

Open Records Portal Reference

January 2016

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For additional help, view the Help Center at grama.utah.gov/aro/help-index.html, and read the Frequently Asked Questions at openrecords.utah.gov.

Note on Time Limits

The time limit for answering a request starts when the request is opened (clicked on from the Dashboard). Once the request is received (opened), the agency has **10 business days** to reply, or **5 business days** if the requester has asked for an expedited response. Any requests not *responded to* within the time limit will automatically be denied, and a notice sent to both the ARO and the requester. Any requests not *opened* within the time limit will be likewise denied.

Log In

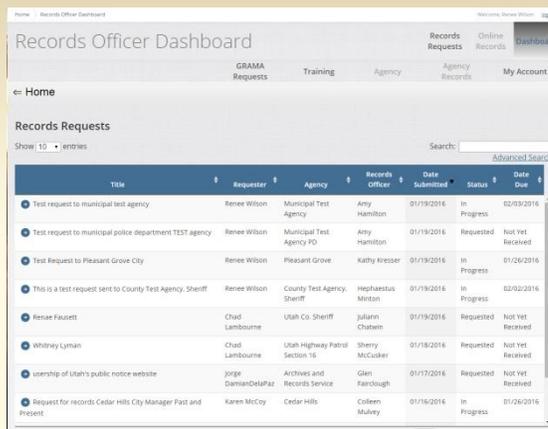
- Go to openrecords.utah.gov
- Click **Login**
- Enter your credentials or create a UMD login
 - If you post to the Public Notice Website, you can use those same login credentials here
- Click on **Dashboard** to view records requests
- You will see the Records Officer Dashboard (shown to the right)

View a Request

- Click on a request in the dashboard
- You will see the Records Request page (shown on next page)

View Completed Requests

- From the Dashboard, click **Advanced Search**
- Change the “Only open requests?” option from **Yes** to **No**
- Click **Apply Filter**



The screenshot shows the Records Officer Dashboard with a table of records requests. The table has columns for Title, Requester, Agency, Records Officer, Date Submitted, Status, and Date Due. The requests listed include various municipal and county agencies, with statuses ranging from 'In Progress' to 'Requested' and 'Not Yet Received'.

Title	Requester	Agency	Records Officer	Date Submitted	Status	Date Due
Test request to municipal test agency	Renée Wilson	Municipal Test Agency	Amy Hamilton	01/19/2016	In Progress	02/03/2016
Test request to municipal police department TEST agency	Renée Wilson	Municipal Test Agency PD	Amy Hamilton	01/19/2016	Requested	Not Yet Received
Test Request to Pleasant Grove City	Renée Wilson	Pleasant Grove	Kathy Krieser	01/19/2016	In Progress	01/26/2016
This is a test request sent to County Test Agency, Sheriff	Renée Wilson	County Test Agency, Sheriff	Hephastus Minton	01/19/2016	In Progress	02/02/2016
Renae Faustett	Chad Lambourne	Utah Co. Sheriff	Julian Chapman	01/19/2016	Requested	Not Yet Received
Whitney Lyman	Chad Lambourne	Utah Highway Patrol Section 16	Sherry McCook	01/18/2016	Requested	Not Yet Received
Ownership of Utah's public notice website	Jorge DamianDotaPaz	Archives and Records Service	Glen Fairbough	01/17/2016	Requested	Not Yet Received
Request for records Cedar Hills City Manager Past and Present	Karen McCoy	Cedar Hills	Colleen Mulvey	01/16/2016	In Progress	01/26/2016

Overview of Records Request Layout

Section 1

Shows the records request as submitted.

Actions you can take:

- **Print** the request
- **Close** the request, if all request portions have been completed
- Choose to respond to the request **outside of the portal**

Section 2

Shows all request portions, statuses, and due dates.

Actions you can take:

- **Select which portion** of the request to view and respond to

Section 3

Shows details about whichever request portion is selected in section 2.

