Republic of the Philippines
Department of Education
REGION III
BATAAN HIGH SCHOOL FOR THE ARTS

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SCHOOL MEMORANDUM No. 198, s. 2026

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SCHOOL-WIDE ROLL-OUT OF THE DOCUMENT TRACKING AND ROUTING SYSTEM

To: Deputy Directors
Chief Administrative Officers
Chief Education Program Specialist
All School Office Personnel
All Others Concerned

1. In line with the school's continuing efforts to improve document management, strengthen accountability, and promote efficient inter-office transactions, all concerned divisions and offices are hereby directed to participate in the school-wide roll-out of the **Document Tracking and Routing System**, effective November 9, 2026.

2. The system shall serve as a common mechanism for tracking the transmission, receipt, forwarding, processing, and completion of official documents between covered divisions and offices. All concerned personnel shall observe the prescribed procedures for document registration, barcode/QR code generation and scanning, status updating, and recording of document transactions.

3. For the creation and management of user accounts, the ADAS II and/or one (1) designated personnel from each division shall coordinate with **Rennor C. Clavel**, Information System Analyst II (ISA), for the collection and consolidation of division account details and access requirements. All concerned divisions shall submit the necessary information through their respective assigned personnel to facilitate account setup and system access prior to implementation.

4. For guidance and uniform implementation, the following annexes are attached to and shall form an integral part of this Memorandum.

   a) **Annex A** – Document-Specific Tracking and Routing Procedures
   b) **Annex B** – General Tracking and Routing Rules
   c) **Annex C** – Proposed Tracking Data Fields
   d) **Annex D** – Document Status Definitions
   e) **Annex E** – Means of Verification (MOVs)

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f) **Annex F** – Initial Implementation Scope Map

5. All division and office heads are requested to orient their respective personnel on the prescribed procedures and ensure compliance within their respective areas of responsibility. The ICT Unit and Planning and Development Unit shall jointly provide the necessary technical assistance, process guidance, monitoring, and evaluation during implementation.

6. For the initial roll-out, the system shall cover document transactions between the identified divisions and offices. Internal document routing and tracking within a single division are excluded from the initial implementation and may be considered for a future phase, subject to evaluation and approval.

7. The system shall complement existing physical document processing and shall not replace required signatures, approvals, or established records management procedures. Any implementation concerns, technical issues, or recommendations for process improvement shall be coordinated with the ICT Unit and Planning and Development Unit.

8. Strict compliance with this Memorandum and its attached annexes is hereby enjoined.

9. For information, guidance, and compliance.

MIA ARIANA P. TANCIONGCO, PhD
Director III / School Director

Encl.: DOCUMENT TRACKING & ROUTING SYSTEM
Reference:
To be indicated in the Perpetual Index
Under the following subjects

MEMO PROCESS INNOVATION

OSD01/OSD07 NOVEMBER 5, 2026

ANNEX A

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DOCUMENT-SPECIFIC TRACKING AND ROUTING PROCEDURES

Scope Note

- The routing procedures in this Annex shall be interpreted within the initial scope of the project.
- The Document Tracking and Routing System shall track the movement of documents when they are transmitted, forwarded, or routed between the identified divisions and offices.
- It shall not yet track internal routing and processing occurring entirely within a single division or office.
- For purposes of system tracking, the relevant transaction shall be recorded when the document is:
    1. forwarded/transmitted by the originating covered division or office; and/or
    2. received by the next covered division or office.
- Any internal processing that occurs before or after such inter-division/inter-office transmission shall remain under the existing internal procedures of the concerned division unless specifically included in a future approved expansion.

I. PROJECT PROPOSAL

A. The Originating Division's ADAS II/assigned personnel creates the document and generates a barcode/QR code to be printed on the first page. The document is processed and forwarded for the next step. The physical copy is also forwarded to Finance Division for funds verification.

