Pennsylvania Search and Rescue Council SAR Forms Packet

Introduction, Principles and Major Changes

Version 2.0, draft version 0.7 August 2004

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A Personal Introduction

--Keith Conover, M.D., FACEP

Back in 1992, I put together a draft set of forms for the Pennsylvania Search and Rescue Council. I based this on the ideas that:

- (1) the standard ICS forms are designed for wildland fire suppression and don't work well for SAR,
- (2) for most SAR operations, many ICS forms and much of the information on the ICS forms is superfluous and (at least) mildly confusing, and
- (3) a good set of SAR forms can help guide a search into working well -- whereas forms that lead one astray (like into wanting to assign an air-tanker supervisor for a lost person search) can hamper a search.

It was just a draft for discussion, so there were even different, contradictory ways to do things on the various forms. Nonetheless, PSARC took this draft package and voted it in as the official set of state SAR forms, leaving me feeling guilty ever since. This present project is an atonement process – helping PSARC finish what was semi-unwittingly started seven years ago. Now, as it should be, this is a process involving many different people from PSARC and other teams, and suggestions from around the globe. My personal thanks to all who suggested improvements over the previous years, and to the group within PSARC who worked to provide this second version of the forms packet. Once this new packet is reviewed, revised and approved, I will finally feel that my penance is done.

Original Design Principles

Before you get to the nitty-gritty details of the forms packet, here are the design principles from the original proposal:

- The form set should run a moderately large lost person search, large enough to need several separate Branches. (If Divisions are needed, each Division uses the standard forms and an ICS Division Assignment List (ICS 204) can be used.)
- As much as possible, the forms should look the same. Information that goes on many different forms (e.g., date, incident name) should have blanks in the same standard place on each form.
- We should print the forms in typefaces that are easy to read and reproduce well on low-resolution laser printers and photocopiers. We should put most of the text in an easy-to-read serif font. (Serif fonts are, to Americans, most readable.) I've chosen Bookman. We should use a single other contrasting font for larger titles (I've chosen Avant Garde as it shows well in white on black on laser printers). [We have since rethought this and have a better idea. For short chunks of text, we now think sans-serif fonts are just fine. And we've found a typeface that looks more professional, is easy to read, and is compact; Garrison sans is our choice, and this is what it looks like in **bold** and in *italic* and in *bold italic*.]

New Design Principles

Below is our set of new principles. This is a *very* detailed set of principles. But as the original PSARC SAR Forms have been used as a model by others, we decided to include in this packet *all* the design principles and the reasoning behind them. First off, this will make it clear why we made the decisions we did, and those who disagree with one or more of these decisions will at least be able to see that we considered the alternatives and why we made the choices we did. And more importantly, these design principles may be

of use to those who like either the content or the "look and feel" of the forms, and wants to make a somewhat similar set for other uses. Please forward any comments or suggestion to the PSARC Forms Committee, c/o Dr. Conover at the address or email at the top of the page.

General Principles

- *Design Software*: originally the forms were designed, and the PDF files made, from a design package called MicroGrafx Designer. While state-of-the-art at the time the packet was first created, this company and its products have fallen by the wayside. Adobe Illustrator has become the dominant software for this type of project, so the new forms were ported to the Adobe Illustrator format. When using Illustrator, a 72-point (1") grid with 16 subdivisions per grid (works out to 4.5 points or 1/16" for each small box) is used as a grid for guiding design, and the "View | Overprint Preview" is used to make this grid visible under the form. The rulers are adjusted so that the page aligns with the grid.
- General Look and Feel: It was suggested that we make our forms look like the ICS forms. For instance, the Bay Area Search and Rescue Council (California) forms packet looks very similar to the ICS forms. But their problem with rejection of forms that "don't look like ICS" doesn't seem to be as much of a problem here. Our feeling was that "make the forms look really nice and people are more likely to fill them in and use them."
- *Name:* The forms will be named "Incident" rather than "Mission" as they can be used for operations other than SAR missions, e.g., rescue/medical standby for outdoor operations.
- Size: All forms on letter-sized paper to easy copying (unlikely to have legal-sized paper at Base).
- Same information in same place on different forms. (PSARC and DCNR logos, mission name and number, date, page number, etc.) Portrait and landscape mode forms will need to be somewhat different, but all portrait-mode forms should have a similar layout for these items, and all landscape-mode forms should have a similar layout. If a part of the header or footer doesn't apply to a particular form, it will be greyed out (text in 62.5% grey, and boxes with 12.5% grey interior and 62.5% grey box lines).
- *Orientation:* All sign-in and similar forms will be landscape orientation, and all other forms in portrait orientation.

