



UNITED STATES MARINE CORPS  
 HEADQUARTERS BATTALION  
 MARINE CORPS AIR GROUND COMBAT CENTER  
 BOX 788109  
 TWENTYNINE PALMS CA 92278-8109

BNO 5213.1  
 S-1  
 25 Feb 19

BATTALION ORDER 5213.1

From: Commanding Officer  
 To: Distribution List

Subj: FORMS MANAGEMENT PROGRAM

Ref: (a) SECNAV M-5213.1  
 (b) MARADMIN 646/10  
 (c) SECNAVINST 5210.16  
 (d) SECNAV M-5214.1  
 (e) SECNAV M-5210.2  
 (f) CCO 5213.9D

Encl: Headquarters Battalion Issued Forms

1. Situation. The references establish policy for managing forms, assign responsibility, and provide guidance for implementing a forms management program.

2. Mission. To implement policy and provide guidance for managing forms within Headquarters Battalion (HQBN), Marine Corps Air Ground Combat Center (MCAGCC).

3. Execution

a. Commander's Intent and Concepts of Operations

(1) Commander's Intent. To establish and maintain a local forms management program in accordance with the references. Conduct periodic evaluation of local forms for effectiveness, improvement, elimination of duplication, and or consolidation, as appropriate.

(2) Concept of Operations. The objectives of the forms management program are as follows:

(a) Eliminate unnecessary forms by justifying the need for existing and proposed forms.

(b) Ensure that only approved forms are used.

(c) Increase the command's efficiency by developing forms that are easy to fill in, read, transmit, process, and retrieve.

(d) Prevent and eliminate duplicate forms and consolidate those forms serving like or similar functions.

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(j) Provide assistance on problems concerning existing forms and procedures initiated by activities of this command and those from other sources.

(i) The designated Forms Manager will, coordinate, plan, develop, and supervise the forms management program.

(h) Annually review all forms and prescribing directives to identify whether updates are necessary and notify the RMD Manpower Adjutant of the status.

(g) Coordinate the creation, revision, or cancellation of forms with the appropriate records, Privacy Act, and reports managers to identify all governing issuances and requirements for each form. This includes, but is not limited to, determining the need for and drafting a Privacy Act Statement (PAS), social security number (SSN) justification (if applicable), records disposition schedule, or Report Control Symbol (RCS). The RMD Manpower Adjutant Office is available to provide guidance as necessary.

(f) Each directorate will ensure that forms created for local use are in accordance with the references. Existing forms published by higher headquarters (i.e., DD, NAVMC, SF, DOD forms) must be used if possible. The current forms design tool used by the Department of the Navy is Adobe LiveCycle Designer ES4. Training on the use of the software is available; contact the RMD Manpower Adjutant Office for more information. In most cases, it will be most cost-effective for the FMO to provide assistance with design.

(e) Identify all forms in use and request approval for all unapproved forms. When approved, forms are posted on Naval Forms Online (NFO) at <https://navalforms.documentservices.dia.mil/web/public/home>, which is continuously updated. Unapproved forms are not to be used.

(d) The forms manager or administrator will coordinate with the FMO to review requests, create, revise, or cancel forms. Forms managers will complete the FMO training course available on the My Navy Portal (MNP) [<https://my.navy.mil>] website and provide a copy of the appointment letter and certificate to the MAGTFIC, MCAGCC FMO in the Resource Management Directorate (RMD) Manpower Adjutant Office.

(c) Provide a copy of the appointment letter to the MAGTFIC, MCAGCC FMO.

(b) Designate a forms manager or administrator, in writing, to coordinate with the MAGTFIC, MCAGCC Forms Management Officer (FMO).

(a) Create and maintain a Forms Management Program in accordance with the references and this Order.

(1) S-1

b. Subordinate Element Missions

2. Give additional information if referenced by other blocks (e.g., distribution) and basic information for Block 16 items, including the Standard Subject Identification Code (SSIC) under which the form will be filed when filled and whether it is a Privacy Act system of records, whether personal information is collected from individuals, whether the form is for

questions.

f. Do not restate the questions; make sure that the description in Block 14 indicates that you have considered all these

e. Is the request for information clearly stated?

d. Can the information be obtained from another source?

c. How will the information be used?

b. Is all the information requested necessary?

a. Is the information required under the cognizance of the requesting office?

1. Provide a description of the form to answer the following questions per reference (a) Part II, paragraph 2(a):

(b) Block 14

(a) Complete the following blocks: 1, 2, 5-13 (as needed), 14, and 17. The DD Form 67 can be obtained from the Executive Service Directorate website at [https://www.esd.whs.mil/Directives/forms/dd0001\\_0499/](https://www.esd.whs.mil/Directives/forms/dd0001_0499/).

(1) Guidance for DD Form 67 (Form Processing Action Request)

c. Coordinating Instructions

(o) Reports Manager. In accordance with reference (f), shall control forms that are reporting requirements and will assign the RCS to locally sponsored reports.

