Open Records Portal Reference
2017

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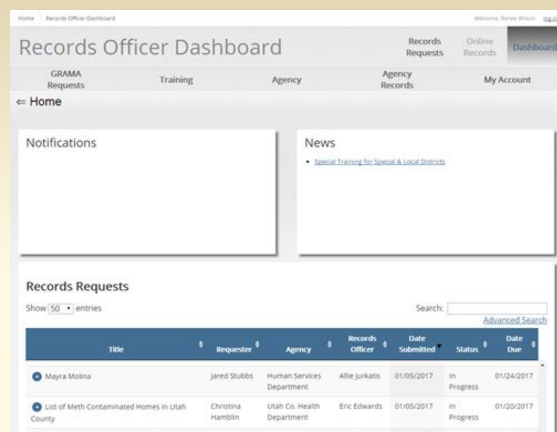
For additional help, view the Help Center at ***grama.utah.gov/aro/help-index.html****, and read the Frequently Asked Questions at* ***openrecords.utah.gov****.*

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
  - Use an email address that is not shared with anyone else in your agency
- Click on **Dashboard** to view upcoming events and records requests (shown to the right)

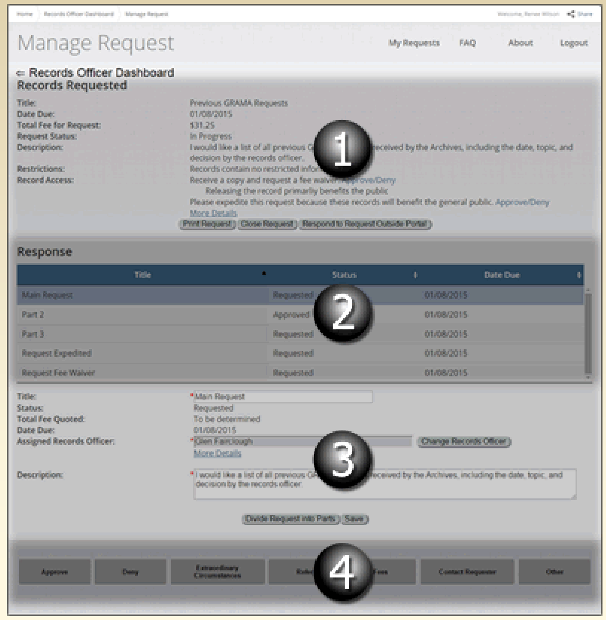
View a Request

- Click the **plus sign** next to a request to preview it without opening it
- Click on a **request** in the dashboard to open it
- 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**

Overview of Records Request Layout



Section 1

Shows the records request as submitted.

Actions you can take:

- **Print** the request
- 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 (fee waiver request, expedited request, main request)

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 acting on the request portion.

Actions you can take:

- **Approve** or **deny** the request portion
- Claim **extraordinary circumstances** for the request portion
- **Refer** the requester to a different agency (if the request does not pertain to your agency), or tell the requester why the records **do not exist**
- Specify **fees** (for tracking purposes only—fees cannot be collected via the portal)
- **Contact** the requester (sends an email)
- Add **tasks** which may be assigned to other individuals (under the **Other** button)
- **Upload a file** for the requester ("References" under the **Other** button; you may also upload a file 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
- Click **Approve**
- 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 the information 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 records requests to a new agency; the requester must submit a ***new*** *request to the correct agency*

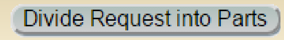
- Select the request portion that does not pertain to your agency
- Click **Refer**
    - To refer the requester to a records officer, select **Refer Records Officer**
    - To refer the requester to an agency, select **Refer Government Agency or Office**
    - If the records do not exist, select **Does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

Claim Extraordinary Circumstances

Extraordinary Circumstances

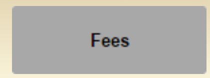
- Select the relevant request portion
- Click **Extraordinary Circumstances**
- Select the type of extraordinary circumstance which exists (you may choose more than one)
- Select the date by which the records will be approved, denied, or made available to the agency
- Describe the extraordinary circumstances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

Approve Part of a Request



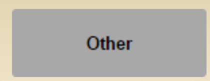
- Select the main record request portion
- Click **Divide Request into Parts**
- Create a title for the new request portion to be approved
- Change the default records officer, if desired
- Revise the text of the description to reflect the part of the request that will be approved (the original request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

Add an Item Fee



- 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

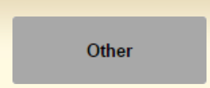


- Select the relevant request portion
- Click **Other**
- Click **Tasks**
- Click **Add Task**
- Enter a descriptive title for the task
- Choose whether to assign the task to a records officer (default) or office staff
  - If assigning a task to a staff member, enter the staff member's name and email 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



- Click **Other**
- Click **References**
- Click **Choose File**
- Select file (30 MB limit)
- Enter a title, if desired
- Click **Upload**