TIP SHEET FOR UIPA LOG USERS (June 2016)

Helpful tips for completing the UIPA Record Request Log, based on users' experiences.

USING THE LOG (basic tips):

1. **Follow the training guides closely.**
   Don't skip steps. Keep the Checklist handy. You might also want to print out the Tip Sheet, Process Chart (formerly "Cheat Sheet"), or the transcript from the UIPA Record Request Log power point (June 2016), which are found on OIP's Log training page.

2. **To view the UIPA Log, use Excel "View" to zoom in and out.**
   To adjust your view of the Log spreadsheet, change the zoom view to about 65% (click on View, then Zoom, and select a zoom level). This allows you to see the white data entry rows at the bottom. To view any part of the Log more closely, zoom in. For example, select 100% to zoom in on the pop-up instructions or the list of departments and agencies in the drop-down menus for columns A and B. If you need to print the spreadsheet, try using "print view" and then print only the pages that have column headings and data. For your convenience, OIP's training page contains a PDF version of the Log that is preformatted to be printed on legal sized paper (8.5 x 14 inches).

3. **Use the pop-up instructions on the UIPA Log.**
   Just mouse over a column heading to see the pop-up instructions.

4. **Learn from the four Examples on the Sample UIPA Request Log.**
   The four examples (the highlighted rows above the "Totals" row) illustrate how to report different requests, like a typical request, a personal record request, and a complex request. **The Sample Log is for practice only.** DO NOT use the Sample Log as your agency's Log because it does not contain all columns.

5. **To expand the agency drop-down list on the UIPA Log:**
   Place the cursor on the vertical line between Col. B and Col. C in the very top row, then click and drag to the right. (After selecting the agency from the drop-down list, you can click and drag the line back to narrow the column.)

USING THE LOG (DOs and DON'Ts):

1. **Use the correct Log form:** DO use the FY 2017 Log form on the OIP's training page (http://oip.hawaii.gov/laws-rules-opinions/uipa/uipa-record-request-log/). **DO NOT use the Sample Log**.

2. **Where to enter data:** DO enter data in the white cells only. DO NOT enter data in any colored cells. Colored cells are for the Log's automatic calculations. Other than the white cells, the UIPA Record Request Log form is locked. DO NOT attempt to change column headings and formulas.

3. **Requester name:** DO enter the Requester's name, initials, or file number in Col. D, preceded by an asterisk * if the request is being made on behalf of a for profit or nonprofit entity. DO NOT enter the Requester's full name if it is a personal record request; use the personal record Requester's initials or file number instead.

4. **<u>Date agency received request</u>** (Col. G): DO enter the one date received, by month/day/year (e.g., 7/1/16). DO NOT enter any requests received outside the reporting period. For example, a request received 6/30/16 should be reported on the agency's FY 2016 Log, but a report received 7/1/16 should be reported on the agency's FY 2017 log. The log uses this column to total the number of requests received.

5. **<u>Fee Waivers</u>** (Col. AB and AC): Beginning in FY 2017, **the Log will automatically enter a $30 fee waiver** in Column AB when appropriate, which is why Column AB is highlighted in blue and the agency should not enter anything in it. **But if the agency enters any SRS hours and grants a $60 public interest fee waiver, then the agency should enter <u>one</u> "x" in the white cell of column AC.** No "x" should be entered in a purple-colored cell, which indicates a personal record request for which no fees are chargeable so no fee waiver is granted.

6. **<u>Outcomes</u>** (final resolution of requests; Col. O thru Col. T): **Each request has only one final outcome.** DO enter <u>one</u> "x" in the appropriate column of O through T. DO NOT enter an "x" in more than one of these columns. If the agency is ultimately unable to respond to the request (Col. R; read the pop-up instructions), that is the one final outcome. If the requester withdrew (Col. S), or if the requester abandoned or failed to pay (Col. T), that is the one final outcome.

7. **<u>Date Completed</u>** (Col. M): Carefully follow the Log <u>Instructions</u> for Col. M to determine the completion date ("Instructions" June 2016, pages 10-11).

8. **<u>Search, Review and Segregation Hours</u>** (Col. V, W, X): DO enter the hours in **<u>15-minute increments</u>** only (**.25** = 15 minutes; **.50** = 30 minutes; **.75** = 45 minutes; **1.0** = 1 hour). If the hours do not end in .25, .50, .75, or .00, or if you've used a comma instead of a period for the decimal point, then the data is entered incorrectly.

9. **<u>Copy/Delivery Costs</u> (**Col. AF and AG). If there are copy/delivery costs for a request, DO enter amounts in <u>both columns</u> (GROSS Copy/Delivery Costs INCURRED and NET Copy/Delivery Costs CHARGEABLE). DO NOT enter costs in only one column. Net costs can be equal to but not higher than gross costs.

RESPONDING TO REQUESTS FOR LOG COPIES:

1. **Name of Requester (Col. D):** Follow the guidance in the Log <u>Instructions</u> and <u>OIP Op. Ltr. No. 90-37</u>. Requesters' names are generally not redacted for <u>government</u> record requests. If you have used full names instead of initials or file numbers for <u>personal</u> record requests, however, you can redact the requester's name by replacing it with "xxxxxxxxxx." If the requester does not want the requester names, however, the agency can delete all of the requester names in Column D.

2. **Producing the Log as an Excel spreadsheet:** In response to a request, the agency should respond with the Log as a pdf to ensure that no changes are made, unless the requester asks for the Log as an Excel spreadsheet. If the agency wants to first remove any hidden data or personal information or notes that may be stored in the Excel spreadsheet, follow the Microsoft support instructions: "<u>Remove hidden data and personal information by inspecting workbooks</u>."