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Description of document:	Department of Education (ED) Freedom of Information Act (FOIA) Standard Operating Procedures (SOP) 2016/2021
Requested date:	22-May-2022
Release date:	01-December-2022
Posted date:	06-May-2024
Source of document:	FOIA Request U.S. Department of Education Office of the Executive Secretariat FOIA Service Center 400 Maryland Avenue, SW, LBJ 7W106A Washington, DC 20202-4536 ATTN: FOIA Public Liaison Fax: (202) 401-0920 Freedom of Information Act Public Access Link

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UNITED STATES DEPARTMENT OF EDUCATION

OFFICE OF THE SECRETARY

FOIA Service Center

December 1, 2022

RE: FOIA Request No. 22-02805-F

This letter is a final response to your request for information pursuant to the Freedom of Information Act (FOIA), 5 U.S.C. § 552, dated May 22, 2022, and received in the FOIA Service Center (FSC) on May 23, 2022. Your request was assigned to FSC to search for documents that may be responsive to your request.

You requested the following: A copy of each (internal) FOIA Standard Operating Procedure (SOP) at the Education Department FOIA Office. Please apply the foreseeable harm test, and discretionary release of what might otherwise be considered records exempt under b(5), and the presumption of openness.

Attached to this e-mail are 51 pages of documents responsive to your request. The documents provided are:

- SOP FOIA Daily_Weekly Report
- SOP for Processing FOIA in FOIAXpress FSC_Intake 10.7

However, certain information has been withheld according to FOIA exemptions (b)(5) and (b)(6), specified below:

- Records or portions of records relating to certain intra-agency information is exempt from disclosure pursuant to 5 U.S.C. § 552(b)(5), which concerns certain inter- and intra-agency communications protected by the deliberative process privilege.
- Records or portions of records relating to personal information is exempt pursuant to 5 U.S.C. §552 (b)(6) of the FOIA. Disclosure of this information would constitute a clearly unwarranted invasion of personal privacy.

Provisions of the FOIA allow us to recover the costs pertaining to your request. The Department has concluded that you fall within the category of Other. However, the Department has provided you with this information at no charge. The Department's release of this information at no cost does not constitute the grant of a fee waiver and does not infer or imply that you will be granted a fee waiver for future requests made under FOIA to the Department. Because we were able to locate and process these documents at minimal costs, they are provided to you at no cost.

Page 2 FOIA Request No. 22-02805-F

You have the right to seek assistance and/or dispute resolution services from the Department's FOIA Public Liaison or the Office of Government Information Services (OGIS). The FOIA Public Liaison is responsible, among other duties, for assisting in the resolution of FOIA disputes. OGIS, which is outside the Department of Education, offers mediation services to resolve disputes between FOIA requesters and Federal agencies as a non-exclusive alternative to appeals or litigation. They can be contacted by:

Mail	FOIA Public Liaison Office of the Secretary U.S. Department of Education 400 Maryland Ave., SW, LBJ 7C132 Washington, DC 20202-4500	Office of Government Information Services National Archives and Records Administration 8601 Adelphi Road Room 2510 College Park, MD 20740-6001
E-mail	robert.wehausen@ed.gov	OGIS@nara.gov
Phone	202-205-0733	301-837-1996; toll free at 1-877-684-6448
Fax	202-401-0920	301-837-0348

You have the right to appeal this decision by writing to the address below, 90 calendar days from the date of this letter. Using the services described above does not affect your right or the deadline to file an appeal. Your appeal must be in writing and must include detailed statement of all legal and factual bases for the appeal; it should be accompanied by this letter, a copy of your initial letter of request, and any documentation that serves as evidence or supports the argument you wish the Department to consider in making an administrative determination on your appeal.

Appeals may be submitted using the on-line form available at www.ed.gov/policy/gen/leg/foia/foia-appeal-form.pdf.

