THE OPEN RECORDS PORTAL

Renée Wilson, Open Records Portal Administrator
Utah State Archives & Records Service
January 2016

Where This All Came From: SB-70

- Modified Open Utah website to include
    - Online GRAMA requests
    - Links to online records
    - And more
- SB-70 became part of Utah Code 63A-3-403

Utah Code 63A-3-403

(11) The department shall, in consultation with the board and as funding allows, modify the information website described in Subsection (10) to:

...

(b) by January 1, 2016, serve as a point of access for Government Records Access and Management requests for:

(i) school districts;

(ii) charter schools;

(iii) public transit districts created under Title 17B, Chapter 2a, Part 8, Public Transit District Act;

(iv) counties; and

(v) municipalities;

...

(d) except as provided in Subsection (12)(a), provide link capabilities to other existing repositories of public information, including maps, photograph collections, legislatively required reports, election data, statute, rules, regulations, and local ordinances that exist on other agency and political subdivision websites;

Utah Code 63A-3-403

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SITE OVERVIEW

openrecords.utah.gov

| Cities | Transit Districts | School Districts/Schools |

☰ How It Works

- Find the governmental entity you want to contact and select the Request Records button for that agency

- If you do not already have an account with the State of Utah to connect to online services, you will create one here.

- Fill out the online form, including a detailed description❓ of the records you want, then click Submit

- You will receive a response within the time limit allowed by law.❓

- To review your submission and track the progress of your request, click on Records Requests

☰ Reports

Statistics for Entities

Statistics for Dates

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Help for Records Officers

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Not sure where to start? Take a look at the basics, or view the Open Records Portal reference sheet (PDF).

A

coming soon! Add a note

Appeals

coming soon! Apply extraordinary circumstances

Approvals

Approve a fee waiver request

Approve an expedited request

Approve a records request

coming soon! Assign tasks

FAQ

Login

⇐ Home

Topics

Common Record Requests

Criminal Records

Fees

GRAMA Appeals Process

GRAMA Records Request

General

How to Use Portal

Ombudsman

Records Officers

Time Limits

Questions

▸ Can other people besides the records officer answer the request through the portal?

▸ Do I have to use the Portal to answer requests?

▸ Do appointed records officers (ARO) require training?

▸ How do I forward a request to someone else?

▸ How do I know if someone submitted a request?

▸ How do I register as a new records officer?

▸ How do I turn email notifications off/on?

▸ My agency/personal information is wrong! How do I change it?

▸ What if the request is for someone else's records?

▸ When does the 10-day time limit start?

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| Cities | Transit Districts | School Districts/Schools |

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☰ Reports

Statistics for Entities

Statistics for Dates

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☰ Contact Us

Please contact us with any questions:

Open Records Website Administrator: Renée Wilson
openrecordsadmin@utah.gov
801-531-3842

GRAMA Portal Administrator: Nova Dubovik
ndubovik@utah.gov
801-531-3834

Utah Government Records Ombudsman: Rosemary Cundiff
grama@utah.gov
801-531-3858

Social Media
Google+
YouTube

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GRAMA PORTAL FAQS

Frequently Asked Questions

- ## Do I have to use it?

  - Yes! But not entirely. (But we hope you will!)

  - If you receive a request via the portal, you must access it from the portal.

  - You are not required to use the portal to respond. You can respond outside the portal if you prefer.

To Respond Outside of Portal

Frequently Asked Questions

- When does the time limit start for answering the request?

  - When the request is opened, the clock starts OR

  - If the request is unopened for 10 business days, it is considered a denial

    - Hopefully I'll hunt you down before then

Frequently Asked Questions

- How do I know if I have a request?
  - You'll receive an email notification
  - Contact your analyst if you would like the notifications to go to a specific email

Frequently Asked Questions

- Are the requests public?
  - No
  - GRAMA requests have a suggested designation of public, BUT
  - Each agency classifies their own records, including GRAMA requests
  - Only the requester, records officer, and web admin can see the requests
  - We discourage requesters from including sensitive information

Frequently Asked Questions

- Are the requests kept forever?
  - No
  - Requests will be deleted after 2 years, according to state schedule 1-64

Frequently Asked Questions

- Can people abuse the system?
    - Not easily
    - Requests can only be sent to one agency at a time
    - If you believe someone is spamming agencies, please contact Renée Wilson at openrecordsadmin@utah.gov

Frequently Asked Questions

- Do I need to create an account?
  - Yes
  - You'll create a Utah Master Directory (UMD) account (if you don't already have one)
  - The portal will guide you through the process step by step

UMD Registration Tips

- Use the same email that the Archives has on file (the one that we send emails to)
  - Not sure what it is? Email your analyst
- Use an individual work email address, not a generic work email
  - We can update your email in our system; email your analyst
- Make sure your email is not already associated with a UMD account
  - Go to login.utah.gov to verify account details

GRAMA PORTAL: HOW IT WORKS

How it Works

- Requester finds agency
- Requester submits request
- Agency is notified they have a request
- Agency responds to request

Successfully Logged In

Request Form

My Profile   My Requests   FAQ   About   Logout

← Home

Search Agencies

Utah Code § 63G-2-204 (GRAMA) requires a person making a records request furnish the governmental entity with a written request containing the requester's name, mailing address, daytime telephone number (if available); and a description of the record requested that identifies the record with reasonable specificity.

Request Made To

Government Agency or Office: Test Agency
Address: 346 South Rio Grande Street
City: Salt Lake City
State: UT
Zip Code: 84101

This is not the right agency

Records Requested

Title of Request: * [Title]

Description of records being requested: * [Please describe exactly what record you are requesting, including location of event(s) described in record, city, county, address, date range, names of person(s), and subject of the request. Please do not submit any confidential information such as social security number or account numbers.]

Date Range of records being requested: [Year ▼] [Month ▼] [Day ▼] 📅 To [Year ▼] [Month ▼] [Day ▼] 📅

Requester's Information

Name: Renee Wilson
Address: * [PO Box 3362]
           [Mailing Address Line 2]
City: *   [Salt Lake City]
State: *   [Utah]
Country: [Country]
Zip Code: * [84110]
Phone: *   [801-531-3842] ☐ Not Applicable
Use as defaults? ☐

Restricted Records:

Note: If the record has a restricted access, GRAMA provides that certain individuals may still receive access, provided that one of the following applies:

☐ I am the subject of the record
☐ I am the authorized representative of the subject of the record ❓
☐ I provided the information in the record
☑ I have a power of attorney or notarized release from the subject of the record ❓

Considerations about the desired response *

I would like to:
○ View or inspect the records only
○ Receive a copy of the records and pay associated fees
   Please notify me if the amount will exceed $[5]
● Receive a copy of the records and request a fee waiver. According to Utah Code §63G-2-203
   ☐ Releasing the record primarily benefits the public
   ☐ I am the subject, or authorized representative, of the record
   ☐ My legal rights are directly implicated by the information of the record because [   ] ,and I am impecunious

○ Receive an expedited response (5 days) because releasing the record benefits the public; I request the information for a story or report for publication or broadcast to the general public

[Submit Request] [Submit and Upload Documents]

GRAMA requests are public information. See State General Schedule 1-64: Records Access Requests and Appeals

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Date Range of records being requested: Year ▾ Month ▾ Day ▾ To Year ▾ Month ▾ Day ▾

Requester's Information

Name:	Renee Wilson
Address:	*PO Box 3382

Records Requested

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Records Requested

Requester's Information

Name: Renee Wilson

Address: * PO Box 3362

                 Mailing Address Line 2

City: * Salt Lake City

State: * Utah

Country: Country

Zip Code: * 84110

Phone: * 801-531-3842   ☐ Not Applicable

Use as defaults?   ☐

Considerations about the desired response*

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     ☐ Releasing the record primarily benefits the public
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Country:	Country
Zip Code:	*84110
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Welcome, Renee Wilson   Share

