section 3.3. "Applicable Regulations and Authorities;"
- c. Establish and issue procedures, within the provisions of [FMR \(41 CFR, Chapter 102, Subchapter G, Part 102-194\)](#);
- d. Ensure the protection, security, and accessibility of all official GSA, GSA-issued SFs and OFs;
- e. Update and create forms to optimize data collection efforts, and eliminate or combine unnecessary, unauthorized, and duplicative forms;
- f. Relate forms to GSA-issued directives (for GSA forms) and governmentwide authorities and regulations (for SFs) governing their use;
- g. Use software and/or systems to automate design, development, and processing of forms;
- h. Promote the conversion of paper-based forms to electronic, fillable forms applications; and
- i. Promote the most advantageous and economical method of producing, procuring, distributing, and replenishing forms.

2. Responsibilities

2.1 Chief Administrative Services Officer (CASO)

Oversees and ensures agency policy and procedures are in place for GSA's Forms Management Program.

2.2 GSA Forms Management Program

- a. Serves as the forms point of contact for services and staff offices, regional offices, other Federal agencies, and industry on GSA, SFs, and OFs utilization and standardization;
- b. Develops and administers a comprehensive forms management program evaluating all forms (paper and electronic) issued by GSA, SFs and OFs issued by the Administrator for governmentwide or national use, under FMR 102-194;
- c. Prepares procedures for creating forms; ensuring the GSA directive (if applicable) includes a paragraph on distribution and availability; ensuring the forms are current, the numbers and titles are accurate, and non-GSA numbered forms are properly identified with the appropriate prefix, such as SFs or OFs;
- d. Evaluates the overall effectiveness of the Forms Management Program and recommends changes to improve process efficiency;
- e. Maintains copies of all SF and OF request packages for historical preservation;
- f. Creates or participates in management surveys and studies to review forms workflow, data collection methods, and related procedures; implementing processes that improve the efficiency and effectiveness of forms development and the program; and
- g. Conducts and maintains an annual review of the GSA Forms Library; ensuring coordination with GSA offices to confirm the validity and applicability of their forms, which includes consolidating forms or discontinuing use.

2.3 Heads of Service and Staff Offices (HSSOs) Program Offices

- a. Proposes new and revised GSA, GSA-sponsored Standard, and Optional Forms for agency (GSA Forms) or governmentwide (SF or OF) use within their authority to include need and content of the form;
- b. Provides recommendations or information to other offices about forms that are of mutual interest;

- c. Approves all newly created and revised forms recommended by business lines within its purview;
- d. Collaborates with GSA Forms Program to ensure all new and revised GSA forms and GSA-sponsored SFs and OFs conform to the requirements of the GSA Privacy Act Program and the Paperwork Reduction Act when necessary;
- e. Requests comments from stakeholders before seeking approval of new, revised, or canceled GSA, SFs, or OFs;
- f. Ensures technical content of forms is accurate and follows the required laws, regulations, and governing GSA directives, where applicable;
- g. Prepares and submits GSA Form 2192, "Request for Forms Management Services;" a draft of the proposed form; and when required, coordinates with the GSA Forms Management Program for printing and distribution guidance;
- h. Continuously reviews and evaluates program forms for improvement or prompt cancellation;
- i. Serves as liaison with the regions, other Federal agencies, and industry for adequacy and need for issued forms that are under its shared authority;
- j. Requests approval from the issuing office for exceptions to or deviations from service or staff office's governed GSA Forms, SFs, or OFs; and
- k. Collaborates with the GSA Forms Management Program on developing, revising, distributing, using, and canceling both printed and electronic versions of forms ensuring electronic forms are approved and available on the GSA Forms Library.

2.4 Office of Government-wide Policy (OGP)

- a. OGP's Regulatory Secretariat Division, Office of Acquisition Policy, is responsible for serving as a liaison and interacting with the Office of Management and Budget (OMB) on Paperwork Reduction Act (44 U.S.C. Chapter 35) issues involving:
 - (1) The Federal Acquisition Regulation (48 CFR Chapter 1);

- (2) The General Services Acquisition Manual [48 CFR Chapter 5 and internal directive (APD 2800.12B, pp 1 & 2); and
- (3) Other paperwork collections conducted by the General Services Administration including 41 CFR Subtitles C and F.

3. General Forms Management

The procedures in this section and subsequent sections apply to developing and using forms, including the different form types (e.g. internally used, SFs, OFs) and the different media in which forms may be available (e.g. paper, electronic).

3.1 Types of Forms

Form type is determined by the scope of the form's intended use and indicated by the form designation. SFs and OFs are used throughout the Federal government. Forms must be standardized to their highest level of use to share the common functionality of each form and to reduce the total number of unique forms used within GSA and governmentwide to accord with this issuance.