- E-mail: EDFOIAappeals@ed.gov
- Fax: 202-401-0920
 Mail: Appeals Office Office of the Secretary U.S. Department of Education 400 Maryland Avenue, SW, LBJ 7W106A Washington, DC 20202-4536

Sincerely, Elise Cook Elise Cook Government Information Specialist Office of the Secretary



STANDARD OPERATING PROCEDURES FOR PROCESSING FOIAS IN FOIAXPRESS – FOIA SERVICE CENTER

Version 10.7

U.S. Department of Education Office of the Executive Secretariat FOIA Service Center

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1. Creating a Request

From the Home screen, select the Requests tabs dropdown menu. Then select Create Request.

ne Requesters -	Requests	Document Manageme	ent - Administration	Reports	Request #	
fome	Search Request	Dashboa	rd Last Updated on 4/5/2021 10:26:5	AM C	Dashboards User Dashboard	
Assignments by Status	Create Appeal		Assignments by Mu	ltí Track Type	My Work Summary	
	ended 2			Complex	Primary Assignments	30
Antended					Secondary Assignments	30
Disposition Acc	cepted				Pending Requests for Documents	27
					Pending Consultations	1
Documents .	Added 7				Pending Expedite Determination	1
					My Jobs (0 Pending 2 Failed)	
Documents Added to Revie	w Log 9					
Documents Del	ivered 8			1	-	
			33		Messages Task Reminders Due/Overdue	0

To search for a requestor or enter a new requester, select the three dots next to **Requester** in the **Requester Details** section.

me Re	equesters - Requests	- Document Management -	Administration	Reports	Request #			_
ime ke	equesters • Requests	- Document Management -	Administration	Reports	Mediatest ac-			_
Home >>	Create Request					Note: *	fields are n	nandato
Create Rec	quest							
						Spell Check	Refresh	Save
Requester	Details							
	Requester* :			Organization :				
	Category*: Sele	E.		On Behalf Of :		(the state		

Search Requester	rs Create Requester				
eate Requester			-		
Personal Informa	tion	Contact Informa	tion		
Prefix		Home Phone:			_
First Name*	New	Work Phone1:	[
Middle Name:		Work Phone2:			
Last Name*	Request	Mobile:			
Suffix:	-	Fax:			
Job Title:		Email:			
General Informat	tion				
Organization:		Category*:	Private Individual	1	
Address					
Address 1	400 Maryland Ave SW	Country*:	United States		
Address 2:	And Maryland MAE 144	State	DC	-	
City:	Washington	ZIP Code:	20002		
city.	Luganigua		[12345 or 12345-6789 for	mat for US]	

Enter requestor details, address details, request details, request descriptions, fee details and comments (if necessary or required). Use the "+" and "-" signs to expand or contract each section. Please note that all * fields are mandatory.

Use the **Drag and Drop Zone** under the **Description** section to scan and attach request files. If an expedite and/or fee waiver are requested, the **Drag and Drop Zone** will be available for scanning and attaching documents once the **Yes** bubble is selected.

Restricted Nate Range for Record Search: From To	Drag and Drop Zone Incoming Request Letter(s): Scan File Attach File
lotes: Only Incoming Request Letters are Searchable Attachments	

After entering all information and documents for the request, select **Save**. Continue to the next step to assign the request.

2. Assigning Primary Users

Once you have created the request and selected **Save** on the previous screen, review your information and then use the green **NEXT** button to perform the next action.