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Name: Renee Wilson

Address: * PO Box 3362

Mailing Address Line 2

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Submit Request   **Submit and Upload Documents**

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RECORDS OFFICER INTERFACE FOR GRAMA PORTAL

Records Officer Dashboard

Records Requests   Online Records   **Dashboard**

GRAMA Requests   Training   Agency   Agency Records   My Account

⇐ Home

Records Requests

Show 10 entries

Search: _____

Advanced Search

Title	Requester	Agency	Records Officer	Date Submitted	Status	Date Due
⊕ Test request to municipal test agency, level 1	Renee Wilson	Municipal Test Agency	Amy Hamilton	01/07/2016	In Progress	01/14/2016
⊕ This is a test request to a county agency	Renee Wilson	County Test Agency	Hephaestus Minton	01/07/2016	Requested	Not Yet Received
⊕ This is a test request for Mountain Heights Academy	Renee Wilson	Mountain Heights Academy	DeLaina Tonks	01/07/2016	Requested	Not Yet Received
⊕ This is a test request	Renee Wilson	Cache Valley Transit District	Ivy Thomson	01/07/2016	In Progress	01/14/2016
⊕ Commissioner Kelly Ercanbrack	Karen McCoy	Utah Co.	Aileen Conder	01/05/2016	In Progress	01/13/2016
⊕ Commissioner Samuel Otterstrom	Karen McCoy	Utah Co.	Aileen Conder	01/05/2016	In Progress	01/13/2016
⊕ Commissioner Glen Roberts	Karen McCoy	Utah Co.	Aileen Conder	01/05/2016	In Progress	01/13/2016
⊕ Commissioner James Dain	Karen McCoy	Utah Co.	Aileen Conder	01/05/2016	In Progress	01/13/2016

Previous   1   2   Next

Request marked as received

Manage Request

Reports   My Profile   Dashboard   FAQ   About   Logout

⬅ Records Officer Dashboard

Records Requested

Title:	Open Records Portal Administrator's emails
Date Due:	09/21/2015
Total Fee for Request:	To be determined
Request Status:	In Progress
Description:	I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.
Restrictions:	Records contain no restricted information
Record Access:	Receive a copy and request a fee waiver. Approve/Deny
	Releasing the record primarliy benefits the public
	Please expedite this request because these records will benefit the general public. Approve/Deny
	More Detail

(Print Request) (Close Request) (Respond to Request Outside Portal)

Request Portions ❓

Title ▲	Status ⬍	Date Due ⬍
Main Request	Open	09/21/2015
Request Expedited	Open	09/21/2015
Request Fee Waiver	Open	09/21/2015

Title:	* Main Request
Status:	Open
Total Fee Quoted:	To be determined
Date Due:	09/21/2015
Assigned Records Officer:	* Kendra Yates (Change Records Officer)
	More Detail
Description:	* I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.

(Divide Request into Parts) (Save)

| Approve | Deny | Extraordinary Circumstances | Refer | Fees | Contact Requester | Other |

Request marked as received

Manage Request

Reports   My Profile   Dashboard   FAQ   About   Logout

← Records Officer Dashboard
Records Requested

Title:	Test request to municipal test agency, level 1
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Total Fee for Request:	To be determined
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Main Request	Open	09/21/2015
Request Expedited	Open	09/21/2015
Request Fee Waiver	Open	09/21/2015

Title:	*Main Request
Status:	Open
Total Fee Quoted:	To be determined
Date Due:	09/21/2015
Assigned Records Officer:	*Kendra Yates Change Records Officer
	More Detail
Description:	*I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.

Divide Request into Parts   Save

Approve | Deny | Extraordinary Circumstances | Refer | Fees | Contact Requester | Other

Callout (enlarged)

Title:	Test request to municipal test agency, level 1
Date Due:	01/14/2016
Total Fee for Request:	To be determined
Request Status:	In Progress

Request marked as received

Manage Request

← Records Officer Dashboard
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Description: I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.

Request Portions ?

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Main Request	Open	09/21/2015
Request Expedited	Open	09/21/2015
Request Fee Waiver	Open	09/21/2015

Title:	*Main Request
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Assigned Records Officer:	*Kendra Yates Change Records Officer
	More Detail
Description:	*I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.

Divide Request into Parts   Save

Approve	Deny	Extraordinary Circumstances	Refer	Fees	Contact Requester	Other

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Request marked as received

Manage Request

Reports   My Profile   Dashboard   FAQ   About   Logout

← Records Officer Dashboard
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More Detail

Print Request   Close Request   Respond to Request Outside Portal

Request Portions ❓

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More Detail

Description:	*I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.

Divide Request into Parts   Save

Approve	Deny	Extraordinary Circumstances	Refer	Fees	Contact Requester	Other

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	More Detail
Description:	*I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.

Divide Request into Parts   Save

Approve	Deny	Extraordinary Circumstances	Refer	Fees	Contact Requester	Other

Welcome, Hephaestus Minton   ⤴ Share

Request marked as received

Manage Request

Reports   My Profile   Dashboard   FAQ   About   Logout

← Records Officer Dashboard
Records Requested

Title:	Open Records Portal Administrator's emails
Date Due:	09/21/2015
Total Fee for Request:	To be determined
Request Status:	In Progress
Description:	I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.
Restrictions:	Records contain no restricted information
Record Access:	Receive a copy and request a fee waiver. Approve/Deny
	Releasing the record primarliy benefits the public
	Please expedite this request because these records will benefit the general public. Approve/Deny
	More Detail

(Print Request) (Close Request) (Respond to Request Outside Portal)

Request Portions ❔

Restrictions:	Records contain no restricted information
Record Access:	Receive a copy and request a fee waiver. Approve/Deny
	Releasing the record primarliy benefits the public
	Please expedite this request because these records will benefit the general public. Approve/Deny
	More Detail

(Print Request) (Close Request) (Respond to Request Outside Portal)

Status:	Open
Total Fee Quoted:	To be determined
Date Due:	09/21/2015
Assigned Records Officer:	*Kendra Yates (Change Records Officer)
	More Detail
Description:	*I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.

(Divide Request into Parts) (Save)

| Approve | Deny | Extraordinary Circumstances | Refer | Fees | Contact Requester | Other |

Open.Utah.gov | Data.Utah.gov | Help Center | Contact Us

Request marked as received

Manage Request

Reports   My Profile   Dashboard   FAQ   About   Logout

← Records Officer Dashboard
Records Requested

Title: Open Records Portal Administrator's emails
Date Due: 09/21/2015
Total Fee for Request: To be determined
Request Status: In Progress
Description: I want to see all of the open records portal's administrator's emails about user testing and how and when it
                                was done and with whom.
Restrictions: Records contain no restricted information
Record Access: Receive a copy and request a fee waiver. Approve/Deny
                                    Releasing the record primarliy benefits the public
                                Please expedite this request because these records will benefit the general public. Approve/Deny
                                More Detail

(Print Request) (Close Request) (Respond to Request Outside Portal)

Request Portions ❓

Restrictions: Records contain no restricted information
Record Access: Receive a copy and request a fee waiver. Approve/Deny
                           Releasing the record primarliy benefits the public
                       Please expedite this request because these records will benefit the general public. Approve/Deny
                       More Detail

Close Request   Respond to Request Outside Portal

Status: Open
Total Fee Quoted: To be determined
Date Due: 09/21/2015
Assigned Records Officer: *Kendra Yates   (Change Records Officer)
                        More Detail

Description: *I want to see all of the open records portal's administrator's emails about user testing and how and when it
                        was done and with whom.

