



Forms Submission Process

Internal and External Protocol Manual

Process Requirements

1. Ticket Submission Requirements

- All form build requests must be submitted through the official ticketing system. Requests submitted via alternative channels (e.g., email, Slack, or verbal communication) will not be acknowledged or processed.
- Once a ticket has been closed, any additional form requests for the same customer must be submitted as a new ticket, not by reopening the original one.

2. Service Level Agreement (SLA)

- The standard turnaround time for form completion is a minimum of **10 business days** from the date of ticket submission. This timeline applies consistently to all customers.
- Requests involving multiple forms or complex requirements may require additional time. Any extended timelines will be communicated through the ticketing system after the initial assessment.

3. Attachments and Documentation Standards

- **Required Attachments:** All relevant templates or forms must be attached directly to the ticket. Providing links to shared drives or folders is not acceptable and will result in the ticket being returned for clarification.
- **Clear Specifications:** Each attachment must be clearly labeled and include detailed instructions for its intended use and any required customizations. The attachments will only be accepted in written format, not in video format, for initial development, changes, and corrections.
- **Single Source of Truth:** All supporting documentation must be contained within the ticket. The Forms Team will not retrieve documents from external folders, repositories, or shared drives.

4. Quality Assurance Protocol

- **First Review - IS Lead:** IS Leads are responsible for conducting the initial QA review before forms are shared with the customer. All feedback and corrections must be documented within the ticket or a linked child ticket.
- **Second Review - Customer Validation:** Following IS Lead approval, forms are provided to the customer for review and final validation.
- **Correction Management:** All corrections must be submitted through the ticketing system with clear, detailed instructions. Corrections submitted through informal channels (Slack, email, etc.) will not be processed.

5. Communication Standards

- **Primary Communication Channel:** All communication regarding form projects must take place within the ticketing system to ensure accurate documentation and tracking.
- **Status Updates:** Requests for status updates should be submitted through the ticket. The Forms Team will provide updates according to SLA milestones.
- **Escalation Protocol:** Concerns related to delivery timelines or project challenges should be escalated through management channels via the ticket system. Escalations through Slack, email, or direct messages will not be considered valid.
- **Professional Boundaries:** The Forms Team will not respond to requests or communications submitted outside of business hours, on weekends, or through informal channels.

Important: All communications and documentation must be managed exclusively through the official ticketing system to maintain process integrity and traceability.

Process Workflow

1

Request Initiation

Customer submits a complete ticket with required attachments and specifications.

2

Ticket Validation

Forms Team reviews the ticket for completeness within one business day. Incomplete tickets are returned with guidance for resubmission.

3

Project Assignment

Valid tickets are assigned to team members based on workload and expertise. Expected completion dates are communicated through the ticket.

4

Development Phase

Forms are built according to submitted specifications. Any clarification needs are addressed through the ticket.

5

Internal QA Review

IS Lead reviews the forms and documents required corrections in the ticket.

6

Correction Implementation

The Forms Team applies all corrections and updates the ticket status.

7

Customer Review

Forms are submitted to the customer for validation, with feedback provided through the ticket.

8

Final Delivery

Upon customer approval, forms are delivered using the method outlined in the original ticket, and the ticket is closed with confirmation of delivery.