

	County of Sacramento Mental Health Division Adult Mental Health Services	Policy No.	08-01
		Issued Date	05-30-07
		Revision Date	11-19-07
AREA: Administration	TITLE: Forms Management		
Approved by:	Approved By:		
Mike Waldron ASO II	Sandy Damiano, PhD Chief		

I. POLICY

The Adult Mental Health Services staff may request to create, modify or delete forms using the process outlined in this policy.

II. PROCEDURES

A. Form Guidelines:

1. Any staff member may initiate a request for a new form, revision or deletion by completing a Form Request and attaching a sample of the form.
2. Forms will be prepared with a consistent font type and format.
3. Forms will be available in hard copy and electronically posted to the Adult Mental Health Intranet and Internet websites, as indicated.

B. Forms Clerk Duties:

The designated Forms Clerk will:

1. Process requests to create or modify a form. Processing includes tracking, design, proofing, maintaining the database and forwarding the form through the appropriate decision making staff.
2. Ensure adherence to form guidelines and issues a form number.
3. Maintain a central binder comprised of hard copies of all current forms.
4. Notify staff of the approved release of new or revised forms after approval.
5. Place new form name and number on the "Approved Forms" log.
6. Forward a copy by email to the Secretary and website Point of Contact (POC).

C. Approval Process:

1. Initial requests for a form creation or modification must be reviewed and initially approved by the requestor's supervisor/manager prior to submission to the Forms Clerk.

2. The Forms Clerk emails a draft of the new form to the Forms Committee members for approval, revision or recommendations and notes the date on the 'Pending Forms' log.
3. The Forms Committee will notify the Forms Clerk of approval or revisions.
4. The Forms Clerk will update the Forms Log as follows:
 - a. If the form is approved, it will be moved from the Pending Forms Log to the Approved Forms Log.
 - b. If there are changes to the form, the Forms Clerk will update the "Status" column on the Pending Forms Log, make the changes and resubmit the form to the Forms Committee members.

D. Dissemination:

1. The Forms Clerk notifies managers and supervisors of the form approval and places a hard copy in the central forms binder.
2. The Secretary is responsible to place a hard copy of the form with the policy & procedure in the office binder and in the Chief, Adult Mental Health Services binder when indicated.
3. The web POC places the form and the policy & procedure on the Adult Mental Health Intranet and Internet websites.

Form References:

[Form Request \(Form AMH-009\)](#)

[Forms Log \(Form AMH-013\)](#)

IV. REFERENCES	Related Policies & Procedures	State/Federal Codes/Other References
	N/A	N/A
V. CONTACTS	Name	E-mail
	Linda Fuller	fullerl@saccounty.net
VI. SCOPE	<input checked="" type="checkbox"/> Mental Health Staff <input type="checkbox"/> Mental Health Treatment Center <input type="checkbox"/> Specific grant/specialty resource	<input type="checkbox"/> Adult Contract Providers <input type="checkbox"/> Children's Contract Providers