(n) Privacy Act Coordinator. The coordinator will ensure compliance with the Privacy Act of 1974 and reference (b). All forms will have the applicable System of Records Notice, PAS, and SSN justification (if applicable). Forms and justifications not in accordance with the SSN reduction program will not be approved. The coordinator will assist sponsors as needed to identify issues and prepare the required documentation.

(m) Ensure all existing and newly created forms are tracked and history maintained.

(l) Conduct an annual review of local forms.

the use of existing or new blank forms.

(k) Review all Combat Center directives and bulletins requiring

b. Directives issued by this Headquarters are published and distributed electronically. Electronic versions of Combat Center directives can be found at <http://www.29palms.marines.mil/Staff/G-1Manpower/Adjutant-Office/Orders/>.

a. Approved local forms issued by this Command are published and available on NFOL. The DD Form 67 Form Processing Action Request is available on the Executive Services Directorate website.

#### 4. Administration and Logistics

(3) Submit a DD Form 67 for forms that require changes, cancellation, or removal from the NFOL website.

(2) Review current forms any time on NFOL. To see a list, use the Forms tab, select Command for the search function, then use the drop downs to select "Marine Corps" and under Activity, select "MCAGCC Twentynine Palms" to see the complete list. To search for a specific form, use the Keyword Search to open a search box and enter either the form designation or title to search. To see cancelled forms, use the above instructions and select the "View cancelled forms" option above the search box. Do not use cancelled forms.

(f) Return the DD Form 67 for Block 18 signature at the end of the approval process. Block 18 must be signed by the AC/S, Deputy AC/S, or Division Director of the Directorate to approve the use of the form. Block 19, leave blank. The FMO will sign Block 20. Digital signatures are preferred for consistent routing and processing.

(e) Submit the DD Form 67 with a draft of the requested form, the SECNAV 5213/1 if applicable, and requiring directive to the FMO. If the directive is lengthy, copies of the first page and pages referring to the still pending signature, the form will not receive final approval until the directive is signed.

(d) The office of primary responsibility (sponsor) will sign Block 17.

(c) Block 16 documents the staffing involved in the form approval process. This should be coordinated with the records, Privacy Act, and reports managers within the sponsoring section before submission to the FMO. The sponsor should consider the use, retention, SSIC, and disposition of the record created by the filled form and include as much information as possible with the request. The FMO will verify all items and provide guidance to the sponsor as needed.

3. Provide an estimated cost of using the form. Block 14 should include an estimate of how many forms will be prepared each year, and the estimated time to fill and process each one. More detailed information can be attached.

input to a database and who maintains the database, whether the form is a reporting requirement, whether information is collected from members of the public, etc.

Distribution: A

S. A. EDWARDS



- b. Signal. This Order is effective the date signed.
- a. Command. This Order is applicable to all Headquarters Battalion personnel unless exempt per the references.

5. Command and Signal

# ENCLOSURE 2

SECTION	FORM #	VERSION	SUBJECT	DATE APPROVED	REVIEW DATE	REVIEW DUE	REVIEW COMPLETE	REC/MNC	PRIVACY ACT OFF SIGNATURE
5-1	5000/1		1 HOBN ROUTE SHEET	2013/07	2013/07	2014/06			
5-1	5000/2		1 HOBN CHECK IN OFFICE/INCO	2013/07	2013/07	2014/06			
5-1	5000/3		1 HOBN CHECK IN MCO AND BELOW	2013/07	2013/07	2014/06			
5-1	5000/4		1 HOBN CHECK IN FAX/FAD	2013/07	2013/07	2014/06			
5-1	5000/5		1 HOBN CHECK IN OFFICE/INCO	2013/07	2013/07	2014/06			
5-1	5000/6		1 HOBN CHECK OUT OFFICE/INCO AND BELOW	2013/07	2013/07	2014/06			
5-1	5000/7		1 HOBN HT/W/	2013/07	2013/07	2014/06			
5-1	5000/8		1 HOBN FAX COVER SHEET	2013/07	2013/07	2014/06			
5-1	5000/9		1 HOBN TAD/TERM WSHIT	2013/07	2013/07	2014/06			
5-1	5000/10		1 HOBN PUBS REQUEST SHEET	2013/07	2013/07	2014/06			
IPAC	5000/11		1 HOBN IPAC PCS DATA SHEET	2013/07	2013/07	2014/06			
IPAC	5000/12		1 HOBN SEPS DATA SHEET	2013/07	2013/07	2014/06			
5-1	5000/13		1 HOBN ATTENDANCE ROSTER	2013/07	2013/07	2014/06			
5-1	5000/14		1 HOBN PFT/CTT TALLY SHEET	2013/07	2013/07	2014/06			
5-1	5000/15		1 HOBN POMMA WORKSHEET	2013/07	2013/07	2014/06			
5-1	5000/16		1 HOBN COMMAND SCREENING CHECKLIST	2013/07	2013/07	2014/06			
IPAC	5000/17		1 HOBN IPAC PCA DATA SHEET	2013/07	2013/07	2014/06			
CANCELLED									

HOBN ISSUED FORMS