• Margins:

- Half-inch margins on all forms, to avoid computer-printer and photocopy problems.
- We thought about wider "gutter" margin on the left for three-hole punching and binding. But we decided that binding/3-hole punching will always be done after the fact. And, so, if we make sure that the left-most portion of all forms has header and other non-essential information, then we can avoid having gutter margins. There was some suggestion that we avoid these rotated-text headings, as it's very hard to make these in Microsoft Word, which can be used to make electronic forms that can be filled in using a laptop computer. (We already plan to distribute the forms in Adobe Acrobat form so they may easily be reprinted as needed). However, at this point, we have decided that the benefit of these headings in the paper version outweighs the difficulty of creating MS Word versions of the forms. We have investigated the use of Adobe Acrobat versions of the forms, and indeed Acrobat provides the functionality we need without having to use Microsoft Word.
- We discussed the idea of having black index "tabs" extending all the way to the edge of the paper, so that thumbing through the packet one can easily get to the right form, tell if any form is out of place, and be sure that the packet is complete. This idea is extremely attractive, yet the problem is that most computer printers can't print to the edge of the page (can't do a "full-page bleed"). However, we decided that including the tabs on the forms would be a good idea; if printed on a standard printer, the tabs wouldn't be there, but if we are able to have large numbers of the forms packet professionally printed, the tabs would be there. The tabs will be on the right margin of the first page of each form.
- Reverse Side: Orientation on reverse side of forms:
 - We discussed whether to have the back side of multi-page forms right-side-up or upside-down. Our consensus was to have the back sides of forms upside-down as almost always they are used on clipboards rather than in a notebook. True, you can't write on the form upside down while it's on a clipboard, but you can flip it up and at least *read* the information. However, people seem to want to keep the back rightside up when they print off the forms, so we gave in and gave up on having the backside of the forms upside down.
- Joint Forms:

- Having this as a joint DCNR/PSARC Forms Packet saves taxpayer dollars, and promotes interagency cooperation.
- We will add official DCNR logo to the forms along with the PSARC logo.
- The Forms Committee unanimously approved this in 1998.

Generic Design Details

- Width and Type of Dividing Lines Between Sections: Width and type of lines should be consistently used to delineate major section grouping, minor section grouping, and subsection grouping. Our standard will be:
 - Major Section Grouping:
 - Sections set off by thick (2 point) black lines
 - Titles in 90° rotated text along left margin, white text with black line around the outside on dark (50%) grey background, in

15-point Garrison ExtraBold

- Minor Section Grouping (used only when needed):
 Titles in black text on 12.5% grey background.