- a. Internal forms are forms used inside GSA. These may include SFs or OFs.
- b. Standard Forms – SFs are approved by GSA for mandatory use governmentwide and required for use by Federal agencies.
 - (1) A prescribing directive, regulation, or law mandates the use of an SF.
 - (2) Do not use an alternate form in place of an SF unless an exception is first obtained from the disseminating Federal agency.
- c. Optional Forms – OFs are approved by GSA for nonmandatory use governmentwide and may be developed for use by two or more agencies.

3.2 Prescribing and Citing Forms in Documents

All forms, except OFs, must have a prescribing directive and be used according to that directive. The prescribing directive must be published or updated before or at the same time each new or revised form is approved. A form must be used as prescribed. The designated approving official must approve any deviation from the prescribing directive.

3.3 Applicable Regulations and Authorities

Public law, issuances, and authorities affect the design and content of a form. Service and staff program offices must consider these requirements when working with the Forms Management Program to develop a new or revising an existing form.

- a. [Standard and Optional Forms Management Program \(FMR 41 CFR, Chapter 102 Subchapter G, 102-194\)](#). Establishes controls for consolidating Federal, departmental, and agency forms similar in type and function into SFs for authorized mandatory use, and OFs for authorized, but not required use.
- b. [Federal Acquisition Regulation \(FAR\) Part 53 and General Services Acquisition Manual/Regulation \(GSAM/R\) Part 553](#). Outlines Standard, Optional, and GSA Forms authorized for use in acquisitions.
- c. [Government Paperwork Elimination Act \(Public Law 105-277, 112 Stat 2681\)](#). Promotes the use of electronic forms to meet program office data collection needs.
- d. [Paperwork Reduction Act \(5 CFR 1320\)](#). Outlines maximizing public benefit and practical utility of information collection.
- e. [Electronic Signatures in Global and National Commerce Act of 2000 \(Public Law 106-229\)](#). Outlines signature reviews and security protocols to protect validity of data collection.
- f. [Section 508 of the Rehabilitation Act of 1973 \(29 U.S.C. § 794d\), as amended by the Workforce Investment Act of 1998 \(Public Law 105-220\)](#). Ensures persons with disabilities will be able to read and complete the forms.
- g. [Privacy Act of 1974, as amended \(5 U.S.C. §552a\)](#). Assurance of application of the Privacy Act Statement to forms, protecting personally identifiable information (PII) and other types of data deemed sensitive by this act.
- h. [Federal Requisition System, Standard and Optional Forms \(FPMR \(41 CFR\) 101-26.302\)](#). Outlines [GSA Global Supply](#) requisition procedures for SFs and OFs through [GSA Advantage](#) that cannot be stored electronically or within the GSA Forms Library.

- i. [21st Century Integrated Digital Experience Act \(Public Law 115-336\)](#). Ensures all forms are available in an electronic format as well as in paper format when electronic forms are not feasible.

4. Creating and Revising Forms

Before preparing a request to create a form, the service or staff program office must research its inventory of existing forms to verify that a current form cannot meet the requirement. Upon deciding the type of form to be created or modified, the service or staff program office must prepare a forms request package (Section 4.1 through 4.3).

The program official must approve the request package before the program office can submit it. Once approval is received, submit the completed forms request package to the GSA Forms Management Program for review, design, and final approval.

4.1 Requests for New and Revised Internally Used Forms

To request a new or revise an existing internally used GSA form, the service or staff program office must submit a forms request package to forms@gsa.gov.

- a. The forms request package, at a minimum, must include the following:
 - (1) GSA 2192 “Request for Forms Management Services” that the approving official (division director or above) must sign;
 - (2) A draft or mock-up of the proposed new or revised form;
 - (3) A list of data collection elements required for designing the form. Do not use graphic images unless it is for collecting prescribed data (i.e., street diagram for an accident); and
 - (4) A copy of the directive or regulation that prescribes the use of the form, where applicable.
- b. Internally used forms request procedures.
 - (1) Before submitting a package, ensure all requested documents are reviewed for accuracy and completion;
 - (2) For forms where data is collected only through a database and/or website, include a list of all data collection elements;

- (3) If the originating office prepares the form's mock-up image, submit it in a portable electronic file (such as PDF) for review;
- (4) Provide a copy of the signed directive and/or regulation that prescribed the form's use before releasing the form and/or data collection for use;
- (5) To request printed copies of new or revised forms that cannot be made available electronically, include distribution and special instructions along with a complete mailing address and quantity;
 - (a) Forms that are available electronically may not be printed except in limited circumstances;
 - (b) Exceptions include forms used by field personnel, soldiers, inspectors, and others with limited or no access to web-based forms or forms containing specialty or security sensitive elements that cannot be adapted for the web; and
- (6) For approvals, refer to section 4.7, sub-bullet a.
- (7) Submit the forms request package to the GSA Forms Management Program at forms@gsa.gov.