Requesters - Reque	sts • Document Management	 Administration 	Reports	Request #	-	Q
1e >> Requests View (Primary A	ssignments] >> 21-00006-TRN - Request					Note: * fields are mandatory
aining - Request: 21-00006-Ti	RN Remaining Days	20	Status:	Received		CTION
quest Information						Spell Check Save
ssign Users	Requester Details					
	Requester*	Request, New 🏼 🏜		Organization :		
orrespondence	Category* :	Private Individual		On Behalf Of :		-
es/Billing	+ Address Details					
nal Actions	+ Other Address Details					
op the Clock	Request Details					
	Action Office* :	Exec Sec				
otes (0)	Request Type* :	Treining	-	Primary Assigned" :	Middleton, Desha	wn .
sk Reminders (0/0)	Received Mode =	E-mail		Priority :	N/AH	*
	Multi-Track Type :	Complex	.*	Delivery Mode :	PAL Download	
ctensions (0/0)	Requested Date* :	4/5/2021		Method of Payment :	Select Method of Po	ymesit 🝷
ipeals (0)	Received Date" :	4/5/2021		Original Received Date" :	4/5/2021	
gs/Reports	Target Date :	5/3/2021		Original Target Date :	5/3/2021	
	Estimated Date of Completion :	5/3/2021				
ore Actions	Extensions	-		Perfected :	Yes	
	Review Status :		1			
	Description*					
	Restricted Modify Des	cription Show Description H	istory (1)		- D	ag and Drop Zone
	Date Range for Record Search: I	Fram To			1	
	FOIA Documents				Incor	ning Request Letter(s): Scan File
						Attach File

Select Assign Request from the Select Action dropdown menu then select Perform Action.

Requesters - Requests -	Perform Next Action - 21-0	10006-TRN	×	Request #	
me >> 21-00056-1109 Request	Current status of this req	uest is <u>Received</u>			Note: Tields are mandatory
raining Request: 21 00006-764	Select Action :				NEXT)
		Assign Request Send/Receive Correspondence	Close		
quest Information		Final Actions			Smell Crach Seve
Re		Cast Sheet Billing		-	
nrespondence		Payments		on:	
		Create an Appeal Change Action Office		сла —	
ou/Billing		Stop the Clock		-	
sal Actions					
op 11+ Clock					

Click on the ellipsis next to the current primary user's name. Select the name of the user you wish to assign the request to and click **Select**.

tome >> 21-00005-TRN - Reque	st					Note: 1 fi	elds are manda
Training - Request: 21-00006-	FRN 📅 Remaining Da	ys: 20	s	itatus: Received			N
Request Information	Primary User				1		
Assign Users	Current Primary User of t	his Request is Mi	ddleton. Deshawn		¥		
Correspondence	Change the Primary I	User for the reques	it to* : Middleton,	Deshawn	Send Email No	tification	
Fees/Billing	Secondary Users				Add Users	Add Groups Add	Group Queues
Final Actions	Name	Туре	Group Name	Office	Email	Sand Empil	Action
Stop the Clock	Middleton, Deshawn	User	Exec Sec	Dept. of Education	Deshawn.Middleton@e		
Notes (0)	Assignment Note: (will be	included in assig	nment email notif	ication)			Spell Check
Task Reminders (0/0)							
Extensions (0/0)							
	the second se			he assignees			(2000)

Home Requestors -		Document Ma	inigament -	Administra	ation Repo		Galant 4		A.
	Search User								the These are morables.
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Television of the local division of the loca	Personal Infor	mation			User Informati	on			(111)
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Reilow Users	Last Name	1. C			Action Office	Bunc Sec			
	Email	1			Group	-			
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		9						Select	I and the
Name	Users								
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	Lines	21110	1000	chic ser		raddea in	111112-2004		
Wood in Galaxy									

After selecting a user select **Assign**. Click **Yes** to save your assignment selection. You should then receive a notification that says "The Request has been successfully assigned". Then select **OK**.

3. Requesting Documents

Now that the request has been assigned, select the green **NEXT** button. Select **Request for Documents** as your next action and click **Perform Action**.

Home >> Requests New Primary Assignme	(iii) >>	21.00006-TRN Request			Note: * ī
	-	Perform Next Action - 21-00	006-TRN	•	
Training - Request: 21-00016-TRN		Current status of this requ			
Request Information	Prim	Select Action :	Request for Documents	-	
Assign Users	Curr	7	Perform	Action Close	
Set Perfect Status			ſ		iend Email Notification
Correspondence	Seco				Add Usera Add Groups Add
Request for Documents (0/0)	Nat				Trans Board
Add/Search/View Documents (0/0)	Mhid				Aidaletön@e
Fees/Billing	Assig				
Final Actions					
Deliver Documents					