 Sections set off by thin (0.75 point) black lines
- Subsection Grouping: fine hairlines
- Less-important Text: text tags for less-important/administrative blocks are in italic we were tempted to make the write-in boxes for such information slightly tinted, too, so that when one's filling out the forms under time pressure during a mission, one can look at a form and see that all the white boxes are filled in, and you can ignore the tinted stuff until there is time to deal with it. However, we decided to reserve boxes with tinting inside them for those that simply don't need to be filled out at all (see below).
- *Index numbers* for all entry fields, looking forward to when we can have a complete set of electronic forms. Index numbering should extend across the entire form, including all pages (unlike the current Virginia Task Assignment Form that restarts numbering again on the Debriefing Form on the back). Index numbers will be in 6-point Garrison Sans.
- Single Electronic File: When distributed electronically, all forms are available in a single file; for now at least, it will be an Adobe Acrobat .PDF format. This will have the advantage that it's impossible to "lose" one of the forms, and one can tell that one has a complete set of up-to-date forms. One question was whether this entire text file needed to be included with the electronic forms packet—the answer is yes, since the forms will be continuously critiqued and updated, and an understanding of the previous reasoning for things is important (and may prevent getting the same suggestions over and over and over and over).
- *Multipart Forms:* There was a suggestion that different forms may be photocopied onto different color paper; this is widely used in many areas. For instance, green for Ops, blue for Plans, yellow for Logistics, pink for something else, and white (personnel). However, some copiers don't copy colored paper well (they copy as gray), so all our "original" forms packets will be distributed on white paper, except for the TAF that we will try to get some state agency to print for us on multicolor multipart forms like the Virginia SAR Council forms printed by the Virginia Department of Emergency Services.
- *Attachments:* Forms should indicate usual or expected attachments with checkboxes to indicate that the item has been attached (maps, state road maps, aeronautical charts, etc.)
- *Pages:* One of the things that Keith experimented with on the 1992 forms set was with the question of "pages." Some forms were one-sided, some are two-sided, and some are multiple pages (e.g., Missing Person Questionnaire). Sometimes, one needs to use multiple copies of a form for a particular operational period, so there needs to be a way of indicating an individual form's place in the sequence for that operational period. Given this, does "Page 1 of 2" mean that this is a two-page form, or that it's the first of two copies of this form for the operational period? In order to address this, we decided that all forms, except TAF, Mission Report and Missing Subject Questionnaire, will be single page; this means that the Resources form will have to be split in two. This should help eliminate this confusion.
- Fill-In Boxes:
 - All places into which one may write will be clean, blank boxes.
 - They will be clearly different from the text "tags" explaining what's supposed to go into each box, and from any other text.
 - (See below for details.)

Common Form Elements (Same for All Forms)

- Text
 - We agreed to make all text reversed (white bordered with black on grey) or tinted (black on a 12.5% grey background). One exception is the Searcher Information Sheet, which is a "read-only" form, and for legibility in poor light in the field, the text will all be black on white. For readability, the text will be increased from 10.5-point to 13-point Garrison Sans.
 - Exception: the upper left-hand box with the PSARC and DCNR logos and title will be white to make it stand out--it is easy to tell that this is *not* an area into which one's supposed to write.
 - Most text on a form will be in 10.5 point Garrison Sans (AKA Hammersmith, AKA Gill Sans), except as described below. It will usually be on 11-point or 9-point leading.

Header:

- *Top Left of Form:* nontinted title box with:
 - Top Left of Box: Small (.72" diameter) PSARC Logo
 - Top Center of Box: Title of form, centered, in

22-point bolded Garrison Sans

with 18-point spacing (can have subsidiary or alternate title/explanation in smaller print under main title, also centered) in [14-point Garrison Sans, not bolded]

- Top Right of Box: Small (.9" wide) DCNR logo
- *Bottom Left of Box*: gives name of which ICS position completes the form, e.g., "by IC" or "by Plans" or "by Plans/Restat" in 14-point **Garrison Sans**
- Bottom Right of Box: "_th of set of 6 once-per-incident forms" or "_th of set of 10 daily forms" -- each once-per-incident form name starts with "Incident" and each daily form name starts with "Daily"
- *Top Right of Form:* (this will be the same for all forms; fields that are irrelevant for a particular form will be greyed out as described above):
 - Mission Name
 - Mission Number(s) (AFRCC/PEMA/DCNR/others) (italics for low priority)
 - Date
 - Operational Period
 - "Other" Box (empty) can be used for Division Etc. (italics for low priority)

• Footer:

• *Version Number* of each Form X.Y (e.g., 2.0, 2.1) where X is a major version (e.g., revision of the entire forms packet), and Y is a minor revision (e.g., making a small but significant revision of one of the forms). The forms packet, including *all* forms, will be renumbered whenever a new edition (version) of the entire forms packet is produced.

The advantages of renumbering forms individually are primarily to save paper – the disadvantage is confusion about which is a current version of the form. Though we like to save trees, avoiding confusion in SAR saves lives and takes precedence.

In 10.5-point bolded Garrison Sans.

• For daily forms that may extend over multiple sheets: "Sheet of for this day".

In 10.5-point bolded Garrison Sans.

• Copyright notice: "Copyright © 2004 by Pennsylvania Search and Rescue Council. All rights reserved. Local/State/Federal Government, SAR Council member and other volunteer SAR team use and limited reproduction by permission if non-profit, with attribution and without alteration." In 9.5 point Garrison Cond. Sans on 8-point leading.