4.2 Standard or Optional Forms for Other Agencies

When GSA develops and issues an SF or OF for other government agencies' use that is prescribed by a regulation and a shared mutual interest, the service or staff office program must submit a forms request package.

- a. Forms request package and process
 - (1) A completed SF 152, "Request for Clearance or Cancellation of Standard or Optional Form" that the approving official has signed;
 - (2) A draft copy of the proposed new form or revision to an existing form. When the form is part of a new or revised regulation and will be published with the regulation, send the draft to GSA Forms Management Program personnel as soon as possible for preparation of camera copy. Do not include graphic images on forms unless they are used to collect the prescribed data (i.e., street diagram for an accident);

- (3) A copy of the final draft regulation (if applicable). The final regulation must be published in the Federal Register before the form and data collection can be released for use;
 - (4) If applicable, fill out and include a completed SF 1 – Printing and Binding Requisition to the Public Printer of the United States (for printed copies) or SF 1C – Printing and Binding Requisition for Specialty Items (for printed, specialty forms (e.g. SF 97-1, The United States Government Certificate to Obtain Title to a Vehicle); and then
 - (5) Submit the forms request package to the GSA Forms Management Program at forms@gsa.gov.
- b. For approvals, refer to section 4.7, sub-bullet a.

4.3 Standard Forms governed by Interim or Proposed Regulations

When GSA develops forms issued in regulations published in the Federal Register as interim rules with comments or proposed regulations, the service or staff program office must submit a forms request package.

- a. Forms request package and process must include:
 - (1) A completed SF 152, “Request for Clearance or Cancellation of Standard or Optional Form,” and GSA 2192, signed by the approving official;
 - (2) A draft copy of the proposed new form or revision to an existing form. When the form is part of a new or revised regulation and will be published with the regulation, the draft should be sent to GSA Forms Management Program personnel as soon as possible to prepare camera copy;
 - (3) Submit the forms request package to the GSA Forms Management Program at forms@gsa.gov; and then
 - (4) The GSA Forms Management Program will prepare the image copy but will NOT assign the edition date. When the comment period ends and there are no comments, the GSA Forms Management Program assigns an edition date to the form and the issuing office publishes it in

a Federal Register notice. If there were comments, the revision process continues until there is a fully approved form.

- b. Refer to section 4.7, sub-bullet c.

4.4 Privacy Act

Data of a personal nature solicited from individuals and retrieved by a personal identifier falls under the Privacy Act. A statement must appear on the form notifying users as to why the information is collected and how it will be used. If the form falls into this category, the GSA Privacy Act Officer must review and approve the statement before sending it to GSA Forms Management Program personnel. Refer to section 5, sub-bullet k.

4.5 Controlled Unclassified Information (CUI) Labels and Markings

Controlled Unclassified Information (CUI) labels and markings are added when forms collect unclassified but sensitive information. Blank forms must include the following statement at the top of the first page of the form: “**CUI When Filled In.**” See Figures 1 and 2.

4.6 Transfer of Forms Responsibility

If ownership of an SF or OF transfers from one program office to another, the losing and gaining offices must perform the following:

- a. Losing office: Prepares a memo (in memorandum format) transferring the form to the gaining office and submits the memo to the GSA Forms Management Program at forms@gsa.gov.
- b. Gaining office: Ensures there is a continuing need for the transferred form.
 - (1) If a GSA form is no longer needed and the program office is no longer collecting the data prescribed on the form, the gaining office will prepare and submit a GSA 2192 to the GSA Forms Management Program at forms@gsa.gov.
 - (2) If a SF or OF is no longer needed, the gaining office will submit a completed SF 152 package to the GSA Forms Management Program at forms@gsa.gov.