(Divide Request into Parts) (Save)

| Approve | Deny | Extraordinary Circumstances | Refer | Fees | Contact Requester | Other |

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Request marked as received

Manage Request

Reports   My Profile   Dashboard   FAQ   About   Logout

← **Records Officer Dashboard**
Records Requested

Title:	Open Records Portal Administrator's emails
Date Due:	09/21/2015
Total Fee for Request:	To be determined
Request Status:	In Progress
Description:	I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.
Restrictions:	Records contain no restricted information
Record Access:	Receive a copy and request a fee waiver. Approve/Deny
	Releasing the record primarliy benefits the public
	Please expedite this request because these records will benefit the general public. Approve/Deny
	More Detail

Print Request   Close Request   Respond to Request Outside Portal

Request Portions ❓

Restrictions:	Records contain no restricted information
Record Access:	Receive a copy and request a fee waiver. Approve/Deny
	Releasing the record primarliy benefits the public
	Please expedite this request because these records will benefit the general public. Approve/Deny
	More Detail

Print Request   Close Request   Respond to Request Outside Portal

Status:	
Total Fee Quoted:	To be determined
Date Due:	09/21/2015
Assigned Records Officer:	*Kendra Yates Change Records Officer
	More Detail
Description:	*I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.

Divide Request into Parts   Save

Approve	Deny	Extraordinary Circumstances	Refer	Fees	Contact Requester	Other

Request marked as received

Manage Request

Reports   My Profile   Dashboard   FAQ   About   Logout

← Records Officer Dashboard
Records Requested

Title: Open Records Portal Administrator's emails
Date Due: 09/21/2015
Total Fee for Request: To be determined
Request Status: In Progress
Description: I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.
Restrictions: Records contain no restricted information
Record Access: Receive a copy and request a fee waiver. Approve/Deny
                             Releasing the record primarliy benefits the public
                         Please expedite this request because these records will benefit the general public. Approve/Deny
                         More Detail
[Print Request] [Close Request] [Respond to Request Outside Portal]

Request Portions ❓

Status: Open
Total Fee Quoted: To be determined
Date Due: 09/21/2015
Assigned Records Officer: *Kendra Yates   [Change Records Officer]
                          More Detail

Description: *I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.

[Divide Request into Parts] [Save]

[Approve] [Deny] [Extraordinary Circumstances] [Refer] [Fees] [Contact Requester] [Other]

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Request marked as received

Manage Request

Reports   My Profile   Dashboard   FAQ   About   Logout

← Records Officer Dashboard
Records Requested

Title:	Open Records Portal Administrator's emails
Date Due:	09/21/2015
Total Fee for Request:	To be determined
Request Status:	In Progress
Description:	I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.
Restrictions:	Records contain no restricted information
Record Access:	Receive a copy and request a fee waiver. Approve/Deny
	Releasing the record primarliy benefits the public
	Please expedite this request because these records will benefit the general public. Approve/Deny
	More Detail

[Print Request] [Close Request] [Respond to Request Outside Portal]

Request Portions ❓

Title ▲	Status ⇕	Date Due ⇕
Main Request	Open	09/21/2015
Request Expedited	Open	09/21/2015
Request Fee Waiver	Open	09/21/2015

Title:	*Main Request
Status:	Open
Total Fee Quoted:	To be determined
Date Due:	09/21/2015

Request Portions ❓

Title ▲	Status ⇕	Date Due ⇕
Main Request	Open	01/14/2016
Request Expedited	Open	01/14/2016
Request Fee Waiver	Open	01/14/2016

Request marked as received

Manage Request

Reports   My Profile   Dashboard   FAQ   About   Logout

⇐ Records Officer Dashboard

Title:	* Main Request
Status:	Open
Total Fee Quoted:	To be determined
Date Due:	01/14/2016
Assigned Records Officer:	* Amy Hamilton [Change Records Officer]
	More Detail

Description: * Enter text here to describe the records you want to request, etc. etc.

[Divide Request into Parts] [Save]

Request Portions ❓

Title	▲	Status	⬍	Date Due	⬍
Main Request		Open		09/21/2015	
Request Expedited		Open		09/21/2015	
Request Fee Waiver		Open		09/21/2015	

Title:	* Main Request
Status:	Open
Total Fee Quoted:	To be determined
Date Due:	09/21/2015
Assigned Records Officer:	* Kendra Yates [Change Records Officer]
	More Detail

Description: * I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.

[Divide Request into Parts] [Save]

Approve	Deny	Extraordinary Circumstances	Refer	Fees	Contact Requester	Other

Request marked as received

Manage Request

Reports   My Profile   Dashboard   FAQ   About   Logout

← Records Officer Dashboard

Title: * Main Request
Status: Open
Total Fee Quoted: To be determined
Date Due: 01/14/2016
Assigned Records Officer: * Amy Hamilton   (Change Records Officer)
More Detail

Description: * Enter text here to describe the records you want to request, etc. etc.

(Divide Request into Parts) (Save)

Request Portions ❓

Title	Status	Date Due
Main Request	Open	09/21/2015
Request Expedited	Open	09/21/2015
Request Fee Waiver	Open	09/21/2015

Title: * Main Request
Status: Open
Total Fee Quoted: To be determined
Date Due: 09/21/2015
Assigned Records Officer: * Kendra Yates   (Change Records Officer)
More Detail

Description: * I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.

(Divide Request into Parts) (Save)

| Approve | Deny | Extraordinary Circumstances | Refer | Fees | Contact Requester | Other |

Request marked as received

Manage Request

Reports   My Profile   Dashboard   FAQ   About   Logout

← Records Officer Dashboard
Records Requested

Title:	Open Records Portal Administrator's emails
Date Due:	09/21/2015
Total Fee for Request:	To be determined
Request Status:	In Progress
Description:	I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.
Restrictions:	Records contain no restricted information
Record Access:	Receive a copy and request a fee waiver. Approve/Deny
	Releasing the record primarliy benefits the public
	Please expedite this request because these records will benefit the general public. Approve/Deny
	More Detail

Print Request   Close Request   Respond to Request Outside Portal

Request Portions ?

Title ▲	Status ⬍	Date Due ⬍

| Approve | Deny | Extraordinary Circumstances | Refer | Fees | Contact Requester | Other |

Total Fee Quoted:	To be determined
Date Due:	09/21/2015
Assigned Records Officer:	*Kendra Yates Change Records Officer
	More Detail
Description:	*I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.

Divide Request into Parts   Save

| Approve | Deny | Extraordinary Circumstances | Refer | Fees | Contact Requester | Other |

Approve

Deny

| Approve | Deny | Extraordinary Circumstances | Refer | Fees | Contact Requester | Other |

Deny Request Reason

An e-mail, with this denial reason included, is sent to the requester.

* Please describe the records being denied. Explain why the records are being denied, and include a legal citation. Max 4000 characters.

If you would like to add a person not listed above then you may include their email here: (emails must be seperated by commas)

Additional email addresses to include as BCC - email addresses must be seperated by a comma (max 5000 characters)

The requester has the right to appeal this decision. Appeal must be made within the next 30 days to:

Full Name: * Full name of person to contact for appeals

Business Address: * Business Address

Suite Number or etc...

City: * [▲▼] , UT

Zip Code: * Zip Code

Email: Email

[Deny This Request]

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Deny

Deny

Extraordinary Circumstances

| Approve | Deny | Extraordinary Circumstances | Refer | Fees | Contact Requester | Other |

[Utah C]ode § 63[G-2-204 (4) and 5)] states that the government entity should notify the requester if extraordinary circumstances exist when it cannot immediately approve or deny the request. The notice must include a description of the extraordinary circumstances and the date when the records will be available.

Requester's Information

Name:	[Jenni]e W[at]son
Address:	[P]O B[ox] [3]862
City:	Salt Lake City
State:	Utah
Zip Code:	84110
Phone:	801-531-3842

Record Access Considerations*

The agency determines that due to extraordinary circumstances stated in Utah Code § 63G-2-204(5), it cannot respond within specifed time limits.