B. Finance Division's ADAS II/assigned personnel scans or manually inputs the code printed on the first page of the physical document to verify and accept the document in the system and conduct funds verification.

C. Once funds are verified by Finance Division and the document is signed, Finance Division's ADAS II/assigned personnel processes and forwards the document to the Deputy Director's Office in the system, together with the physical copy, for initial signature.

D. The Deputy Director's ADAS II/assigned personnel receives the physical document and scans the code to verify the transaction in the system.

E. Once signed by the Deputy Director, ADAS II/assigned personnel processes and forwards the document in the system and physical copy to the Office of the School Director for final signature/approval.

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F. School Director's ADAS III/assigned personnel shall receive and verify the documents in the system and forward the physical copies to the School Director for signature.

G. Once approved by the School Director, ADAS III/assigned personnel approves the transaction in the system and forwards the document to the next division to end the process. The physical copy is forwarded to the next division for scanning/input of the code.

**Note: Official Documents originating from the Finance and/or Administrative Division shall be countersigned by the Deputy Director for Finance & Administration, likewise, Official Documents originating from the Academic and/or Student Affairs Division shall be countersigned by the Deputy Director for Student & Academic Affairs as stated in School Memorandum No. 146, s. 2026.*

END PROCESS

II. SCHOOL/OFFICE MEMORANDUM AND SCHOOL ADVISORY

A. The Originating Division's ADAS II/assigned personnel creates the document in the system and generates a barcode/QR code to be printed on the front page. The document is processed and forwarded in the system to the Deputy Director of their respective division. The physical copy is also forwarded.

B. The Deputy Director's ADAS II/assigned personnel receives the physical document and scans/inputs the barcode to verify the document in the system.

C. Once signed by the Deputy Director, ADAS III/assigned personnel processes and forwards the document in the system, while the physical copy is forwarded to the Office of the School Director.

D. The School Director's ADAS III/assigned personnel scans/inputs the barcode to verify and accept the document. Physical copies are forwarded to the School Director for signature.

E. Once signed by the School Director, ADAS III/assigned personnel approves the document in the system and forwards it to the Originating Division together with the physical copy.

F. The Originating Division's ADAS II/assigned personnel scans/inputs the code to verify and accept the document in the system.

**Note: Official Documents originating from the Finance and/or Administrative Division shall be countersigned by the Deputy Director for Finance & Administration, likewise, Official Documents originating from the Academic and/or Student Affairs Division shall be countersigned by the Deputy Director for Student & Academic Affairs as stated in School Memorandum No. 146, s. 2026.*

END PROCESS

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III. DISBURSEMENT VOUCHER (DV) AND OBLIGATION & REQUEST STATUS (ORS)

A. The Originating Division's ADAS II/assigned personnel creates the document and generates a barcode in the system to be printed on the front/title page of the school copy. The document is processed and forwarded to the Finance Division for signature.

B. The Finance Division's ADAS II/assigned personnel scans/inputs the code to verify the document.

C. Once the Disbursement Voucher (DV) and Obligation & Request Status (ORS) are signed by the School Accountant and Budget Officer, ADAS II/assigned personnel processes and forwards the document to the Deputy Director for Finance and Administration's office together with the physical copy.

D. The ADAS II/assigned personnel of the Deputy Director for Finance and Administration shall scan/input and verify the code for processing and signature of the DV and ORS forms.

E. Once the DV and ORS are signed, ADAS II/assigned personnel processes and forwards the document to the Office of the School Director for final approval. Physical copies are also forwarded.

F. School Director's ADAS III/assigned personnel scans/inputs the code to verify the documents and processes them for signature.

G. Once the DV and ORS are signed and no further signatures are required, ADAS III/assigned personnel shall approve the document in the system and forward it to the Administrative Division for final processing. Physical copies are also forwarded.