4.7 Forms Approval

Approvals for internally used, SFs, OFs, and public burden forms are as follows:

a. Internally Used Forms

- (1) The GSA Forms Management Program must approve for all proposed new and revisions to existing (paper and electronic) forms, obtained via a completed GSA 2192, and must include a copy of the approved governing directive, where applicable.
- (2) Each GSA service or staff office must obtain the appropriate reviews before submitting forms packages for approval. Refer to Section 2 "Responsibilities" and Section 4.1, subbullet b "Creation and Revision of Forms."

b. Standard and Optional Forms sponsored by other Federal Agencies

- (1) Get GSA Forms Management Program approval by submitting a completed SF 152, governed by [FMR \(41 CFR\) 102-194](#).
- (2) If a service or staff program office requests to change an SF or OF governed by another Federal agency, the sponsoring agency must approve any exceptions before including requested changes.
- (3) Submit exception requests to the GSA Forms Management Program, which will coordinate requested changes with the governing Federal agency.

c. Public Burden Forms

A Public Burden Form is a government form that requires individuals to provide personal information, which can be considered a burden due to the time and effort needed to complete it.

- (1) OMB must approve all new and revised forms that request public information on identical items from 10 or more respondents and that are governed by the Paper Reduction Act.
- (2) GSA's OGP, The Regulatory Secretariat Division, and Office of Acquisition Policy, OGP (MV) works with OMB on Paperwork Reduction Act (44 U.S.C. Chapter 35) issues involving:
 - (a) The Federal Acquisition Regulation (48 CFR Chapter 1);

- (b) The General Services Acquisition Manual [48 CFR Chapter 5 and internal directive (APD 2800.12B, pp 1 & 2)]; and
 - (c) Other paperwork collections conducted by the General Services Administration including under 41 CFR Subtitles C and F.
- (3) The GSA Forms Management Program assists staff and service offices on all requests for new or revised public burden forms before submitting to OMB.
- (a) Service or staff program office submits a forms request package.
 - (b) The Forms Management Program submits the proposed draft to the OGP Regulatory Secretariat and then the OMB Office of Information and Regulatory Affairs for final approval.
 - (c) Once OMB gives final approval, the Regulatory Secretariat will provide the OMB Control Number and/or expiration date to the GSA Forms Management program to include on the form.
 - (d) The GSA Forms Management Program will send the final approved form to the service or staff program office.
 - (e) The Forms Management Program will keep a copy of the form and related correspondence for historical records.
- d. Standard Forms Governed by Interim or Proposed Regulations.

In rare instances, SFs governed by interim regulations may require GSA's Office of Government-wide Policy (OGP), The Regulatory Secretariat Division, Office of Acquisition Policy, OGP and OMB review and approval. OGP and OMB may grant emergency approval for up to six months to allow interim data collection. For guidance on the submission process, refer to section 4.3.

5. Suggested Guidelines for Forms

5.1 Design

To maximize form efficiency, forms must be easy to complete, have a functional layout and a logical sequence in its data capture. To help design forms, the guidelines provided in Public Law 111-274 have been adopted for Federal forms design and analysis. Exceptions may be granted when a special requirement or the functional use of the form precludes the use of these standards. See Table 1.

a. Form Size

- (1) If printed, forms must be designed to 8.5 x 11 inches.
- (2) If the form is only two pages, consider printing front and back unless single-page printing is required.

b. Forms Border and Margins

- (1) Except for labels and titles, 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 (left, right, top, bottom).
- (4) Use 1 point or 1/72-inch solid lines for dividing primary sections.
- (5) Use .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. Put numbers in the upper-left corner immediately before the box caption.
- (3) Group common items together on the form. Use sections. 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 U.S. Postal Service (USPS) regulations (e.g., forms requiring window envelopes, labels).

d. Boxes, Checkboxes, Tables.

Boxes, checkboxes, and tables are effective ways to capture information. Follow the prescribed guidelines for each.

(1) Forms Boxes and Checkboxes. See Table 2.

(2) Tables

- (a) Use tables if there is only one set of captions. Otherwise, each box is a separate fill box.
- (b) If a table has tiered captions, design the table with no column headings. Insert captions as separate text boxes.
- (c) Use line rule weights and fonts mentioned in Table 1.

e. Forms Spacing

- (1) Texts such as instructions, etc., use single spaces.
- (2) Boxes for single or multiple lines, use single spaces.

f. Instructions

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

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

g. Abbreviations and Acronyms

Spell out abbreviations and acronyms the first time they are used and following with the abbreviations or acronyms in parenthesis. After use, use only abbreviations or acronyms. Exceptions may be made for commonly used or widely known abbreviations.

h. Using Illustrations or Graphics on a Form

The use of decorative illustrations or graphics, including official logos, is prohibited unless it has been reviewed and approved by the GSA Forms Management Program. If used, illustrations or graphics may be used only if it serves a functional purpose.

i. Accessibility and 508 Compliance

Forms must be designed for ease of use and contain meaningful captions. It is important to provide clear and concise instructions in order to meet Diversity, Equity, Inclusivity, and Accessibility standards, as well as Section 508 compliance. When designing forms, ensure data elements align with the applicable provisions defined in the [Digital Presence Guidelines: Section 508 Accessibility](#) as well as the [Section508.gov](#).

j. Application of the OMB Control Number and Expiration Date

When collecting information from the public, display the OMB control number and expiration date on the form. As required by OMB, put a border box around the OMB control numbers and expiration dates on forms.