☐ Another governmental entity is using the record (five extra days or as soon as reasonably possible)

☐ Another governmental entity is using the record as part of an audit, and returning the record before the completion of the audit would impair the conduct of the audit (as soon as reasonably possible)

☐ The request, or substantial series of requests filed within five working days of each other, is for a voluminous quantity of records or a record series containing a substantial number of records (as soon as reasonably possible)

☐ The governmental entity is currently processing a large number of record requests (as soon as reasonably possible)

☐ The request requires the governmental entity to review a large number of records to locate the records requested (as soon as reasonably possible)

☐ The decision to release a record involves legal issues that require legal counsel analysis (five extra days)

☐ Segregating information that the requester is entitled to inspect from information that the requester is not entitled to inspect requires extensive editing (fifteen extra days)

☐ Segregating information that the requester is entitled to inspect from information that the requester is not entitled to inspect requires computer programming (as soon as reasonably possible)

Description of Extraordinary Circumstances

Date when records will be approved, denied, or made available: *

*Please describe the extraordinary circumstance in detail. Max 4000 characters

Complete

Extraordinary Circumstances

Approve | Deny | **Extraordinary Circumstances** | Refer | Fees | Contact Requester | Other

...Utah Code § 63... (5) state that the governmental entity should notify the requester if extraordinary circumstances exist when it cannot complete or approve or deny the request. The notice must include a description of the extraordinary circumstances and the date when the records will be available.

Requester's Information

Name:
Address:
City: Salt Lake City
State: Utah
Zip Code:
Phone: 801-531-3842

Record Access Considerations*

The agency determines that due to extraordinary circumstances stated in Utah Code § 63G-2-204(5), it cannot respond within specifed time limits.

☐ Another governmental entity is using the record (five extra days or as soon as reasonably possible)

☐ Another governmental entity is using the record as part of an audit, and returning the record before the completion of the audit would impair the conduct of the audit (as soon as reasonably possible)

☐ The request, or substantial series of requests filed within five working days of each other, is for a voluminous quantity of records or a record series containing a substantial number of records (as soon as reasonably possible)

☐ The governmental entity is currently processing a large number of record requests (as soon as reasonably possible)

☐ The request requires the governmental entity to review a large number of records to locate the records requested (as soon as reasonably possible)

☐ The decision to release a record involves legal issues that require legal counsel analysis (five extra days)

☐ Segregating information that the requester is entitled to inspect from information that the requester is not entitled to inspect requires extensive editing (fifteen extra days)

☐ Segregating information that the requester is entitled to inspect from information that the requester is not entitled to inspect requires computer programming (as soon as reasonably possible)

Description of Extraordinary Circumstances

Date when records will be approved, denied, or made available: *

*Please describe the extraordinary circumstance in detail. Max 4000 characters

Complete

| Approve | Deny | Extraordinary Circumstances | Refer | Fees | Contact Requester | Other |

...Utah Code § 30(__ ___) and 5) state that the government entity should notify the requester if extraordinary circumstances exist when it cannot ___ed to approve or deny the requests. The notice must include a description of the extraordinary circumstances and the date when the records will be available.

Requester's Information

Name:	___ W___son
Address:	___ Box 862
City:	Salt Lake City
State:	Utah
Zip Code:	84110
Phone:	801-531-3842

Record Access Considerations*

The agency determines that due to extraordinary circumstances stated in Utah Code § 63G-2-204(5), it cannot respond within specifed time limits.

☐ Another governmental entity is using the record (five extra days or as soon as reasonably possible)

☐ Another governmental entity is using the record as part of an audit, and returning the record before the completion of the audit would impair the conduct of the audit (as soon as reasonably possible)

☐ The request, or substantial series of requests filed within five working days of each other, is for a voluminous quantity of records or a record series containing a substantial number of records (as soon as reasonably possible)

☐ The governmental entity is currently processing a large number of record requests (as soon as reasonably possible)

☐ The request requires the governmental entity to review a large number of records to locate the records requested (as soon as reasonably possible)

☐ The decision to release a record involves legal issues that require legal counsel analysis (five extra days)

☐ Segregating information that the requester is entitled to inspect from information that the requester is not entitled to inspect requires extensive editing (fifteen extra days)

☐ Segregating information that the requester is entitled to inspect from information that the requester is not entitled to inspect requires computer programming (as soon as reasonably possible)

Description of Extraordinary Circumstances

Date when records will be approved, denied, or made available: * [_____]

*___ describe the extraordinary circumstance in detail. Max 4000 characters

[Complete]

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Refer

Approve	Deny	Extraordinary Circumstances	Refer	Fees	Contact Requester	Other

Please choose how to refer this subrequest*

○ Refer Records Officer (if known)

● **Refer Government Agency or Office (if known)**

Search: [   ]

Agency Name ▲
Academy for Math Engineering and Science (Utah)
Agricultural Advisory Board
Alcoholic Beverage Control Commission
Alpine (Utah)
Alpine Conservation District (Utah)

[Select Agency] **Selected:** * [   ]

○ Does Not Exist Referral

○ Free Form Referral

[Refer]

Refer

Fees

Approve	Deny	Extraordinary Circumstances	Refer	Fees	Contact Requester	Other

Search: _____

Date Created ▼	Quantity ⬍	Description ⬍	Price ($) ⬍
01/07/2016 19:59 34	1	Postage	3.54
01/07/2016 19:58 44	3	DVDs for digital files	9.00
01/07/2016 19:57 29	58	Copies of Records Something	2.90

Add Fee

Total: $15.44

Fees

Fees

Fees

Records Requests   Online Records   Dashboard

⇐ Manage Request

Fees

Date Created ▲	Description	Quantity	Cost Per Each	Price($)	Paid	Waived
01/07/2016 19:57 29	Copies of Records Something	58	$ .05	2.90	No	No
01/07/2016 19:58 44	DVDs for digital files	3	$ 3.00	9.00	No	No
01/07/2016 19:59 34	Postage	1	$ 3.54	3.54	No	No

Tasks

Title ▲	Billable Time	Billable Rate	Price($)	Paid	Waived
Contact requester for clarification	.00	20.00	.00	No	No
Research classification of records requested	2.00 Hours	20.00	40.00	No	No

Contact Requester

Other

Other: Tasks

Other: Tasks

Approve	Deny	Extraordinary Circumstances	Refer	Fees	Contact Requester	Other

Show Only Active Tasks

Search: _____

Title ▲	Assigned To ⬍	Status ⬍
Contact requester for clarification	Renee Wilson	In Progress
Research classification of records requested	Renee Wilson	In Progress

Add Task

Duplicate Previous Task: [_____ ⬍]

Title: * [Descriptive Title for Task]

Assign Person:*

🔘 Assign a Records Officer

* [Renee Wilson] [Select Records Officer]

⚪ Assign Agency Staff

Billable Rate: $ [0 ⬍] Per Hour

Price Waived: [Yes ⬍]

Paid: [No ⬍]

Date Due: [_____]

Description: [Max 4000 Characters]

Add Task

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Other: Tasks

Approve	Deny	Extraordinary Circumstances	Refer	Fees	Contact Requester	Other

Show Only Active Tasks

Search:

Title ▲	Assigned To ⬍	Status ⬍
Contact requester for clarification	Renee Wilson	In Progress
Research classification of records requested	Renee Wilson	In Progress

Add Task

Duplicate Previous Task:

Title: * Descriptive Title for Task

Assign Person:*

　　　　　　　　　● Assign a Records Officer

　　　　　　　　　* Renee Wilson　　　Select Records Officer

　　　　　　　　　○ Assign Agency Staff

Billable Rate: $ 0 ⬍ Per Hour

Price Waived: Yes ⬍

Paid: No ⬍

Date Due:

Description: Max 4000 Characters

Add Task

Approve	Deny	Extraordinary Circumstances	Refer	Fees	Contact Requester	Other

Show Only Active Tasks

Search: _____

Title ▲	Assigned To ⇕	Status ⇕
Contact requester for clarification	Renee Wilson	In Progress
Research classification of records requested	Renee Wilson	In Progress