3.1 New Request for Documents - Step 1

Select New and then Add Program Offices.

raining - Request: 21-0000	6-TRN	Remaining Days: 20		Status: Assigned		N
equest Information	Request f	or Documents				
ssign Users	Action ID	Location(s) Referred	Request Date	Sent Date Due D	te Completed Date	Status
	There are n	Request for Document records.				
et Perfect Status	16 K	Page size: 20	9			0 dems in 1 pages
orrespondence			New Take Action	View Delete Ser	d Email/Reminder Send R	eminder by Print Action(s) Log
			1			
enfoits			-			
ear Alequient for Dockers into 2000 p. f			Han Request t	tor Documents - Step 2 -		
quest for Documents Informatio						
Request Date * 1	\$/5/2021					
Comments 1						
						Spell Check
	ote: If including an Empty ADX F in internal purposes only.	ile with the Request for Documents	the Comments entered will be in	included in the file for the reci	ilents review otherwise the comm	ient is kept
Due Date *	/5/2021 Add Reminde	r				
Priotity						K
end To : Program Offices						Add Program Officer
Action Office Program	n Office	ontact Name	Phone Co	entact Address	Email	Has 837 Activ
here are no offices salected.						
spatch Mode*						
a state the state	we to Disk	Delive	ry Mode E-mail			Dispatch Date : 1/6/2020

Check the program offices' box and then click **Select**. If applicable, choose the dispatch mode and/or to send the email to other recipients. Then click **Next**.

Search Program Office/Co	nsultancy					
Search Criteria					Wild card searches (*) are supporte
Basic Information						
Program Of	fice : -	Action Office		Exec Sec		
Ac	tive 🗧 🔘 All 🔘 No 💩 Yes		Category	Program Office Const	ultancy Location 🔘 Bo	oth
1					Edit Search	Clear Clos
Name Name	Contact Name	Phone Number	Has RX	Action Office	Category	
🖉 imies	Managan EDFCIA		1/s-	Tree Sec	(Bent)	
K K 1 > X Page sid	ze 20 •					t items in 1 mag
						Select
ote: Click on hyperlink to vie	whether a second setting					

3.2 New Request for Documents - Step 2

Complete step 2 by adding forms/attachments, updating email options and entering comments. Then select **Email** at the bottom of the page. Click **Ok** and then **Close Window**.

A Staguett Mugament, desk		Samplant Samplant Samplantas Lagy	5an ठाटा पर 2014क	Dente 27 3	Add From Manue Terranae Program Share-10/
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FQA Securit Augument item 1994 Securit Annual					Manua Tareguan
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From Email Type" L Gitter Fr	mail 🖷 User Action Office Email 🖂 Other Email				
Fromi ⁴ etilosam	anagentietigen				
Template : German					
Subject ⁴ L POM Re	quest Amagiment - 21-0006-TRM				
💮 Raad	Renarigit 🔝 Desivery Receipt 🔝 Instatals Empty ADX File				
To* L othiam	unager Bird gory obort with a mit of dig its affine and g				
Ce.					
Bett.)					
tiche Email artsinesses should be separated to	y a vemicalan î				
garden fan hender af an der in					

In the space provided for the "Email Body", input the <u>Fee Category</u>, <u>Willing to Pay</u>, <u>Multi track type</u> and the <u>FPL</u>'s name. Beside each, indicate the specified information from the Worksheet. Also, indicate if fee waiver or expedited processing or both was requested. This should be typed in bold red font which is usually copied from the "Intake Cut & Past" cheat sheet.

*Please note if the request is a Consultation from other agencies and they provide a deadline we must notify the assigned Program Office of that deadline when sending out the RFD. The original email from the agency as well as all supporting documentation must be uploaded to the correspondence log and sent with the RFD. Example:

NOTE: THIS IS A CONSULTATION FROM DOJ. DOJ IS REQUESTING TO COMPLETE YOUR REVIEW OF RECORDS BY MAY 31, 2020.

