

<b>Policy Name:</b>	<b>FORMS MANAGEMENT</b>		
<b>Policy #:</b>	AD 9.6	<b>Last Updated:</b>	2022-09-29
<b>Issued By:</b>	SUPPORT SERVICES BUREAU	<b>Approved By:</b>	SURREY POLICE BOARD
		<b>Review Frequency:</b>	AS REQUIRED

**RELATED POLICIES**

AD 9.14 *Records Administration*

**1. PURPOSE**

- 1.1. To standardize the central management of forms requests and development.
- 1.2. To ensure that forms meet current requirements and facilitate operational and administrative needs.

**2. SCOPE**

- 2.1. This policy applies to all Surrey Police Service (SPS) Employees.

**3. POLICY**

- 3.1. This policy ensures consistent standards and processes for the development and distribution of SPS forms.
- 3.2. The development, approval, administration, and dissemination of forms will be coordinated by the Forms Request Triage Committee. This committee reviews and prioritizes forms requests and assigns them to the appropriate group for development and completion.
- 3.3. The Forms Request Triage Committee includes representatives from:
  - i. Information Management Section;

- ii. Communications Section;
- iii. Investigative Services Bureau;
- iv. Community Policing Bureau; and
- v. Support Services Bureau.

3.4. Where possible, forms numbers will be associated to an applicable policy.

3.5. Electronic and online forms will be used whenever practicable.

3.6. The Forms Request Triage Committee maintains the SPS Forms Inventory, a record and index of all forms approved for use that is easily searchable and readily accessible on the SPS InfoNet.

#### **4. PROCEDURE**

##### **Form Request**

4.1. To request a new form, or revise an existing form, an Employee will identify the form, create a rough draft and proposal with substantial rationale for its use.

4.2. The Employee must have the form evaluated by their Supervisor.

##### **Supervisory Review**

4.3. The unit or section Supervisor will evaluate the form request proposal by:

- i. ensuring the form does not contravene legal requirements or SPS policies;
- ii. evaluating the cost of production, report writing time, and use of the form; and
- iii. considering if the new form duplicates other existing forms.

4.4. If the Supervisor approves the form and proposal, the Employee can formally submit their request to the Forms Request Triage Committee via InfoNet.

4.5. If the Supervisor denies approval of the form request, or the form cannot be completed as requested, the Supervisor or the Forms Request Triage Committee will notify the submitting Employee of the reasons.

##### **Creation and Approval**

4.6. The Employee will submit their form request using the online portal on the SPS InfoNet.

4.7. The Employee will provide the following information to the online portal:

- i. form title;
- ii. unit / section owner and bureau information;
- iii. approving Supervisor;
- iv. purpose of the form;
- v. intended audience;

- vi. business urgency;
- vii. requested completion date;
- viii. optional additional information; and,
- ix. attachments (e.g., form draft or business urgency case).

4.8. To create the form the Forms Request Triage Committee will consult with the appropriate units that may take an interest in the form or be required to assist in its creation (e.g., Communications Section, Information Technology, Finance Section, etc.).

4.9. The Forms Request Triage Committee will be responsible for assigning the final development, completion, and distribution of the form.

4.10. The Forms Request Triage Committee will assign a Forms Coordinator to track and index all organizational forms in the SPS Forms Inventory. The SPS Forms Inventory list will capture the following information:

- i. form number;
- ii. form name;
- iii. requesting bureau;
- iv. intended audience;
- v. fields;
- vi. purpose;
- vii. approver;
- viii. completion date;
- ix. form version;
- x. form URL; and,
- xi. form status.

4.11. All forms must contain the following:

- i. SPS service crest;
- ii. designated or unit-specific form number;
- iii. current revision date in the format: YYYY-MM-DD; and
- iv. distribution of form.

4.12. If a form requires mass printing the designated printing service contractor or City of Surrey printing services will be used.

#### **Discontinuation**

4.13. When a form has been approved for discontinuation, the form must be deleted from the Forms Inventory and Employees will be notified.

4.14. Forms that are not approved by the Forms Request Triage Committee must not be used for SPS operational or administrative purposes.

## **APPENDIX A: DEFINITIONS**

“Employee” means a sworn Member or Civilian Employee appointed by the Surrey Police Board.

“InfoNet” means SPS’s internal information sharing network.

“SPS” means Surrey Police Service.

“Supervisor” means a Team Leader, Manager, Sergeant, Staff Sergeant, Inspector, Superintendent, Deputy Chief Constable, Chief Constable, and any other person acting in a Supervisory capacity who is accountable for a particular area or shift on behalf of SPS.

## **APPENDIX B: REFERENCES**

British Columbia Provincial Policing Standards: Addendum 1, *Interim Continuation of Policing Standards Established by the Former British Columbia Police Commission*, s. B3.1.3