H. Administrative Division's ADAS II/assigned personnel scans/inputs the code to verify and receive the document.

END PROCESS

IV. CSC FORM 6

A. Administrative Division's ADAS II/assigned personnel creates the document in the system for bulk Form 6 signature, indicating the number of forms in the description. A barcode/QR code is generated and printed on the cover page. The physical and system-generated copies are processed and forwarded to the Deputy Director for Finance & Administration for counter-signature.

B. The ADAS II/assigned personnel of the Deputy director for Finance & Administration shall scan/input the code to verify and receive the document.

C. Once signed by the Deputy Director for Finance & Administration, ADAS II/assigned personnel shall process and forward the document in the system and forwards the

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physical and system-generated copies to the Office of the School Director for final signature.

D. School Director's ADAS III/assigned personnel shall scan and verify the code in the system and forward the physical copies to the School Director for signature.

E. Once the CSC Form 6 are signed, ADAS III/assigned personnel shall approve the document in the system and forward it to the Administrative Division along with the physical copies of the documents.

F. Administrative Division ADAS II/assigned personnel scans/inputs the code to receive the signed Form 6.

END PROCESS

V. OTHER/MISCELLANEOUS DOCUMENTS

A. The Originating Division creates the document in the system, generates a barcode/QR code, and processes and forwards the system-generated and physical copies to the next receiving division.

B. The process shall continue following the sequence of processing and forwarding until the document has completed all required actions.

END PROCESS

VI. COMMUNICATION

A. Letters received from external stakeholders/clients are received directly by the Office of the School Director through the ADAS III/assigned personnel for routing.

B. ADAS III/assigned personnel creates the document in the system, generates a barcode/QR code, and routes the system-generated and physical document to the respective Deputy Directors as instructed by the School Director.

C. Deputy Director/s' ADAS II/assigned personnel scans/inputs the code in the system to verify and receive the document for processing.

D. Deputy Director/s' ADAS II/assigned personnel processes and forwards the physical and system-generated document to the next division as instructed.

E. The receiving division receives the document for processing/action. Once action has been taken, the receiving division ADAS II/assigned personnel ends the process by marking the document as **DONE**.

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F. If the routed document requires a reply letter, the receiving division's ADAS II/assigned personnel creates a **new document** with a new description and title and forwards it to the next receiving division.

G. The next receiving division follows the proper tracking and routing procedures until the new document is completed.

END PROCESS

VII. PROCUREMENT

A. Originating Division's ADAS II/assigned personnel shall create a document in the system, generate barcode/qr code and submit both system generated and physical document of Purchase Request (PO) to Bids and Awards Committee (BAC) Sec Chairperson or assigned BAC Sec Member for processing.

B. BAC Sec Chairperson or Member shall scan/input the code to verify and receive the documents. The PR documents shall follow the internal BAC Sec processing of the documents.

C. Once the PR documents have completed the internal BAC process, BAC Sec Member shall forward the document both system generated and physical copies to the Office of the School Director for signature.

D. School Director's ADAS III/assigned personnel shall verify the code in the system to verify the documents, physical copies are forwarded to the School Director for approval.

E. Once the documents are signed, ADAS III/assigned personnel shall approve the document in the system and forward it to the BAC Sec Chairperson or Member along with the physical copies of the document.

F. BAC Sec Chairperson or Member shall forward the complete procurement documents to the Administrative Division for final processing.

G. Administrative Division's ADAS II/assigned personnel shall verify and receive the documents in the system and follow the internal processing of the documents within the Administrative Division.