4. Adding Documents to the Review Log

There are three different ways to add documents to the review log. The status of your request should now read "*Request for Docs Sent*". Select **NEXT** and choose **Add/Search Documents** from the dropdown menu. Then click **Perform Action**.

FOIA Xpres:	Department of Education			Middleton, Deshawn 🍸 Help 🌋 Sign
ome Requesters - Requests -	Document Management - Adm	inistration Reports	Request #	- 0
Home >> Requests View [Quick Search Key	word::21-00006-trn] >> 21-00006-TRN - Request			
Training - Request: 21-00006-TRN	Remaining Days: 20	Status: Request for Docs S	ent 🔶	NEX
Request Information	Request for Documents			
Assign Users	Action ID Location(s) Referred	Request Date Sent Date	Due Date Completed Dat	te Status
Set Perfect Status	T2435 Excelled and annumber of edigav	nob. 04/06/2021 04/05/20/1	105/03/2021	Request for Documents Sent
	K K 1 M Page size: 20 ·			1 items in 1 pages
Correspondence		New Take Action View Dele	e Send Email/Reminder S	Send Reminder by Print Action(s) Log
Request for Documents (0/1)				

Training - Request: 21-00006-TRN		erform Next Action - 21-00006-TRN		x	
Request Information	Cur	rent status of this request is <u>Request for I</u> Select Action : Add/Search Document			
Assign Users	Requ		Perform Action	Close	ation
iet Perfect Status			1		If Of .
ion espondence	+ Add				
lequest for Documents (0/1)	+ Othe				
Ndd/Search/View Documents (0/0)	Requi				-
ees/Billing					gned" ;
inal Actions					riority :
Seliver Documents					Mode :

4.1 Add Documents

To add new documents, select the Add Documents tab.

Request Information	Review Log Docum	nents				
Assign Users	Add Documents	Add Documents From DM	Add From Correspondence Log	Refresh		
· · · ·	File Cabinet	GUID	Document Creat	ted Date Date Added	Sections Pages P	Redacted? Recent Layer Modified By
Set Perfect Status	There are no review to	gs to display				
Correspondence	K < 1 > H	Page size: 20 •				0 items in 1 pages
Request for Documents (0/1)	Open Documents	Open 40 Documents				
	Note: To remove de	noumants from the Revie	w Log you must select and Oper	n the document(s) in	Document Manage	amont
Add/Search/View Documents (0/0)	Note: To remove un	ocuments nom me nevie	w rog you must select and oper	in the document(s) if	i Document wianage	enieni.
Add/Search/View Documents (0/0) Fees/Billing	Request Folder Do		w tog you must select and oper	in the document(s) if	r Document wange	entent.
			Add From Correspondence Log	Refresh	i Document wanage	entent.
Fees/Billing	Request Folder Do	cuments 🔍	T.			Pages Redacted? Delivery Status
Fees/Billing Final Actions Deflver Documents	Request Folder Do	cuments Add Documents From DM GUID	Add From Correspondence Log	Refresh		
Fees/Billing Final Actions Deflver Documents	Request Folder Do Add Documents	Add Documents From DM GUID Olders to display	Add From Correspondence Log	Refresh		Pages Redacted? Delivery Status
Fees/Billing Final Actions	Request Folder Do Add Documents File Cabinet There are no request fi	Add Documents From DM GUID Olders to display	Add From Correspondence Log	Refresh		

Select the **File Cabinet Drawer** and use the **Drag and Drop Zone** to scan/attach documents. Then select **Add**.