Add Task

Title: * Research classification of records requeste

Assign Person:*

    ● Assign a Records Officer

     * Renee Wilson   **Change Records Officer**

    ○ Assign Agency Staff

Billable Time: 2   Hours

Billable Rate: Per Hour

Price Waived: No

Paid: No

Date Due: _____

Date Assigned: 01/07/2016 20:05 48

Date Changed: 01/07/2016 20:06 10

Last Changed By: Renee Wilson

Notes: Please explain the results of this task. Max 2000 characters

Description: Max 4000 Characters

Save   **Mark Complete**   **Cancel Task**

Other: Documents

Other: Notes

Other: Log

Request marked as received

Manage Request

Reports   My Profile   Dashboard   FAQ   About   Logout

⬅ Records Officer Dashboard
Records Requested

Title:	Open Records Portal Administrator's emails
Date Due:	09/21/2015
Total Fee for Request:	To be determined
Request Status:	In Progress
Description:	I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.
Restrictions:	Records contain no restricted information
Record Access:	Receive a copy and request a fee waiver. Approve/Deny
	Releasing the record primarliy benefits the public
	Please expedite this request because these records will benefit the general public. Approve/Deny
	More Detail

(Print Request) (Close Request) (Respond to Request Outside Portal)

Request Portions ❓

Title ▲	Status ⬍	Date Due ⬍
Main Request	Open	09/21/2015
Request Expedited	Open	09/21/2015
Request Fee Waiver	Open	09/21/2015

Title:	* Main Request
Status:	Open
Total Fee Quoted:	To be determined
Date Due:	09/21/2015
Assigned Records Officer:	* Kendra Yates (Change Records Officer)
	More Detail
Description:	* I want to see all of the open records portal's administrator's emails about user testing and how and when it was done and with whom.

(Divide Request into Parts) (Save)

Approve	Deny	Extraordinary Circumstances	Refer	Fees	Contact Requester	Other

Up and Coming

- In consideration or planning:
  - Customizable fields to capture information specific to your agency
  - Customizable fee schedules
  - Ability to collect fees
  - Additional reporting tools
  - Ability to manually enter requests received outside of the portal

Questions???

Please let us know if:

- You have special records request needs
  - Additional required forms
  - Already using an online request system
- You have questions or concerns
- You have requests or suggestions for new features
- You like it

ONLINE RECORDS: COMING SOON!

Up and Coming

- In consideration or planning:
  - View agency series information
  - Report new series; edit/revise series information
  - Upload local ordinances (or URL)
  - And much more!

RECORDS OFFICER DASHBOARD

Records Officer Certification

Records Requests   Online Records   Dashboard

GRAMA Requests	Training	Agency	Agency Records	My Account

← Training

Certification Information for Renee Wilson

✅ Your current status: **APPROVED**

Annual renewal due: DECEMBER 22, 2016

Applicable Tests

Test Name	Your Status	Resources	Actions
Records Access Essentials Test	See test results below.	View Test Materials	Start This Test
Records Management Essentials Test	Never taken.	View Test Materials	Start This Test

Your Test History

Test Name	Started	Completed	Score	Pass/Fail	Options
Records Access Essentials Test	12/22/2015	12/22/2015	100.00%	Pass	Reprint My Certificate
Records Access Essentials Test	12/22/2015	12/22/2015	89.80%	Pass	Reprint My Certificate
Records Access Essentials Test	12/18/2013	12/18/2013	98.00%	Pass	Reprint My Certificate
Records Access Essentials Test		12/18/2014	94.00%	Pass	Reprint My Certificate

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Records Officer Certification

Records Requests   Online Records   Dashboard

GRAMA Requests   Training   Agency   Agency Records   My Account

← Training

Certification Information for Renee Wilson

Your current status: **APPROVED**

Annual renewal due: DECEMBER 22, 2016

Applicable Tests

Test Name	Your Status	Resources	Actions
Records Access Essentials Test	See test results below.	View Test Materials	Start This Test
Records Management Essentials Test	Never taken.	View Test Materials	Start This Test

Your Test History

Test Name	Started	Completed	Score	Pass/Fail	Options
Records Access Essentials Test	12/22/2015	12/22/2015	100.00%	Pass	Reprint My Certificate
Records Access Essentials Test	12/22/2015	12/22/2015	89.80%	Pass	Reprint My Certificate
Records Access Essentials Test	12/18/2013	12/18/2013	98.00%	Pass	Reprint My Certificate
Records Access Essentials Test		12/18/2014	94.00%	Pass	Reprint My Certificate

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Records Officer Certification

Records Requests   Online Records   Dashboard

GRAMA Requests   **Training**   Agency   Agency Records   My Account

← Training

Certification Information for Renee Wilson

Your current status: APPROVED

Annual renewal due: DECEMBER 22, 2016

Applicable Tests

Test Name	Your Status	Resources	Actions
Records Access Essentials Test	See test results below.	View Test Materials	Start This Test
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Your Test History

Test Name	Started	Completed	Score	Pass/Fail	Options
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Records Officer Certification

Records Requests   Online Records   Dashboard

GRAMA Requests   Training   Agency   Agency Records   My Account

← Training

Certification Information for Renee Wilson

Your current status: **APPROVED**

Annual renewal due: DECEMBER 22, 2016

Applicable Tests

Test Name	Your Status	Resources	Actions
Records Access Essentials Test	See test results below.	View Test Materials	Start This Test
Records Management Essentials Test	Never taken.	View Test Materials	Start This Test

Your Test History

Test Name	Started	Completed	Score	Pass/Fail	Options
Records Access Essentials Test	12/22/2015	12/22/2015	100.00%	Pass	Reprint My Certificate
Records Access Essentials Test	12/22/2015	12/22/2015	89.80%	Pass	Reprint My Certificate
Records Access Essentials Test	12/18/2013	12/18/2013	98.00%	Pass	Reprint My Certificate
Records Access Essentials Test		12/18/2014	94.00%	Pass	Reprint My Certificate

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Records Officer Certification

Records Requests   Online Records   Dashboard

| GRAMA Requests | Training | Agency | Agency Records | My Account |

⟵ Training

Certification Information for Renee Wilson

✅ Your current status: **APPROVED**

Annual renewal due: DECEMBER 22, 2016

Applicable Tests

Test Name	Your Status	Resources	Actions
Records Access Essentials Test	See test results below.	View Test Materials	Start This Test
Records Management Essentials Test	Never taken.	View Test Materials	Start This Test

Your Test History

Test Name	Started	Completed	Score	Pass/Fail	Options
Records Access Essentials Test	12/22/2015	12/22/2015	100.00%	Pass	Reprint My Certificate
Records Access Essentials Test	12/22/2015	12/22/2015	89.80%	Pass	Reprint My Certificate
Records Access Essentials Test	12/18/2013	12/18/2013	98.00%	Pass	Reprint My Certificate
Records Access Essentials Test		12/18/2014	94.00%	Pass	Reprint My Certificate

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Records Officer Certification

Records Requests   Online Records   Dashboard

GRAMA Requests   Training   Agency   Agency Records   My Account

← Training

Certification Information for Renee Wilson

Your current status: **APPROVED**

Annual renewal due: **DECEMBER 22, 2016**

Applicable Tests

Test Name	Your Status	Resources	Actions
Records Access Essentials Test	See test results below.	View Test Materials	Start This Test
Records Management Essentials Test	Never taken.	View Test Materials	Start This Test

Your Test History

Test Name	Started	Completed	Score	Pass/Fail	Options
Records Access Essentials Test	12/22/2015	12/22/2015	100.00%	Pass	Reprint My Certificate
Records Access Essentials Test	12/22/2015	12/22/2015	89.80%	Pass	Reprint My Certificate
Records Access Essentials Test	12/18/2013	12/18/2013	98.00%	Pass	Reprint My Certificate
Records Access Essentials Test		12/18/2014	94.00%	Pass	Reprint My Certificate