- (1) For forms requiring OMB approval, include an instruction page or a link to a set of instructions written in plain language. Refer to the [Regulatory Secretariat \(ReqSec\) Division](#).
- (2) Display a Paperwork Reduction Act statement also known as a Public Burden Statement or in some instances an Agency Disclosure Notice (ADN) on all forms that require an OMB control number. Display the notice across the top of the form, immediately below the form title along with the OMB control number. Display the statement as shown in Figure 3.

k. Privacy Act Statements (PAS)

If a privacy act statement is required to accord with the Privacy Act of 1974, display it in the following ways:

- (1) On the face of the form immediately below the title or the Paperwork Reduction Act Statement; and
- (2) On the back of the form immediately below the title with the notation, "Please read the Privacy Act Statement on back before completing the form."

5.2 Forms Intelligence and Formatting

a. Format numerical Items as follows:

- (1) Calculations – If data collection requires calculations, use calculations in the designated fields. Result of a calculation is a "no overwrite" field.
- (2) Currency – Is applied when the field is part of a total
 - (a) Length of the field is fixed - number only
 - (b) Decimal points if fixed at two (2) characters

- (c) Justification (fill) is right, bottom
 - (3) Dates – Format the date field as the 4-digit year, 2-digit month, and 2-digit day, “YYYYMMDD” with an eight-character fixed field length.
 - (4) Date of Birth – 4-digit year, 2-digit month, and 2-digit day, “YYYYMMDD” with an eight-character fixed field length.
 - (5) Social Security Number – Format the SSN field as a numeric fixed field 11 characters in length, “NNN-NN-NNNN”.
 - (6) Telephone Numbers – Format the field as 3-digit area code, 9-digit number, and 4-digit extension such as (NNN) NNN-NNNN Ext. NNNN.
- b. Naming Conventions – Do not use spaces and only use characters, punctuation marks, or symbols that are accepted by the designated forms software.
 - c. Names – Make First Name, Middle Name or Initial, and Last Name separate fields.
 - d. Signature Fields
 - (1) The National Archives and Records Administration requires a separate block or field for the signer’s name.
 - (2) If digital signatures are allowed, coordinate with the GSA Forms Management Program to ensure that once digital signatures are applied, specific fields are locked and uneditable.
 - e. GSA Reference – Heads of Service and Staff Offices and Regions Format
 - (1) Capitalize the first letter in “Service” and “Staff Office” when referring to a GSA Service or Staff Office.
 - (2) Capitalize the first letter in “Region” or “Zone” when referring to GSA Regions or Zones.

6. Canceling Forms.

To cancel an existing GSA, SF or OF, the responsible program office prepares and submits the following to the GSA Forms Management Program at forms@gsa.gov:

- a. A completed SF 152, “Request for Clearance or Cancellation of a Standard or Optional Form” or a GSA 2192 for GSA Forms digitally signed by the approving official;
- b. A brief statement justifying the cancellation; and

- c. A copy of the final regulation canceling the requirement to collect the data if the form is an SF or GSA Form.

7. Distribution of Forms.

7.1 Electronic Forms.

- a. The GSA Forms Management Program must approve all electronic SF/OF forms and electronic collection of data. All approved forms are available on gsa.gov in the [GSA Forms Library](#).
- b. The GSA Forms Management Program uses software supported by GSA for creating, revising, and processing forms. Using unauthorized electronic form images or data collection is prohibited.
- c. All electronic forms images generated by other software and not created by the GSA Forms Management Program must be approved before being used.
 - (1) Provide GSA Forms Management Program with the name of the software used to create the image, a copy of the electronic form, or website location.
 - (2) GSA Forms Management Program will coordinate with the responsible issuing office and/or agency, and notify the office and/or agency requesting approval (if different than the issuing office or agency) of the decision.
 - (3) Coordinate using other software to create alternate versions of GSA, SFs, or OFs with the GSA Forms Management Program before publication.

7.2 Paper Forms.

Unless specified, all forms must be designed and made available for electronic completion. For forms where electronic completion is not practical, accessible, or which require construction features for specialized use such as labels and tags, paper forms may be used.

7.3 Ordering and Printing.

- a. To order printed GSA internally used forms, contact the GSA Forms Management Program at forms@gsa.gov. Include the form number, title,

quantity, and complete mailing address along with any distribution and special instructions.

