



# United States Department of the Interior

OFFICE OF THE SECRETARY

Washington, D.C. 20240

JAN 25 2012

Memorandum

To: Assistant Directors for Information Resources

From: Bernard J. Mazer  
Chief Information Officer

Subject: Enterprise Forms System (EFS)

This memorandum is an update to the June 15, 2011, memorandum announcing the Enterprise Forms Business Process Management Program, which has been renamed the Enterprise Forms System (EFS). The Department of the Interior (Department) has taken another step forward in its efforts to support the Information Technology Transformation (ITT) and Secretarial Order 3309 by awarding a cloud-based EFS solution. The EFS will leverage modern technology to provide an automated solution for all internal and external Bureau and Office forms<sup>1</sup>, and improve support to its customers through dramatic cost-reductions in personnel, time, and process delivery. The EFS will be managed by the Departmental Forms Manager within the Office of the Chief Information Officer (OCIO).

The EFS is a secure solution that provides electronic workflow using standard web-based screens and email integration. The workflow uses prompts that enable the user to complete and submit forms directly to the required entities, increasing the efficiency and timeliness of the forms business process.

Other key EFS features:

- Ensures processes for records, privacy, information collection clearance, and Controlled Unclassified Information (CUI) compliance
- Reduces paper output in support of greening initiatives
- Provides a secure central repository for forms in-process
- Supports digital and electronic signatures
- Provides seamless integration with pre-defined portable media (e.g., BlackBerry, iPad)
- Provides automated submission notifications and escalation alerts
- Supports a searchable index
- Provides an audit trail
- Collects Key Performance Indicator (KPI) metrics to assist in document management

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<sup>1</sup> A "form" is defined as any arrangement of data fields designed to systematically and repetitively collect, store, extract, and/or transmit the prescribed data, regardless of medium.

All current Bureau and Office forms will be scheduled and migrated to EFS. Each Bureau and Office will be required to utilize the EFS forms development process to prioritize the migration of all forms into the new EFS. Bureaus and Offices shall coordinate this migration with their respective Bureau and Office forms managers (see attached list of forms managers). As forms are implemented in the EFS, they will be considered the official forms, and other form versions will no longer be accepted.

**In support of this initiative, effective immediately, the Department is issuing a moratorium on the issuance of new Bureau and Office forms, and forms systems.** Bureaus and Offices may not publish any forms that have not been approved and implemented within the EFS. Bureaus/Offices may submit requests with business justifications to the OCIO for exceptions to the moratorium, or for extensions of the scheduled migration. Examples of extenuating circumstances may be interim solutions for necessary new forms, or permanent exemptions for a given form, e.g., due to the complexity of the form or changes to current contracts that would be cost-prohibitive. All requests will be reviewed to assess any impact on the Departmental information technology architecture, strategic direction of the OCIO's eRecords and Departmental Records programs.

If you have any questions regarding the EFS initiative, please contact John Montel at (202) 208-3939, [John\\_Montel@ios.doi.gov](mailto:John_Montel@ios.doi.gov).

Attachment

cc: Bureau and Office Directors  
Bureau and Office Forms Managers  
Bureau and Office Records Officers  
Bureau and Office Privacy Act Officers  
Bureau and Office Information Collection Clearance Officers

Attachment – DOI Forms Program Contacts

Contacts	Roles
John Montel eRecords Service Manager (202) 208-3939 John_Montel@ios.doi.gov	Responsible for the EFS Program. Primary point of contact for all technical and operational solution issues.
Edwin McCeney Departmental Records Officer (202) 208-3321 Edwin_McCeney@ios.doi.gov	Responsible for managing the Department's Records Management Program which includes records schedule policies. Primary contact for Bureau Records Officers.
Vany Kaiser Departmental Section 508 Coordinator (202) 208-3387 Vany_Kaiser@ios.doi.gov	Provides program support for the Departmental Records Officer and overall EFS platform services.
Teri Barnett Departmental Privacy Act Specialist (202) 208-1943 Teri_Barnett@ios.doi.gov	Primary contact for Department privacy-related issues and Bureau Privacy Officers.
VACANT Departmental Forms Manager	Responsible for managing the Departmental Forms Program. Primary contact for Bureau Forms Managers.
Kashieka Minor PMB Correspondence (202) 208-3697 Kashieka_Minor@ios.doi.gov	Forms Manager for PMB
Karen Wrenn Electronic Forms Manager (303) 236-0233 kwrenn@blm.gov	Forms Manager for BLM
Mary Dixon NBC Program Manager (303) 969-5153 Mary_T_Dixon@nbc.gov	Forms Manager for NBC
Terry Bellehu Management & Program Analyst (703) 787-1535 Terry.Bellehu@bsee.gov	Forms Manager for BSEE & BOEM
Brenda Taylor Chief, Capital Planning & Info. Policy (703) 787-1122 Brenda.Taylor@ bsee.gov	Forms Program Manager for BSEE & BOEM
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Contacts	Roles
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