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Register for Training

GRAMA Requests   Training   Agency   Agency Records   My Account

← Training

Upcoming Training Classes

Show 10 entries   Search:

Class Date	Location	Starts	Ends	Class Name	Status	Actions
Fri Jan 8, 2016	Utah State Archives	10:00 AM	12:00 PM	Open Records Portal Training	Available	Register for this Class
Tue Jan 12, 2016	Online Training	10:00 AM	12:00 PM	Open Records Portal Training	Available	Register for this Class
Tue Jan 19, 2016	Orem City Council Chambers	10:00 AM	12:00 PM	Open Records Portal Training	Available	Register for this Class
Wed Jan 20, 2016	Sevier School District	9:00 AM	12:00 PM	Records Access I: Public Records Requests	Available	Register for this Class
Wed Jan 20, 2016	Sevier School District	1:00 PM	4:00 PM	Basic Records Management I: Records Management	Available	Register for this Class
Wed Jan 27, 2016	Weber State Library Special Collections	10:00 AM	12:00 PM	Open Records Portal Training	Available	Register for this Class
Thu Jan 28, 2016	Online training	10:00 AM	12:00 PM	Open Records Portal Training	Available	Register for this Class
Wed Feb 17, 2016	Kane County Commission Chambers	9:00 AM	11:00 AM	Open Records Portal Training	Available	Register for this Class

Previous   1   2   Next

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Fri Jan 8, 2016	Utah State Archives	10:00 AM	12:00 PM	Open Records Portal Training	Available	Register for this Class
Tue Jan 12, 2016	Online Training	10:00 AM	12:00 PM	Open Records Portal Training	Available	Withdraw from this Class
Tue Jan 19, 2016	Orem City Council Chambers	10:00 AM	12:00 PM	Open Records Portal Training	Available	Register for this Class
Wed Jan 20, 2016	Sevier School District	9:00 AM	12:00 PM	Records Access I: Public Records Requests	Available	Register for this Class
Wed Jan 20, 2016	Sevier School District	1:00 PM	4:00 PM	Basic Records Management I: Records Management	Available	Register for this Class
Wed Jan 27, 2016	Weber State Library Special Collections	10:00 AM	12:00 PM	Open Records Portal Training	Available	Register for this Class
Thu Jan 28, 2016	Online training	10:00 AM	12:00 PM	Open Records Portal Training	Available	Register for this Class
Wed Feb 17, 2016	Kane County Commission Chambers	9:00 AM	11:00 AM	Open Records Portal Training	Available	Register for this Class

Previous   1   2   Next

My Profile

Records Requests   Online Records   **Dashboard**

GRAMA Requests   Training   Agency   Agency Records   My Account

⇐ My Account

| Name: | Prefix | Renee | Middle Name | * Wilson | Suffix |

Familiar Name (Nickname): Renee

Title: Open Records Portal Web Admin.

Email Address: reneewilson@utah.gov

Receive Notifications: Yes

Always Change All AROs: Ask

Phone Number: 801 531 - 3842   Ext: 9999

Fax: (999) 999 - 9999

Address: Address Line 1
346 South Rio Grande St.
AddressLine 3

City/State: Salt Lake City   UT

Zip Code: 84101 - 9999

Save

Up and Coming

- In consideration or planning:
  - Request training
  - Verify records officers (for CAOs)
  - Update agency information
  - Contact your Archives records analyst
  - And much more!

Questions???

Contact Us

- Website: openrecords.utah.gov
- Renée Wilson, Open Records Portal Administrator
  - Contact for questions about the portal, portal use, functionality, etc.
  - reneewilson@utah.gov
  - 801-531-3842

- Nova Dubovik, GRAMA Coordinator
  - Contact to report agency updates, GRAMA designee, etc.
  - ndubovik@utah.gov
  - 801-531-3834

- Rosemary Cundiff, Government Records Ombudsman
  - Contact with questions about GRAMA law, mediation, etc.
  - rcundiff@utah.gov
  - 801-531-3858

Analysts

Kendra Yates – 801-531-3866, kendrayates@utah.gov
- elected state agencies, courts, legislature; analyst manager

Rae Gifford – 801-531-3836, rgifford@utah.gov
- state agencies (with a few exceptions) and education

Lorianne Ouderkirk – 801-531-3860, louderkirk@utah.gov
- local agencies, law enforcement, Dept of Health

Rebekkah Shaw – 801-531-3851, rshaw@utah.gov
- general retention schedules

Transparency Board

- For large-scale or specific legislative concerns
- John Reidhead, chair
  - jreidhead@utah.gov
  - 801-538-3095
- Patricia Smith-Mansfield, vice chair
  - pmansfie@utah.gov
  - 801-531-3850

TRAINING & CERTIFICATION FOR RECORDS OFFICERS

Compliance made easy(ier) – an overview

Your Responsibilities as CAO Include:

- Establish records management program
- Appoint records officer(s)
- Ensure that they certify annually

Your Responsibilities as Records Officer may Include:

- Care and Maintenance

- Scheduling and Disposal

- Classification and Designation

- Providing access

- Preserving

Records officers may share those responsibilities with other records officers in their agencies, depending on how the roles are distributed.

Certifying annually

- Every records officer (almost)
- Utah Code 63G-2-108

Certification option available up to now

Online training course that "shall train a records officer regarding the provisions of [GRAMA]"

Utah Code 63A-12-110(3)

Division of Archives & Records Service
SERVICES ELEVATED

RECORDS ACCESS ESSENTIALS FOR GOVERNMENT EMPLOYEES

Home
Module 1: General Provisions
Module 2: Access to Records
Module 3: Classification
Module 4: Appeals
Module 5: Applicability to Political Subdivisions, the Judiciary, and the Legislature
Module 6: Other provisions in GRAMA
Download GRAMA law
Print this training

« Go to End | Go to Start »

This training will assist records officers in complying with GRAMA requirements when fulfilling records requests and teach them how to find and use the provisions of GRAMA. This training will cover those provisions of GRAMA needed to fulfill records requests.

It is recommended that records officers taking this training download a copy of GRAMA to follow along in the training and mark up important provisions.

The State Archives offers additional training covering other GRAMA provisions and on issues of records management. These training opportunities can be found on the State Archives website.

To begin, please select a module from the menu.

346 S. Rio Grande St • Salt Lake City, UT 84101
Telephone (801)531-3863 • Email recordsmanagement@utah.gov

There are now two paths to certification

- Records Access
  - GRAMA
  - Classifying records
  - Responding to GRAMA requests appropriately

- Records Management
  - PRMA
  - Understanding records
  - Implementing retention schedules

RECORDS ACCESS

GRAMA in a nutshell

GRAMA Certification

- Records Access
  - GRAMA
  - Classifying records
  - Respond to GRAMA requests appropriately

Division of Archives & Records Service
SERVICES ELEVATED

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GRAMA Sections

- Section 1: General Provisions

- Section 2: Access to Records

- Section 3: Classifications

- Section 4: Appeals

- Section 5: Applicability to Political Subdivisions, the Judiciary, and the Legislature

- Section 6: Other provisions in GRAMA

GRAMA Defined
Government Records Access and Management Act

- Passed in 1991-92

- Utah basic records law

- Guideline for disclosure and restrictions

- Classification structure for records

Section 1: General Provisions
GRAMA Legislative Intent

- Promote easy and reasonable access to public records

- Specify when interest in restriction outweighs access

- Define appropriate restrictions

Section 1: General Provisions

- Definitions

- Confidentiality agreements

- Records of security measures

- Certification of records officers

Section 2: Access to Records

Section 2: Access to Records

RIGHT TO INSPECT

- Right to inspect records and receive copies

- Government not required to create, compile, format records

- Government may not use physical form to hinder access

Section 2: Access to Records

DISCLOSURE OF RECORDS

- Private records to individual, parent or legal guardian, POA

- Controlled records to health care providers with authorization

- Protected records to the person who submitted, POA etc.