- b. Print-on-demand cutsheet forms (i.e., carbon copy) are electronically stored on the [GSA Forms Library](#). The GSA Forms Management Program will identify cut sheet forms authorized for local reproduction. As a rule of thumb, if the form does not require special features (e.g., watermarks, microprinting, glue ribbons for sealing, etc.), then the form can be provided electronically in the [GSA Forms Library](#) and printed locally.
- c. SFs and OFs may be ordered through GSA Advantage. Most are available in the [GSA Forms Library](#). However, they can also be obtained from the Federal Acquisition Service, GSA Global Supply by:
 - (1) Telephone: 1-800-525-8027; or
 - (2) Online: Go to <https://www.gsaadvantage.gov> and enter the National Stock Number (NSN) or Form number in the search box.
- d. Low Demand Forms Assessment: If the Federal Acquisition Service, GSA Global Supply deems an SF or OF as “low demand” (not producing annual revenue of \$5,000 or more), the GSA Forms Management Program will request action on form maintenance. The issuing office will:
 - (1) Determine the form is viable, and the issuing office will maintain stock and distribute;
 - (2) Determine the form is viable and authorize for local reproduction (electronic); or
 - (3) Determine the form is obsolete and cancel.

Direct inquiries on ordering and printing SF/OFs, forms available on GSA Advantage, or any questions regarding information in this document to the GSA Forms Management Program at forms@gsa.gov.

Figures

Figure 1. CUI Control Marking

CUI Control Marking

CUI when filled in

Standard Form 86
Revised December 2010
U.S. Office of Personnel Management
5 CFR Parts 731, 732, and 735

Form approved:
OMB No. 3206-0005

QUESTIONNAIRE FOR NATIONAL SECURITY POSITIONS

PERSONS COMPLETING THIS FORM SHOULD BEGIN WITH THE QUESTIONS BELOW AFTER CAREFULLY READING THE PRECEDING INSTRUCTIONS.

Figure 2. CUI Control Marking

LEGEND:														SUGGESTED CODES: CUI when filled in						TOUR OF DUTY																			
■ = Last day of Month		A = Annual Leave		S = Sick Leave		E = Excused		W = Absent Without Leave		CE = Compensation Time Earned		OT = Overtime																											
H = Holiday		M = Military Leave		R = Restored Leave		D = Award Leave		L = Leave Without Pay		CU = Compensation Time Used		C = Continuation of Pay for Traumatic																											
LEAVE EARNED	LEAVE CATEGORY	PER PAY PERIOD		PER LEAVE YEAR		*10 hours pay period ending 12/28.						ANNUAL LEAVE		SICK LEAVE																									
		ANNUAL	SICK	ANNUAL	SICK	CARRY-OVER		CARRY-OVER																															
4		4	4	104	104	OPENING BALANCE		OPENING BALANCE																															
6		6*	4	180	104	THIS PAY PERIOD EARNED		THIS PAY PERIOD USED		BALANCE		THIS PAY PERIOD EARNED		THIS PAY PERIOD USED																									
8		8	4	208	104	EARNED		USED		BALANCE		EARNED		USED																									
PAY PERIOD		SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY																								
3	1/14 - 1/27		H																																				
4	1/28 - 2/10				■																																		
5	2/11 - 2/24									H																													
6	2/25 - 3/9					■																																	
7	3/10 - 3/23																																						
8	3/24 - 4/6																																						

Figure 3. Paperwork Reduction Act Statement

This information collection meets the requirements of 44 USC § 3507, as amended by section 2 of the Paperwork Reduction Act of 1995. You do not need to answer these questions unless we display a valid Office of Management and Budget (OMB) control number. The OMB control number for this collection is 9000-0157. We estimate that it will take 29 hours (25 hours for part 1 and 4 hours for Part 2) to read the instructions, gather the facts, and answer the questions. Send only comments relating to our time estimate, including suggestions for reducing this burden, or any other aspects of this collection of information to: U.S. General Services Administration, Regulatory Secretariat Division (MVCB), 1800 F Street, NW, Washington, DC 20405.

