TIP SHEET FOR UIPA LOG USERS (March 2015)

Helpful tips, based on users' experiences, for (1) completing the UIPA Record Request Log, (2) uploading agency Log totals to the Master Log at data.hawaii.gov, and (3) responding to requests for Log copies.

USING THE LOG (basic tips):

1. **Follow the training guides closely.**
   Don't skip steps. To have a handy reference guide by your keyboard, print the two training guides that are marked with *** on the OIP's training page:
   *** UIPA Record Request Log TRAINING with NOTES (12jun14) (pdf)
   *** How to Upload UIPA Log to DHG effective 1.1.2014 with NOTES (pdf)

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. The spreadsheet can be printed on larger paper, too.

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.

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 form on the OIP's training page (http://oip.hawaii.gov/laws-rules-opinions/uipa/uipa-record-request-log/), currently UIPA Record Request Log FORM FY 2015 (Excel). DO NOT use the Sample Log.

2. **Where to enter data:** DO enter data in the white cells only. DO NOT enter data in 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. **<u>Date agency received request</u>** (Col. G): DO enter the one date received, by month/day/year (e.g., 7/1/14). DO NOT enter any requests received outside the reporting period. For example, a request received 6/30/14 should be reported on the agency's FY 2014 log, but a report received 7/1/14 should be reported on the agency's FY 2015 log. The log uses this column to total the number of requests received.

4. **<u>Fee Waivers</u>** (Col. AB and AC): DO enter a $30 fee waiver (normal waiver) OR a $60 fee waiver (if request meets the public interest requirements) for <u>each request</u>, unless the request is a personal record request. Fee waivers are an important part of the record request process and statistics.

5. **<u>Outcomes</u>** (final resolution of requests; Col. O thru Col. T): Each request has only one final outcome. DO enter an "x" in the appropriate column. 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.

6. **<u>Date Completed</u>** (Col. M): DO carefully follow the Log <u>Instructions</u> for Col. M to determine the completion date ("Instructions" July 2014, page 8). Completion dates are vital and must be entered, unless the response is still ongoing.

7. **<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). DO NOT use any other way of showing time.

8. **<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> (See Log <u>Instructions</u> for difference between GROSS Copy/Delivery Costs INCURRED and NET Copy/Delivery Costs CHARGEABLE). DO NOT enter costs in only one column.

UPLOADING AGENCY TOTALS TO THE MASTER LOG (at data.hawaii.gov):

1. **<u>Request PUBLISHER rights when you request a login from ICSD</u>**. You will need publisher rights to append your agency totals to the Master Log and publish.

2. **<u>Make sure you are in the correct Master Log</u>.** Select the appropriate fiscal year and semiannual or year-end.

3. **<u>Follow the training guides closely</u>. After you sign in to data.hawaii.gov to upload your Log totals, be sure to <u>click on "Home" at the top of the page</u>.**
   After that, you can use the search box at the top to search for the Master Log dataset. If you use the keyword "UIPA" in the search box, this will bring up the Master Log. Add your totals to the OIP Master Log (**not** to the "more views" list of individual department logs, like "HEALTH").

4. **When uploading your Log totals to data.hawaii.gov, select "APPEND." DO NOT SELECT "REPLACE."**
   You are adding your totals to the Master Log on data.hawaii.gov. If you select "Replace," you will replace all the existing data from other agencies.

5. **To view just one department's agencies and totals, select the OIP Master Log, then click on the purple "More Views" button.**
   This feature filters out all other agencies, so you can see each agency within your department, and also the department totals.

6. **If you have questions, or need to correct your data on data.hawaii.gov, contact Michael Little at OIP: 586-1400 or oip@hawaii.gov.**
   OIP can correct the data in a single cell (such as number of routine requests) or cells.

RESPONDING TO REQUESTS FOR LOG COPIES:

1. **Name of Requester (Col. D):** Follow the guidance in the Log Instructions ("Instructions" July 2014, page 5): "… if the Log itself must be produced in response to a records request, the requester's name is generally not considered confidential information and should not be redacted, except possibly for personal records requesters' names. See OIP Op. Ltr. No. 90- 37, or contact OIP for guidance regarding redactions."

   To redact a personal record requester's name, replace the name with "xxxxxxxxxx." If the person requesting the Log does not want the requester names, however, the agency can simply delete all of the requester names in the column.

2. **Producing the Log as an Excel spreadsheet:** In response to a request, the agency should respond with the Log as an Excel spreadsheet, unless the requester asks for the Log as a pdf.

3. **Removing hidden data or notes:** If the agency wants to first remove any hidden data or personal information or notes that may be stored in the Excel spreadsheet, refer to the Microsoft support instructions in the following article: "Remove hidden data and personal information by inspecting workbooks."