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Communications and Information

FORMS MANAGEMENT PROGRAM

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AFI 33-360, Volume 2, 27 June 2000, is supplemented as follows:

This supplement applies to all Air Education and Training Command (AETC) personnel, who prepare, manage, review, certify, approve, or use forms. This supplement establishes AETC's policy and procedures for use in conjunction with the basic publication. This publication does not apply to Air Force Reserve Command (AFRC) and Air National Guard (ANG) units. Maintain and dispose of records created as a result of processes prescribed in this publication according to AFMAN 37-139, *Records Disposition Schedule* (will become AFMAN 33-322, Volume 4).

SUMMARY OF REVISIONS

This revision adds major command forms management support to 479 FTG (paragraph **1.4.1.1.**); authorizes 479 FTG to designate individual to administer local forms management program (paragraph **1.7.**); authorizes e-mail as means to forward final form to office of primary responsibility for approval (paragraph **1.8.3.**); establishes HQ AETC forms review as yearly (paragraph **4.4.**); identifies locations that list new, added, revised, and obsolete forms (paragraph **4.4.1. (Added)**); realigns paragraph numbers of prescribed forms (paragraphs **6.3.12. (Added)** - **6.3.16. (Added)**)—AETC Form 7, **Review of Proof Copy**; AETC Form 50, **Appointment Slip**; AETC Form 109, **Certificate of Recognition**; AETC Form 163, **Distinguished Visitors Checklist**; AETC Form 579, **Analysis of Form**. A “|” indicates revised material since the last edition.

1.1. AETC operates under a centralized forms management program. All forms developed by subordinate activities are classed as headquarters forms. When a single office uses a form, place the OPR's office symbol immediately after the form's date.

| 1.4. The command publishing manager (Policy and Management Section [HQ AETC/SCMY]) serves as the command forms manager.

1.7.7. Ensure the DD Form 67, **Form Processing Action Request**, is signed by the publications approving authority (according to established local procedures). Ensure all requests for forms are routed through the base or activity records management function for coordination (item 14 of DD Form 67) before approval or publication.

1.7.20. (Added) Publishes a forms index (to include office forms) at least once a year. Send one copy of the index to HQ AETC/SCMY.

1.8. (Added) Forms Monitors. For activities that receive forms management support from HQ AETC/SCMY the following procedures apply:

1.8.1. The forms monitor:

1.8.1.1. Ensures the request (DD Form 67) is properly completed and is signed by the publications approving authority (according to established local procedures). Returns the request to the originator for correction, if necessary. Ensures all requests for forms are routed through the base or activity records management function for coordination (item 14 of DD Form 67) before approval or publication.

1.8.1.2. Refers to the command internet site, <http://www.aetc.randolph.af.mil/im>, to determine if the proposed form duplicates an existing higher headquarters form. If the proposed form is determined to be unnecessary, returns it to the originator with proper comments.

1.8.1.3. Coordinates the request with the base or activity records management function and other interested activities before submitting it to HQ AETC/SCMY.

1.8.1.4. Ensures forms affected by the Privacy Act are processed according to paragraph 3.10 of the basic instruction.

1.8.1.5. Assigns a request number, enters it in the blank space under Item 1 of DD Form 67, and records it for tracking purposes (a general purpose form or spreadsheet may be used). The request number may consist of the last two numbers of the calendar year followed by a number or numbers in numerical sequence (for example, 00-1, 00-2, 00-10, etc.).

1.8.1.6. Forwards DD Form 67, a legible draft of the proposed form, a draft of the prescribing publication (if applicable), and other supporting documents, as necessary, to HQ AETC/SCMY. (**NOTE:** Forms monitors may inquire about their request at any time while it is at HQ AETC/SCMY for processing. It normally takes between 2 and 10 workdays to process a request unless unforeseen circumstances, such as command studies, delays with the AETC OPR, etc., occur. When delays occur, the forms analyst responsible for the project will telephone or e-mail the forms monitor.)

