



TOWN OF DEWEY-HUMBOLDT ADMINISTRATIVE REGULATION

AR № 12-01

**Subject: *Counter Form Policy and
Modification Procedures***

Effective Date: October 1, 2012

1. **SCOPE.** This policy applies to all Town staff.
2. **PURPOSE.** To promote excellent customer service by simplifying and streamlining the counter forms; to provide guidelines for internal organization of counter forms.
 - 2.1. The guidelines are established to avoid confusion and embarrassment caused by the “messy form situation”. All employees are to protect and care for the forms and help the Town Clerk’s Office with its responsibilities and actions reference to the form organization. Inability and or unwillingness to conform to this policy could result in disciplinary action.
3. **COUNTER FORM POLICY.** The Town Clerk’s Office is the ultimate custodian of the forms. The office is responsible for the forms organization and modification. The Town Clerk’s Office needs cooperation from all employees.
 - 3.1. **MASTER BINDER** – All current forms are in a master binder which is in the possession of the front desk personnel who is under the Town Clerk’s supervision.
 - 3.2. **TOWN INTRANET SHARED DRIVE (S DRIVE)** – All current forms are saved in the “S Drive – FORMS1” as “word” and “.pdf” files. This is the original source for all forms. Employees can print off or email the .pdf forms at their discretion. NO PHYSICAL CHANGES CAN BE MADE TO THE FORMS IN THIS FOLDER without prior authorization. Modifications shall follow the procedures in Section 3.6 of this article.
 - 3.3. **LOBBY COPIES** – The Front Desk personnel or other employee(s) in the Town Clerk’s office are responsible for arranging the lobby copies based on frequency of use.
 - 3.4. **FILE DRAWER COPIES** – A set of copies of all forms are placed in the file cabinet next to the Town Manager’s Office. The copies correspond with the forms in the MASTER BINDER. The Front Desk personnel or other assigned employee(s) in the Town Clerk’s office are the custodian of the forms. The Clerk’s Office can establish procedures for checking out forms; all employees must respect the procedure and other requests made by the Clerk’s Office reference to the forms.
 - 3.5. **TOWN WEBSITE COPIES** – A set of copies of frequently used forms may be posted on the Town’s website. The Town Clerk’s Office is in charge of the posting and updating. Other employees can request updates or changes to the posted forms. Under the Town Manager’s direction, the Town Clerk determines the necessity of the request(s).
 - 3.6. **MODIFICATION PROCEDURE** – The counter forms are created to implement the Town Code. From time to time, it will be necessary to modify, delete or add to the existing forms. No employee other than the Town Clerk and/or his/her designee shall physically modify the forms referred to in 3.1 – 3.5 of this article. Modification is to be handled as such:
 - a. Each responsible department or the Town Clerks’ office can initiate the modification request by making a written request to the Town Manager outlining the modifications.
 - b. The Town Manager will approve or comment on the request.
 - c. If the changes are approved, the Town Clerk’s Office is in charge of the modification. All Departments are to comply with the Town Clerk’s Office’s modification procedures. The Town

Clerk may delegate this responsibility to pertinent department with instructions. A sample modification checklist by the Town Clerk's Office is:

- Replace or delete old version and make a PDF copy.
- Print Master Copy and replace in Binder
- Print and replace copies in Lobby and File Cabinet.
- Upload PDF file on website – remove old versions.

TOWN MANAGER APPROVAL	Initial: <u>ME</u>
Notes: _____	