- Verify identity of requester

Section 2: Access to Records

- GRAMA request
  - Must have the following information:
    - Name
    - Mailing address
    - Telephone number (if available)
    - Description of record

Section 2: Access to Records

- Records officer has 10 Business days to respond

  - Approve

  - Deny

  - Notify governmental entity does not maintain record

  - Notify of extraordinary circumstances
    - (8 Extraordinary Circumstances)

Record used by another agency

- Agency in possession returns record **within 5 business days** (unless return impairs the holder's work)

Record used for an audit

- Notify Requester when record is available

Voluminous request or voluminous records requests filed within 5 working days of each other

- Estimate amount of time to finish the work. May treat a request for multiple records as separate requests and respond sequentially to each. **Reasonable time.**

Agency processing large number of requests

- Estimate amount of time to finish the work. May treat a request for multiple records as separate requests and respond sequentially to each. **Reasonable time.**

Review a large number of records

- Estimate amount of time to finish the work. May treat a request for multiple records as separate requests and respond sequentially to each. **Reasonable time.**

Involves legal counsel

- **5 day extension** permitted from the original request.

Extensive redacting/segregating

- **15 business days** to fulfill the request from date of the original request

Redacting/segregating information requires computer programing

- Disclose the requested records as **soon as reasonably possible**

Section 2: Access to Records

- Fees

- Denials

- Sharing records

- Subpoenas

Section 2: Access to Records

- Fees

- Denials

- Sharing records

- Subpoenas

Section 2: Access to Records

- Fees

- Denials

- Sharing records

- Subpoenas

SIMPLIFIED GRAMA PROCESS CHART

Approved
Records provided

GRAMA Request Received
10 business days to respond

- **DETERMINATION**
- Approve
- Access deny in whole or part
- Fee waiver denial
- Do not maintain
- Claim Extraordinary circumstances
- Failure to respond
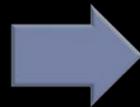
Notify Requester of the governmental entity's decision

- **DENIAL**

Notify Requester the right to appeal decision to chief administrative officer or designee

- Provide written response
- Description of portion denied
- Citation
- Right to Appeal
- **30 Calendar Days to file an appeal**
- Name/address of chief administrative officer or designee

Section 2: Access to Records

- Fees

- Denials

- Sharing records

- Subpoenas

Section 2: Access to Records

- Fees

- Denials

- Sharing records

- Subpoenas

Section 3: Classification

- Public

- Private

- Controlled

- Protected

Section 3: Classification

- Public Records
    - Open meeting minutes
    - Financial records
    - Initial contact reports
    - Government contracts
    - All records not specifically restricted

Section 3: Classification

Private Records

- Medical history
- Performance evaluations
- Library records that identify a patron
- Employee personal contact information
- Any clearly unwarranted invasion of personal privacy

Controlled Records

- Medical, psychiatric, or psychological data about individual
- Release detrimental to subject of record or to the safety of others
- Release violates medical ethics

Section 3: Classification

- Protected Records
- 65 protected records listed

  - Bids for contracts
  - Trade secrets
  - Test questions
  - Drafts
  - Attorney client privilege

  - Records release could interfere with government process such as audit, exam, investigation, or trial

Section 4: Appeals

Important provision

Right of requester or interested party to appeal the decision

Records officers should familiarize with past decisions

Go ahead and "appeal to a higher authority". But you know Mommy rarely overrules me.

Section 4: Appeals

- A requester has the right to appeal the governmental entity's decision

  - Chief administrative officer
  - Local appeals board (if established)
  - State records committee or district court

SIMPLIFIED GRAMA PROCESS CHART

Notice of Appeal Received by chief administrative officer or designee
5 business days to respond

- **Determination**
- Approve
- Access deny in whole or part
- Failure to respond

Approved
Records provided

Notify Requester of the governmental entity's decision

- **DENIAL**

Notify Requester the right to appeal decision

- Provide written response
- Right to Appeal
- **30 Calendar Days to file an appeal**
- Name/business address of:

- Ex. Sec. of State Records Committee or
- Designee of local appeals board if established

Appeal to District Court
30 Calendar Days

Appeal to State Records Committee
30 Calendar Days

Local Appeals Board
(If established Requester must first file appeal to the local appeals board, after which Requester may appeal to the State Records Committee or District Court)

Appeals Timeline

- Requester Submits GRAMA

- Governmental Entity
  - 10 business days to respond

- Notify Requester in writing right to appeal within 30 days

- Chief administrative officer or designee
  - 5 business days to respond

- Notify Requester in writing right to appeal within 30 days
  - Local appeals board
  - State records committee
  - District court

Section: 5 and 6

- Section 5: Applicable to political subdivisions, judiciary, and the legislature

- Section 6: Other provisions in GRAMA

QUESTIONS?

There are now two paths to certification

- Records Access
  - GRAMA
  - Classifying records
  - Responding to GRAMA requests appropriately

- Records Management
  - PRMA
  - Understanding records
  - Implementing retention schedules

RECORDS MANAGEMENT

Essential Principles and Practical Application

Section 1: Laws (PRMA and GRAMA)

- **Definitions**

- **Warnings**

- **Duties**

- Record or non-record?

- What is a record series?

- Which is the record copy?

- What does it mean to 'schedule' records?

- General retention schedule vs. Series-specific retention schedule

Records are property of the State

Do **not** intentionally

destroy

mutilate

damage

dispose of

Contrary to a properly adopted retention schedule

w a r n i n g s

- Governmental Entities
  - Chief Administrative Officers
  - Records officers
- Division of Archives and Records Service
  - Archives and Records management
  - Training and standards
  - Retention Schedules
  - Repository for historical records