• Fill-In Boxes

• 3/16" line spacing seems to be better than the original forms packet's 1/4", as 1/4" is high enough for all to write in, and allows more text to be entered on the forms.*

• Places that one can fill in will generally be both boxed and surrounded with a rim of tint. The fill-in boxes will have a rim of 1/16" of tinted area between them, and between them, and

^{*} Addendum: using the new Adobe Illustrator we can now use a grid that works in fractional inches and points, and will get away from decimal inches (which make calculations and adjustments difficult); thus, changing line spacing from 0.2" to 3/16 inch (13.5 points).

- between their edges and the edges of the surrounding box. Boxes will be 3/16" high, and boxes that require multiple lines will be in multiples of 3/16" high, with dotted lines at 3/16" intervals.
- Large fill-in areas, however, do not need a tinted rim; however, there may be some tinted background at the top, not separated from the main fill-in with a box, with prompting text or a minor heading.
 - John Carnes of Bay Area Search and Rescue Council (CA) has a different approach: he avoids reverse color and tinted areas as he finds that on their cranky old copier, such don't copy well and tend to use up toner. Our feeling is to make the forms better and get extra toner if needed we think the improvement in SAR operational efficiency is worth the extra toner. We also wondered how the tint would copy we copied our draft formats over and over, and they seem to look pretty good, even when a copy of a copy of a copy of a copy.
- Fill-in boxes for single items have descriptive text to the left, with a colon to provide more indication of the need for the fill-in. The text is right-justified; it is 10.5-point Garrison Sans, vertically centered to the box. Where two lines of text must go with a single-line fill-in box, it is 10.5-point Garrison Sans with 9-point leading, vertically centered around the center line of the box. This will allow the text to fit neatly into the vertical area needed by the box, which is 3/16" plus two 1/16" tinted margins for a total of 5/16". If desired, a subsidiary explanation may appear under the main text in 9-point Garrison Condensed Sans.
- Fill-in boxes requiring two or more lines are needed for the fill-in, the box height will be in multiples of 0.2" (changed to 3.16"), and there will be dotted hairlines (changed to 1-point 50% gray) across it at 0.2" (changed to 3/16") vertical intervals. The text to the left of the box, if multiple-line, is 10.5-point Garrison Sans with 11-point leading (14.2-point leading changed to 3/16" if it is needed to have the text line up with the dotted lines in the box, as on the Missing Person Questionnaire).
- Large-item fill-ins can come in two flavors:
 - A large-item fill-in that has only a major-section indication (e.g., Mission Report area for Participating Organizations), which will have none of the 12% tinting around it, and
 - A large-item fill in that needs a brief explanation (e.g., the "Remarks" section of the "Locating and Medical Data" section of the draft Mission Report) or a couple of checkboxes or short fill-ins attached; these will be at the top, and in 12% tint, but there will be no black line separating the 12% tinted area from the main part of the large-item fill-in.
- *Checkboxes* are 1/8"=9 points, vertically spaced, where appropriate, at 5/32" spacing, or 1/32" between them, and have text to the right of them, left-justified; text and surrounding of the box should have 12.5% tinting as above. Text is 10.5-point Garrison Sans, in individual lines manually spaced to match the checkboxes, which works out to be 11.25 points.
- *Box Surrounds:* we learn from the published work of Edward R. Tufte that white boxes on forms work better if surrounded by a bit of darker grey. We tried 100% black hairlines, but on some printers and with some commercial printing, they didn't work at all—invisible. So we changed to 0.75-point 25% gray lines around the checkboxes and fill-in boxes. Those fillin boxes that are of critical importance, though, are highlighted by a 1-point 100% black line.
- **Dotted Lines:** Though the black dotted lines looked pretty nice on the bubblejet we used at the meeting, they don't look as nice when printed on a Laserjet. Therefore we changed all dotted lines to 50% grey, 1 point high, which seemed to print appropriately on a variety of printers. It's a little ugly on an inkjet (looks slightly wavy) but seemed to print well on laser printers and more of the forms will be printed on laser printers, or photocopied from laser printer output, than from inkjet printers. However, later we found that in Adobe Illustrator a **25% gray 0.75 point line** looks better.