Tables

Table 1. Forms Font Styles

FORM PART	*FONT SIZE	LETTER CASING
Form Title	11/12 point Arial Bold	UPPER CASE
Section/Part Titles	9/10 point Arial Bold/Regular	UPPER CASE
Captions	9/10 point Arial	UPPER CASE
Form Identification		
(1) Agency Name or Acronym	9/10 point, Arial Bold	UPPER CASE
(2) Form Number and Edition Date	11/12 point, Arial Bold	UPPER CASE
(3) Agency Disclosure Statement	9/10 point, Arial	Sentence ease
(4) Data or Fill	9/10 point Arial,	Sentence ease
**Agency Disclosure Notice (ADN)	9/10 point	Sentence ease
Privacy Act Statement (PAS) (Header)	9/10 point, Arial Bold	UPPERCASE
Privacy Act Statement (PAS) (Body)	9/10 point	Sentence ease
<i>*Font size may increase or decrease by one or two points which is determined during the design process</i>		
<i>**Preferred by some agencies</i>		

Table 2. Boxes and Checkboxes

FORMS BOXES AND CHECKBOXES			
Type	Justification	Margin	Text
Box (with caption/text)	Left	.00 (left/right/top/bottom)	N/A
Check Box (fill)	Center	.00 (left/right/top/bottom)	One Character

Table 3. Table Structure

TABLE STRUCTURE	
Type	Margin
Column Heading	.00 (left/right/top/bottom)
Fill Entry	
(a) Centered	.00 (left/right/top/bottom)
(b) Left/Top or Bottom	.05 (left) .00 (right/top/bottom)
(c) Right/Top or Bottom	.05 (right) .00 (left/top/bottom)

Appendix A - Terms and Definitions

1. **Accountable Form:** Serial numbered form that denies access to unauthorized persons by a governing directive and provides record of receipt, transfer, loss, cancellation, or destruction (example: SF Form 98-1). Forms that contain protected elements such as watermarks, microprinting, and ribbons.
2. **Camera Copy:** Refers to the final stage of text, tables, and illustrations of a manuscript and includes proper formatting.
3. **Common Use Form:** A form used by two or more Central Office services or staff offices, and in the regions. This type of form needs a 50/50, 55/45, 60/40, or 65/35 usage ratio to qualify as common use.
4. **Cutsheet form.** Single sheet of paper printed on one or both sides of the sheet. An example is carbon copy forms.
5. **Digital signature:** An electronic signature based on encryption methods such that the identity of the signer and the integrity of the data can be verified.
6. **Edition Date:** This is the version of the form. The initial version will only have a date next to the form number (e.g. GSA 123 6/2023). A revised form will have the symbol REV. to indicate the form has been revised [e.g. GSA 123 (REV. 6/2023)].
7. **Electronic form:** An electronic SF or OF is an officially prescribed set of data residing in an electronic medium that is used to produce a mirror-like image or as near to a mirror-like image as the creation software will allow of the officially prescribed form.
8. **Electronic signature:** Digital equivalent of a handwritten signature executed, adopted, or authorized by an individual to be the legally binding equivalent of the individual's handwritten signature.
9. **Exceptions to Standard forms:** An issuing or sponsoring agency approved a change to the content, format, or printing of a SF.
10. **External use form:** Form used by other Federal agencies, industry or the public in which a transaction is only received by GSA.
11. **Form:** Fixed arrangement of captioned blank spaces designed for gathering, processing, transmitting, and approving prescribed information quickly and efficiently. A Federal government form is considered a record and complies with

all regulations cited in Federal Management Regulation (FMR) Part 102-94, (41 CFR 102.194), 44 U.S.C. § 3101, and 36 U.S.C. § 1220.30.

12. **Form Images:** Is a non-functional picture of a complete, electronic form.
13. **Form Designation:** Refers to the form type such as Standard Form (SF) or Optional Form (OF).
14. **Graphic Images:** Images embedded in electronic forms (e.g., arrows, roadways, logos, etc.)
15. **GSA form:** Form prescribed and used by the General Services Administration.
16. **Internal use form:** A form solely used by GSA and its offices.
17. **Issuing Office:** The GSA program office sponsoring the form and responsible for maintaining the collected data.
18. **New form:** A form created for the first time and approved by the GSA Forms Management Program.
19. **Optional Form (OF):** A form developed by a Federal agency for use by two or more agencies and approved by GSA for non-mandatory governmentwide use. See FMR 102-194.30 for developing and procuring OFs.
20. **Other Federal agency form:** A form numbered and issued by another Federal agency for use by GSA and other agencies. Examples: Treasury Form W-2, Wage and Tax Statement, and OGE 450, Confidential Financial Disclosure Report.
21. **Public use form:** A form completed by non-government entities (the "Public") that follows Federal laws and regulations.
22. **Prescribing Directive:** An official policy document authorizing the creation, revision, and use of GSA, SFs or OFs.
23. **Revised form:** A form with changes in content, content arrangement, format, size, or any other characteristic.
24. **Specialty form:** A form usually produced by special manufacturing equipment beyond the capability of ordinary printing equipment. Some of the more commonly used terms to designate specialty forms are: chemical transfer paper snap out sets, optical or mark read scannable forms, labels, tags, or continuous marginally punched sets.