1.8.2. HQ AETC/SCMY analyzes the proposed form for essentiality and cost effectiveness and, if necessary, uses AETC Form 579, **Analysis of Form**, to coordinate with the HQ AETC OPR. If the proposed form is:

1.8.2.1. Being considered for possible command-wide adoption, notifies the forms monitor and annotates the request accordingly. A command study is generated to determine the possibility of developing a command form. After completing the study, HQ AETC/SCMY informs the originating activity of the findings.

1.8.2.2. Determined to be nonessential, disapproves the request and returns it to the originating activity.

1.8.2.3. Approved for local use, assigns it a number, designs the form, completes DD Form 67, and returns it to the originating activity.

1.8.3. Upon receipt of the approved form, the forms monitor completes AETC Form 7 or e-mail, attaches a copy of the final form, and forwards it to the OPR for approval.

1.8.4. The forms monitor publishes a forms index (to include office forms) at least once a year. Send one copy of the index to HQ AETC/SCMY.

2.1. Material required to administratively control students' progression, evaluate students, instructors, and facilities, record students' accomplishments, summarize scores, etc., meet the criteria of a form. Control these as forms.

2.2.6. All certificates in this command are controlled as numbered forms.

2.2.7. (Added) Items of training literature identified as worksheets, handouts, numbered pages of study guides, workbooks, etc., used for student responses to assignments. Instead, a course number assigned by the originator identifies this material.

2.2.8. (Added) Form memorandums used to disseminate information rather than to collect or record it. Guidelines for preparing form memorandums are in AFMAN 33-326, *Preparing Official Communications*.

2.3.2. Process all waivers through HQ AETC/SCMY.

2.5. Air Force- and MAJCOM-approved forms used for maintaining executive command and control responsibilities, cash and internal control, as well as the sale of merchandise or services of nonappropriated funds instrumentalities (NAFI) are procured with appropriated funds. Local forms related to selling merchandise or services of NAFI are procured with nonappropriated funds. These forms are not designated and numbered, administered as command and local forms, or indexed. They are identified with the symbol (SVS) in place of the form number. The OPR is solely responsible for managing these forms. Forms management personnel may, upon request, assist NAFIs with forms analysis and design support. To obtain this support, NAFIs submit DD Form 67 with the proposed form to the forms management office. Forms monitors send requests to HQ AETC/SCMY for design support. Forms managers forward questionable requests to HQ AETC/SCMY for analysis and determination.

3.6.1. A memorandum signed by an authorized official, an e-mail from the OPR, or an AF Form 673, **Request to Issue Publication** (when used to revise the form's prescribing publication), are other written means for declaring a form obsolete.

3.13. Evaluate only those suggestions for which forms management is functionally responsible and coordinate all proposed responses with the command forms manager.

3.14. Report deficiencies in design and construction of AETC and 19 AF forms by memorandum through functional OPR channels to HQ AETC/SCMY. Submit a copy of the deficient product with the memorandum so the OPR and forms management personnel may review the deficiency.

4.4. HQ AETC/SCMY conducts a forms review on a yearly basis. At base level, the forms manager or forms monitor may authorize review of local forms every 2 years.

4.4.1. (Added) HQ AETC announces new, added, revised, and obsolete forms under the heading "FORMS – What's New," located on the AETC Electronic Publications and Forms Library page at <http://www.aetc.randolph.af.mil/im/>. Revised and obsolete forms are also listed in the AETC Index 9 under SECTION C—OBSOLETE AETC FORMS.

6.3.12. (Added) AETC Form 7, **Review of Proof Copy**.

- 6.3.13. (Added) AETC Form 50, **Appointment Slip.**
- 6.3.14. (Added) AETC Form 109, **Certificate of Recognition.**
- 6.3.15. (Added) AETC Form 163, **Distinguished Visitors Checklist.**
- 6.3.16. (Added) AETC Form 579, **Analysis of Form.**

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