Actions you can take:

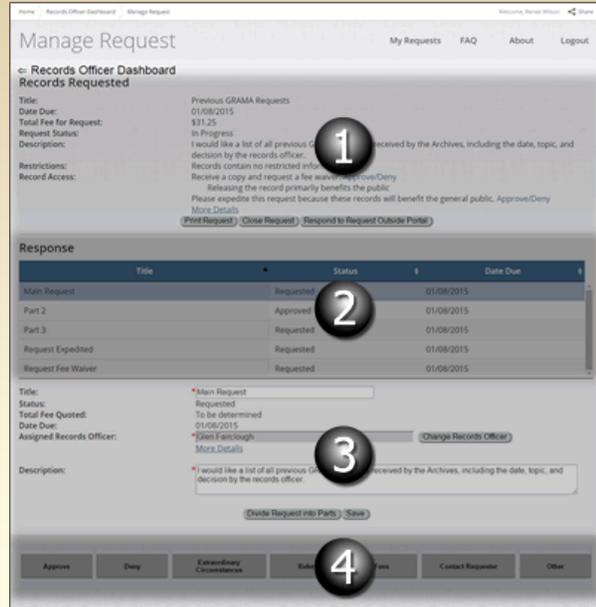
- **Change the records officer** (to someone else in your same agency)
- **Revise the title and description** of the request portion (this does not change the original request)
- **Divide the request** into parts

Section 4

Shows your options for responding to the request portion.

Actions you can take:

- **Approve** or **deny** the request
- Claim **extraordinary circumstances** for the request
- **Refer** the requester to a different agency (if the request does not pertain to your agency)
- Apply **fees** (for tracking purposes only—fees cannot be collected via the portal)
- **Contact** the requester
- Add **tasks** which may be assigned to other individuals (under the **Other** button)
- **Upload a file** for the requester to access (under the **Other** button; you may also do this when approving the request)
- Add **notes** (under the **Other** button)
- View a detailed **log** of the request history (under the **Other** button)



Approve a Request

Approve

- Select the request portion you want to approve
- Click **Approve**
- Enter a note about the approved records
- Select the delivery method
 - Note that there is currently a **30MB limit** on file size
 - Recommended file types include **PDF** and **CSV**
- Click **Approve and Close**
- An email will be sent to the user containing the message you wrote

Deny a Request

Deny

- Select the request portion you want to deny
- Click **Deny**
- Enter the reason for denial, including a legal citation (if applicable) and a description of the records being denied
- Enter CAO's contact information if it didn't auto-populate
- Click **Deny This Request**
- An email will be sent to the user containing the message you wrote and instructions on how to appeal the decision

If the Request Is Not for Your Agency

Refer

*Note: The portal does not transfer the request to a new agency. The requester must submit a **new** request to the correct agency*

- Select the request portion that does not pertain to your agency
- Click **Refer**
 - To refer the requester to a records officer, select **Refer Records Officer**
 - To refer the requester to an agency, select **Refer Government Agency or Office**
 - If the records do not exist, select **Does Not Exist Referral**
 - To just type in the information, select **Free Form Referral**
- Click **Refer**

Claim Extraordinary Circumstances

Extraordinary
Circumstances

- Select the relevant request portion
- Click **Extraordinary Circumstances**
- Select the type of extraordinary circumstance which exists (you may choose more than one)
- Select the date by which the records will be approved, denied, or made available (to the agency)
- Describe the extraordinary circumstances further
- Click **Complete**

Approve Part of a Request

Divide Request into Parts

- Select the main record request portion
- Click **Divide Request into Parts**
- Create a title for the new request portion to be approved
- Change the default records officer, if desired
- Revise the text of the description to reflect the part of the request that will be approved (the original request portion is not affected by this)
- Click **Add Request**
- You may then respond to the original request portion for those records which are denied

Add an Item Fee

Fees

- Select the relevant request portion
- Click **Fees**
- Click **Add Fee**
- Enter a descriptive name for the fee
- Enter a quantity (such as 30 for 30 copies or 30 pages)
- Enter the cost for **one** item—the portal will do the math for you
- Click **Add Fee**
- You may update or cancel the fee by clicking on it

Add an Hourly Fee

Other

- Select the relevant request portion
- Click **Other**
- Click **Tasks**
- Click **Add Task**
- Enter a descriptive title for the task
- Choose whether to assign the task to a records officer (default) or office staff
 - If assigning a task to a staff member, enter the staff member’s name and email address
- Enter the billable rate (wage)
- Enter the date due, if desired
- Add a description, if desired
- Click **Add Task**

Update the fee

- Click on the task
- Enter the number of hours or minutes that were spent on the task
- Update any other details as necessary
- Click **Save** if the task is not completed, or **Complete Task** if the task is done

Upload a File

Other

- Click **Other**
- Click **References**
- Click **Choose File**
- Select the file to upload
- Enter a title, if desired
- Click **Upload**