Section 2: Principles of records management

Section 2: Principles of records management
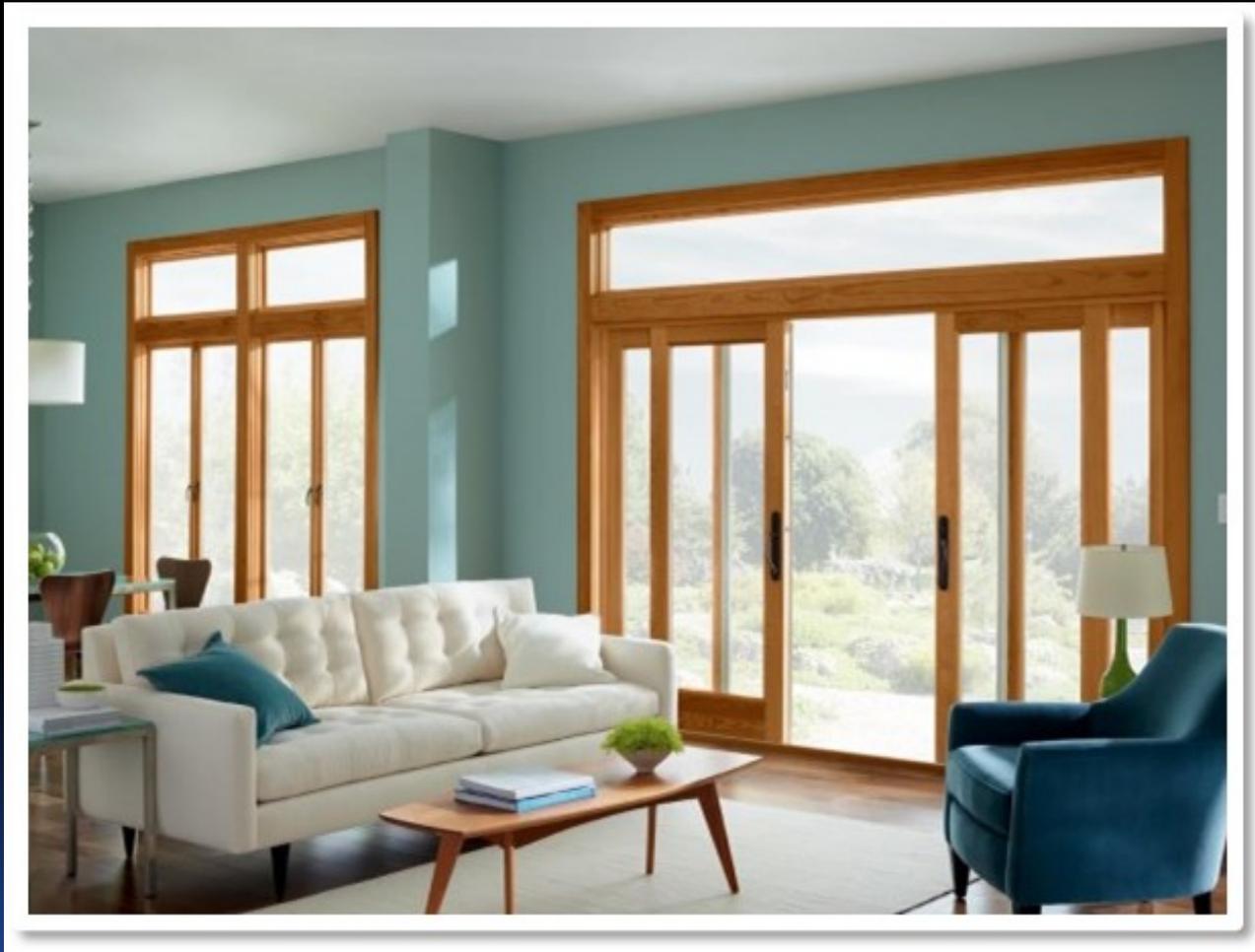
Section 3: Ten practical steps for implementing retention schedules

http://www.licc.org.uk/imagine-church/signposts/three-practical-steps/

1. Find your retention schedules
2. Understand your retention schedules
3. Inventory your records
4. Get staff feedback
5. Establish plans
6. Update your retention schedules
7. Assign and train staff members
8. Organize your records
9. Transfer records as necessary
10. Destroy records as necessary

Points of Pain

Questions

Gaps in understanding

http://www.leapfrogging.com/2013/06/20/painstorming-for-innovation/

Retention Schedule Types

General Retention Schedule

HOME / RECORDS MANAGEMENT / STATE GENERAL SCHEDULE

STATE AGENCY GENERAL RECORDS RETENTION SCHEDULE

Items listed in general retention schedules identify records which may or may not exist in any given agency. They are models to follow if a governmental entity's records closely proximate the descriptions. All records are governed by either the agency's own properly adopted retention schedule or general retention schedules (63G-2-604).

- Administrative Records (1)
- Budgeting Records (2)
- Cartographic Records (3)
- Communication Records (4)
- Data Processing Records (5)
- Facility Management Records (6)
- Financial Records (7)
- Human Resource Records (11)
- Motor Vehicle Maintenance and Operation Records (9)
- Payroll Records (10)
- ***Printing Records (12) OBSOLETE
- Property Records (14)
- Purchasing Records (13)
- Public Affairs Records (15)
- Security Services Records (16)
- Law Enforcement (17)

Series-specific Retention Schedule

Utah State Archives

AGENCY: Department of Administrative Services. Division of Administrative Rules

SERIES: 7192   4
TITLE: Administrative rules files
DATES: 1973-
ARRANGEMENT: Numerical by file number.
ANNUAL ACCUMULATION: 6.00 cubic feet.
DESCRIPTION:
These records support the agency's function to record the receipt of all rules submitted by state governmental agencies authorized or required by law to make rules (Utah Code 63G-3-402(1)(b)(2010) & 63G-3-102(2)(2008)). These records document the changes in administrative law governing the state as well as the final published version. These records are the official copies of the administrative rule filings submitted in accordance with the Utah Administrative Rulemaking Act, Title 63G. Records may also include materials incorporated by reference, notice of effective date, and pertinent correspondence.

RETENTION:
Retain 2 years.

DISPOSITION:
Transfer to the State Archives with authority to weed.

RETENTION AND DISPOSITION AUTHORIZATION:
Retention and disposition for this series were specifically approved by the State Records Committee.

APPROVED: 09/1989

FORMAT MANAGEMENT:
The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 2 years and then transfer to State Archives.

Microfilm master: Retain in State Archives permanently.

Microfilm duplicate: Retain in Office permanently.

Which is the record copy?

- Your agency:
  - Chooses
  - Commits
  - Manages
  - Preserves
  - Disposes

Electronic records are records, too
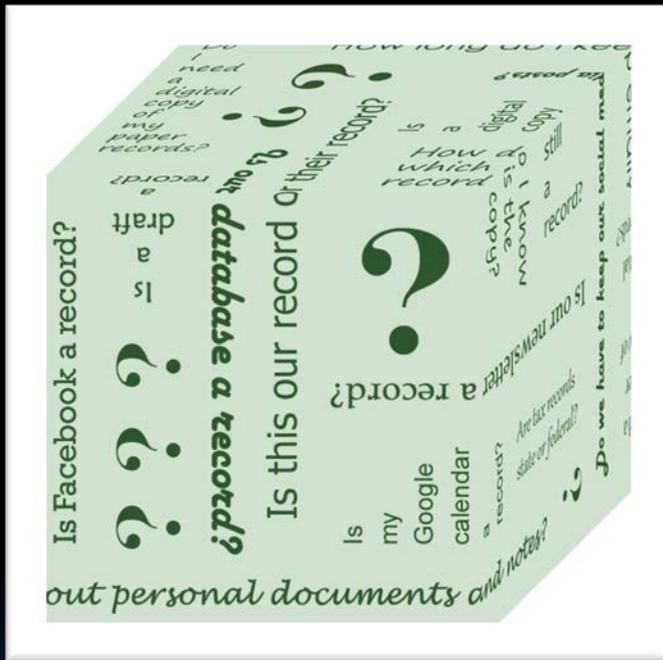
- Social media

- E-mail and IMs

- Information in Database systems

Your database is full of records…

It is your job to know what they are.

https://www.pinterest.com/uolga/cenjoy-your~tea-timec/

https://threatpost.com/slack-discloses-breach-of-its-user-profile-database-implements-2fa/111872/

Managing electronic records

- Establish plans for:
  - Reformatting
  - Data migration
  - Data storage

Step 9: Transfer records as necessary

State Records Center in Clearfield

- Inactive records
- FREE off-site storage
- Custody held by government agency
- Agency may request records

Utah State Archives

Utah State Archives in Salt Lake City

- Repository for historical records
- Custody held by state archives
- Access via the Research Center or online

Step 10: Destroy records as necessary

- If disposition is: destroy

- Retentions are not just a minimum

- All copies of a record should be destroyed at the same time as the record copy (if not done sooner)—regardless of format

WHAT CAN WE DO TO MAKE YOUR JOB EASIER?

We would love your feedback!

Records Analysts

Kendra Yates – 801-531-3866, kendrayates@utah.gov
- elected state agencies, courts, legislature; analyst manager

Rae Gifford – 801-531-3836, rgifford@utah.gov
- state agencies (with a few exceptions) and education

Lorianne Ouderkirk – 801-531-3860, louderkirk@utah.gov
- local agencies, law enforcement, Dept of Health

Rebekkah Shaw – 801-531-3851, rshaw@utah.gov
- general retention schedules

GRAMA Specialists

Website: openrecords.utah.gov

Renée Wilson – 801-531-3842, reneewilson@utah.gov

- Open Records Portal Administrator
- Contact for questions about the portal, portal use, functionality, etc.

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