25. **Standards:** The use of design and specifications to make forms easier to use and understand. The use of standards results in canceling unnecessary forms, combining several forms used for the same purpose, or improving necessary forms. When the maximum use of standards is accomplished, increased productivity and improved use of resources may greatly exceed the cost of the form.
26. **Standard Form (SF).** An SF is a fixed or sequential order of data elements, prescribed by a Federal agency through regulation, approved by GSA for mandatory use, and assigned an SF number. This criterion is the same whether the form resides on paper or purely electronic. See FMR (41 CFR) 102-194 for developing and procuring SFs.

Appendix B - Forms Referenced

FORMS REFERENCED		
Form Number	Form Title	Location
GSA 2192	Request for Forms Management Services	GSA Forms Library (gsa.gov/forms)
SF 1	Printing and Binding Requisition to the Public Printer	GSA Forms Library (gsa.gov/forms)
SF 1C	Printing and Binding Requisition for Specialty Items	GSA Forms Library (gsa.gov/forms)
SF 152	Request for Clearance or Cancellation of a Standard or Optional Form	GSA Forms Library (gsa.gov/forms)

Appendix C - Classes of Forms

CLASSES OF FORMS		
Type	Reference	Clearance Office
GSA Internal Forms (Agency Wide)		
Public Use Report	Paperwork Reduction Act (5 CFR 1320)	GSA Regulatory Secretariat and OMB Office of Information and Regulatory Affairs
Standard (SF) and Optional Forms (OF)		
Public Use Report	Paperwork Reduction Act (5 CFR 1320)	GSA Regulatory Secretariat and OMB Office of Information and Regulatory Affairs
Standard Forms Governed by Interim or Proposed Regulations		
Public Use Report	Paperwork Reduction Act (5 CFR 1320)	GSA Regulatory Secretariat and OMB Office of Information and Regulatory Affairs

Certificate Of Completion

Envelope Id: 781DF29B407B4CD2AF1040BDC1A4521B	Status: Completed
Subject: Complete with Docusign: CC049466 OAS 1824.1A Internal Forms Policy and Procedures BS Edits.docx	
Source Envelope:	
Document Pages: 30	Signatures: 1
Certificate Pages: 2	Initials: 0
AutoNav: Enabled	Envelope Originator:
Envelopeld Stamping: Enabled	Marcus Hardy
Time Zone: (UTC) Dublin, Edinburgh, Lisbon, London	1800F F St NW
	Washington DC, DC 20405
	marcus.hardy@gsa.gov
	IP Address: 96.255.152.142

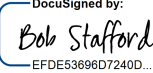
Record Tracking

Status: Original	Holder: Marcus Hardy	Location: DocuSign
11/22/2024 8:48:03 PM	marcus.hardy@gsa.gov	
Security Appliance Status: Connected	Pool: FedRamp	
Storage Appliance Status: Connected	Pool: US General Services Administration	Location: DocuSign

Signer Events

Bob Stafford
bob.stafford@gsa.gov
Chief Administrative Services Officer
US General Services Administration
Security Level: Email, Account Authentication (None)

Signature

DocuSigned by:

EFDE53696D7240D...
Signature Adoption: Pre-selected Style
Using IP Address: 173.73.227.81

Timestamp

Sent: 11/22/2024 8:50:07 PM
Viewed: 11/22/2024 8:50:48 PM
Signed: 11/22/2024 8:50:51 PM

Electronic Record and Signature Disclosure:
Not Offered via DocuSign

In Person Signer Events

Signature

Timestamp

Editor Delivery Events

Status

Timestamp

Agent Delivery Events

Status

Timestamp

Intermediary Delivery Events

Status

Timestamp

Certified Delivery Events

Status

Timestamp

Carbon Copy Events

Status

Timestamp

Julia Cronin
julia.cronin@gsa.gov
Security Level: Email, Account Authentication (None)

COPIED

Sent: 11/22/2024 8:50:53 PM
Viewed: 11/25/2024 5:36:02 PM

Electronic Record and Signature Disclosure:
Not Offered via DocuSign

Witness Events

Signature

Timestamp

Notary Events

Signature

Timestamp

Envelope Summary Events

Status

Timestamps

Envelope Sent	Hashed/Encrypted	11/22/2024 8:50:07 PM
Certified Delivered	Security Checked	11/22/2024 8:50:48 PM
Signing Complete	Security Checked	11/22/2024 8:50:51 PM
Completed	Security Checked	11/22/2024 8:50:53 PM

Payment Events

Status

Timestamps