



POLICY NUMBER: 01-005 REVISION: A
POLICY TITLE: Forms Management Policy
DATE: 1 December 2003

1. PURPOSE

The purpose of this procedure is to outline a uniform process for developing, numbering, and displaying the administrative and operational forms required to effectively manage the APICS Phoenix Chapter.

2. PHILOSOPHY

As forms are developed to better manage Chapter business, it is necessary to control the numbering and revision level of those forms to assure that anyone using the form is aware of form availability and revision level.

3. SCOPE

This procedure is applicable to any APICS Phoenix Chapter BOD Member developing a Chapter form and any individual, APICS member or non-member, who must use a Chapter form to receive services, information, reimbursement, and/or conduct any other administrative activity with APICS Phoenix Chapter.

4. POLICY/PROCEDURE

- a. Definitions: None required
- b. Any Chapter BOD member who develops a Chapter form for recurring use will assign a unique number for the form and provide that information to the VP Administration for inclusion in this Policy and the Forms list maintained on the Chapter website.
- c. Form numbers will be formatted as follows: aa## - a, where
aa = functional area; ## = the form number; and a = the form revision
- d. Functional area codes are as follows: AA = Administration and miscellaneous; ED = Education; EX = Executive; FI = Finance; MA = Marketing; ME = Membership; PR = Programs.
- d. The form number will be placed in the footer in the lower left-hand corner of the form.
- e. Forms which support a specific Chapter policy/procedure will be listed by number in the policy/procedure concerned and will NOT be attachments to the policy/procedure. Thus, if a Form is revised, changed, updated, the policy/procedure may no require revision since the form number will not change, only the revision will change.
- f. The VP-Administration will maintain the list of current forms as an attachment to this Policy and provide the list to the Chapter Webmaster for inclusion on the Chapter website.

5. ATTACHMENTS/OTHER CLOSELY RELATED POLICIES/PROCEDURES

a. Attachment(s)

List of current Chapter Forms

b. Closely Related Policies/Procedures/Documents

Chapter Policy 04-010, Chapter Policies & Procedure, current revision

Current Chapter Policy/Procedure Index

6. RESPONSIBLE FOR MAINTENANCE AND COUNSEL CONCERNING THIS POLICY:

- VP-Administration

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Forms Index**

**FORM
NUMBER**

TITLE POLICY

AA - Administration: None

ED - Education

ED01-a	Class Registration Form
ED02-a	Class Roster Form
ED03-a	Course Evaluation Form
ED04-a	Instructor Evaluation Form
ED05-a	In-House Quotation Form
ED06-a	Instructor Kit Inventory Form

EX - Executive: None

FI - Finance

FI01-a	Expense Report Form	04-030
FI02-a	Income Report Form	04-030
FI03-a	Credit Card Income Report Form	04-030

MA - Marketing: None

ME - Membership: None

PR - Programs: None