Index of Forms

- Incident Forms
 - Incident Lost Person Questionnaire (ics-i-1)
 - Incident Objectives (ics-i-2)
 - Incident Medical and Evacuation Plan (ics-i-3)
 - Incident Communications Plan (ics-i-4)
 - Incident Searcher Information Sheet (ics-i-5)
 - Incident After-Action Report (ics-i-6)
- Daily Forms
 - Daily Log (ics-d-1)

- Daily Table of Organization (ics-d-2)
- Daily Personnel Register (ics-d-3)
- Daily Vehicle Register (ics-d-4)
- Daily Task Log (ics-d-5)
- Daily Clue Log (ics-d-6)
- Daily Communications Log (ics-d-7)
- Daily SAR Resources Worksheet (ics-d-8)
- Daily Equipment Log (ics-d-9)
- Per-Task Forms
 - Task Assignment Form (ics-taf)

Suggestions for Specific Forms:

- Incident Lost Person Questionnaire:
 - Reorganize to make better use of space
 - Have information on dementia ("Alzheimer's"), behavior when previously lost and where found, prominently near the front
 - Add something similar to the Massachusetts form, with track information
 - Have a summary of critical information at the front or the back similar to the Virginia form.
- Incident Objectives:
- Incident Medical and Evacuation Plan:
 - Update to include location of nearest Level I Trauma Center for major trauma, and for facilities with core bypass capabilities for severe hypothermia rewarming. These are the two main reasons the Incident Staff might want to send to somewhere other than the nearest hospital ED.
 - Update to include basic commo information for local public safety vehicles and bases, hospitals via radio, and helicopters (note to extract this information from the Incident Commo Plan).
 - Change "Base Camp" to "Base"
 - Have only one "Base" section, not two.
 - Have instruction to create Evacuation TAF with at least Team Letter and Equipment and (may note in Personnel section to strip Incident Staff to make up Evacuation team if needed) attach to plan, and.
 - Add Veterinary Hospitals, checkbox for "can handle horses."
 - Add checkbox under "Medical" for "Wilderness Medical Resources Available?"
 - Add checkbox under "Hospitals" for "Medical Command Available?" and another for "Wilderness Medical Command Available?"

• Incident Communications Plan

• Update to include complete commo information for local public safety vehicles and bases, hospitals via radio, and helicopters (also note to also extract and put this information on the Incident Medical and Evacuation Plan).

• Incident After Action Report

- Will rename to Incident Summary.
- May want to add checkboxes for other types of missions:
 - disaster response
 - special events/support activities
- One comment was to not have an After Action report, just to use the NASAR one however, there are enough important other things that various people and agencies want that we decided that we need our own state form.
- Suggested that we add section that can record boat and dive hours (accepted)
- Suggested that we add section on number of radios and hours of radio time (rejected)
- Suggested that we add section on "operational problems and lessons learned." May be a problem putting this on the major legal summary of the incident will keep this off the form, and keep such comments in the "Lessons Learned" section of the PSARC meeting minutes instead.
- DCNR to be able to use this needs to have:
 - distance from LKP to found (uphill, downhill, etc. nice but not required have comments field).
 - County location.

- "Did you "save" subject from life-threatening conditions?" was discussed but finally decided against this
- Found by (need resource type, too)
- How long was victim mobile?
- Subject Name/Sex
- (Manhours of DCNR Park/Forest personnel can be gotten off the signin and don't have to appear on the Mission Report.)
- Responsible Agency.
- Category of subject (hiker, hunter, child, etc.) have few examples and fillin.
- Required Items, organized by Section (note that there are many possible additions; we attempted to include only those that are likely to be needed in such a summary report; remember, detailed information can be gotten from the entire set of mission paperwork if needed).
 - Mission Type and Extent
 - Type of Operation (checkboxes/other box)
 - Start and Stop date and time, Suspend vs. Close
 - (Decided to take off Base Location; if different bases for different Divisions or Groups, can go in the "other" box in the right-hand header.)
 - County(s) (instead of Base Location)
 - Public land involved? (checkbox)
 - Locating and Subject Data
 - Number involved/alive/dead/still missing
 - Name(s)/Age(s)/Sex(s)
 - Category of subject (hiker, hunter, child, etc.) have few examples and fillin.
- Find Data:
 - Date/Time
 - Type of Resource (e.g., Hasty, Grid, Dog)
 - Name/Organization
 - Lat/Long Coordinates of Find
 - Distance from LKP to Find
 - How long was victim mobile?
 - Medical Remarks (include specific injury or illness and severity, name of medical facility accepting any subjects).
- Participating Organizations
 - Responsible Agency/Agencies: name, title, contact telephone numbers
- Personnel and Equipment
- Operational Summary
- Prepared By: (name, title, date) (decided to take off the "approved by IC" as this is unlikely to be needed very often).
- "Please Send a Copy of This Form To:" with PSARC address