END PROCESS

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ANNEX B

GENERAL DOCUMENT TRACKING RULES

1. Origination Division shall create the document complete with title and description.
2. Each document shall be assigned a unique tracking number.
3. A barcode/QR code shall be generated for every registered document.
4. The barcode/QR code shall be printed on the first page or designated cover page.
5. The same tracking code shall be used throughout the routing of the same document.
6. Each receiving office shall scan or manually input the code to record receipt.
7. Both the system-generated record and physical document shall be routed according to the approved workflow.
8. Official signatures and approvals shall remain part of the physical document process.
9. System approval shall serve as a transaction record and shall not replace the required official signature or approval.
10. A new reply letter or new document shall be registered using a new tracking code.
11. Only authorized personnel shall be given access to relevant system functions.
12. In case of system downtime, the approved manual contingency procedure shall be followed and the transaction shall be updated in the system once access is restored.
13. Completed transactions shall be marked **DONE**.
14. The initial tracking scope begins at the inter-division/inter-office transmission or forwarding point and ends upon completion of the covered inter-division/inter-office routing process.
15. Internal routing and tracking within a single division or office shall not be recorded as part of the initial system implementation.

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ANNEX C

PROPOSED TRACKING DATA FIELDS

The system may contain the following information fields:

- Tracking Number;
- Barcode/QR Code;
- Document Title (e.g. Project Proposal, Form 6, Memo, etc.);
- Document Description (e.g. Pukaw_date, Travel Reimbursement, 36 Form 6, etc.);
- Document Type;
- Originating Division/Office;
- Date Created;
- Current Receiving Division/Office;
- Assigned Personnel;
- Date and Time Received;
- Current Status;
- Action Taken;
- Remarks;
- Return/Revision Reason;
- Signature/Approval Status;
- Date Forwarded;
- Date Completed;
- Completion/DONE Status; and
- Transaction History.

For **CSC Form 6**, the document description shall indicate the number of forms included in the transaction.

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ANNEX D

PROPOSED DOCUMENT STATUS DEFINITIONS

Status	Definition
PENDING	Document has been created in the system by the originating division, assigned a tracking code, awaiting to be processed and forwarded to the next receiving division.
FORWARDED	Document has been forwarded to the next division, waiting for verification.
RECEIVED	Document has been received by the designated office
ACTED/COMPLETED/DONE	Document required action is processed and done by the receiving division, process is complete
FOR REVISION	Document is returned for revision and returned to originating division
DISAPPROVED	Document is disapproved and returned to originating division
APPROVED	Document is approved by the School Director and forwarded to the next receiving division to complete the process

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ANNEX E

MEANS OF VERIFICATION

The following documents and records may serve as Means of Verification (MOVs):

1. Approved Innovation Proposal;
2. Approved Document Tracking and Routing Procedures;
3. Consultation documentation;
4. Attendance sheets;
5. Consultation minutes;
6. Process maps;
7. Validated routing matrix;
8. Workflow validation workshop documentation;
9. Technical requirements documentation;
10. System development/configuration documentation;
11. System screenshots or sample transaction records;
12. Training materials;
13. Training attendance sheets;
14. System testing results;
15. Issue and troubleshooting logs;
16. Pilot implementation report;
17. User feedback results;
18. Monitoring and evaluation reports;
19. Baseline and post-implementation processing data;
20. Accomplishment Report; and
21. Recommendations for further improvement and institutionalization.

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ANNEX F

INITIAL IMPLEMENTATION SCOPE MAP

- The initial system shall establish tracking across the following organizational points:

Academic Affairs Division
↕
Office of the Deputy Director for Academic and Student Affairs
↕
Student Affairs Division
↕
Office of the School Director
↕
Office of the Deputy Director for Administration and Finance
↕
Finance Division
↕
Administrative Division

- The actual routing sequence shall vary depending on the document type and approved workflow.

- The arrows represent potential **inter-division/inter-office transmission and receipt points** and do not mean that every document shall pass through all identified offices.

Scope Boundary

COVERED
- **Division/Office A → Division/Office B → Division/Office C**
- The system records the transmission, receipt, forwarding, and completion of the document as it moves between covered divisions/offices.

NOT YET COVERED
- **Personnel/Section A → Personnel/Section B → Personnel/Section C within Division A**
- Internal routing and tracking within the same division or office shall remain under the existing procedures during the initial implementation.
- Such internal routing may be considered for a future phase following evaluation, consultation, process mapping, and management approval.