• Unit and Command Logs:

- make one page
- have a single log form for both
- Change "Daily Unit Log" to "Daily Event and Action Log (for Units or Incident Staff Officers)" (suggestions based on military staff officer logs) and add:
 - Item #,
 - Time (asked/action) and
 - Action Taken
- Daily Table of Organization:
 - Under Operations, remove the first "Branch" and make it "Evacuation/Medical Team"
- Daily Personnel Register:
 - After discussion, we decided there was no reason to have separate "Volunteer" and "SAR Unit/Government" personnel registers. If agencies want to know who was from which agency, they can get it off the register forms after the operation.
 - Will add vertical tags and checkboxes for:
 - IS
 - FTL
 - FTM

- EMT-Basic
- WEMT-Basic
- EMT-P
- WEMT-P
- Dog Handler
- Rope Rescue/MRA cert.
- Change "Estimated Departure" to "Available Until"
- Daily Vehicle Register:
- Daily Task Log:
 - Since the TAF file is the major source of information, there isn't really much need for detailed information on the Task Log.
 - On the other hand, the Task Log on the TAF file serves as an index and summary, which is useful for both strategic and tactical planning, so some summary information there will save lots of pawing through the TAFs.
- Daily Clue Log:
 - checkboxes at top for "all clues" or "field clues" "walk-in clues" "telephone clues" so that for big searches, staff can run three separate clue logs, one by the radios, one by the phones, and one for the investigators.
- Daily Communications Log:
- Daily SAR Resources Worksheet:
 - As noted above, will break into two forms.
- Task Assignment Form:
 - base on Virginia Search and Rescue Council TAF but improve as below.
 - Briefing checklist: to be done/done
 - Fix *debriefing* on back:
 - Wind speed/variability together;
 - Block 13: Yes/No blocks (this way a block must be checked for each item, allowing a sense of completion when a box is checked for each item);
 - Combine 14-15; "Task completed as assigned" checkbox at top; also combine 16-18.
 - 17: delete "F-U log" as no such log exists;
 - 19: (trail/off trail) (decided at the 5/99 meeting this wasn't needed).
 - Bob Koester's suggestions:
 - "On the debriefing side (back) a lot of people don't realize (or didn't at first) the wx [weather]is only for air-scent dogs. That information can then be matched up with the fuzzy chart Hatch Graham drew up to give realtive PODs."
 - "Under item 13. the line (if no explain in block 15 or 17) was chopped and dropped by accident."
 - "Hazards terrain noted should have perhaps more space."
 - "The order of Responsive, unresponsive, clues, should be changed. Unresponsive should be the first or last. Perhaps a box around unresponsive POD Summary (debriefer) would avoid the often asked question of which POD do we use for PODcum." (try de-emphasizing responsive and clues with italics)
 - "Margin of error (which as proved really interesting when reviewing large numbers of TAF) might be reworded. A lot of people don't understand the concept. With training everyone in Virginia now has no problem. But it might be changed to Max/Min P." (Originally, Liked Margin of Error better; will de-emphasize with italics, but later decided just to offer a range of POD on the form and to combine unresponsive/clues, as most of us think they're really about the same. Emphasized the POD-unresponsive/clues with a one-point line around it as this is what POD calculations should be based on.)
 - Along the side: "Original for TAF file, Duplicate for FTL."
- Add: Daily Equipment Log
 - Add this as a form.
- Add: Searcher Information Sheet:
 - Add one to the packet.
 - Handout with information on safety, search tactics, and search operations.
 - Nothing to be filled in on this form.

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