Document Management Options			
File Cabinet Drawer" : Final Vier 2001 Second - Documents (1237)			
Option for Adding Pages	Document Format (Image/Native)		
Add each file as a separate folder Add all files to a single folder :	Add pages in Image Format (Redaction Enabled) Add files in Native format (Redaction Disabled)		
Add files directly to the folder	Other Option		
Add each file as a separate section under the folder	Create Folder to Manually Create Sections and Add Files.		
Add Documenta	second		
Add to the Review Log Request #21-00006-TRN	Open in Document Management upon Job Completion		
Use one of the methods below to upload a file, then click the Add Button			
Drag and Drop Zone Files List			
	14		
Scan File			
Attach Files	14		
Thanker that is a second	7		
L	10		
- Index Fields			
= Index Fields			
When adding folders in bulk any attributes populated will be associated to each folder.			
To manually add or modify these attributes locate document in Document Management and right click on the Folder and go to M	lodity Fokler Details		
	and the second se		
Notes :	7		
Adding Password Encrypted documents is not supported.			

4.2 Add Documents from Document Management (DM)

To add documents from Document Management, select Add Documents From DM.

Training - Request: 21-00006-TRN 📑	Remain	ning Days: 20	Status: Request for	Docs Sent		NEXT
Request Information	Review Log Docum	ents 🔨 🗸				
Assign Users	Add Documents	Add Documents From DM	Add From Correspondence Log	Refresh		
Set Perfect Status	File Cabinet	GUID	Document Crea	ited Date Date Addec	Sections Pages Re	dacted? Recent Layer Modified By
Correspondence	There are no review log	s to display Page size: 20 💌				Q items in 1 pages
Request for Documents (0/1)	Open Rocuments .	Open All Documents				
Add/Search/View Documents (0/0)	Note: To remove do	cuments from the Revie	w Log you must select and Ope	n the document(s) ir	Document Manager	nent.
Fees/Billing	Request Folder Doc	uments				
Final Actions		Add Documents From DM	Add From Correspondence Log	Refresh		
Deliver Documents	File Cabinet	GUID	Document	Created Date Date	Added Sections Pa	ges Redacted? Delivery Status
Stop the Clock	There are no request for	Iders to display Page size: 20 -				0 items in 1 pages
Notes (0)	Open Documents	- Dom All Documents				
Task Reminders (0/0)	Note: To remove do	cuments from the Requ	est Folder you must select and (Open the document(s) in Document Mana	gement.

Enter the folder information to search for the documents. Click **Search** and check the box for the folder(s). Then select **Open Folders**.

	Folder Name		Intlude Sections				Created Date	z	30		
	Full Text Search		(1-m) (-21)				Created By	0			Per l
	File Cabinet Drawer Fiat	al van 2024 Rasponsier Documents (1257)	-				Action Office	Exer Sec.		Page 1	
	Added To						Folder GUID	: D			
Custor	n Fields							Clastom Field	that are common ec	rons the unlected File Ca	abinat Drawers are clispla
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										/	Open Folders
elders	lieve (Search)					_					
	Folder Harm	file Caloinet	Felder GUIE	Sector	Pages	OCR Etama	Reducted	Created Date	Modified Date	Focied To PRR	Published Data
0	Low Reports	Fairs the 2011 Person - Document	00000130286		215	Serve	Ne	64/15/2821	04(05/2021		
0	23-0048T-84	Angel Year 2001 Regionance Documents	facot (nodo)	- 6	515	Done	10	(64)(6)(2021	04/05/2021	NO	
	Call Renta	Facel New 2021 Responses Documents	(00001110.101)	30	200	Done	Yes.	VA(8-223	0406/2021	100	
0	Jam Boursen	Facal Year 2021 Responses Documents	00000130282		474	Donia-	144	64/65/2021	D4/05/2031	No	
	Second Second	Free We 2011 Reported Documents	10000130265	1	329	Do/H	N=	64/02/2021	04/02/2021	(App)	
13.	LOAD Performs	Facel Ver 2021 Responses Documents	00000130261		134	Done	140	64/69/2021	D4/02/2021	160	
	ullen Rectoral	Fallel New 2021 Remonance Documents	10000111/121	T.	£10	Dere	14=	64/12/2021	MARGINERY	141	
0	21-00024-5-74 (Prider) Restored in Rest	d Fazal Wei 2021 Responses Documents	00000130242		29	Dovia.	Nej.	04/02/2021	the pair (sing)		
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	under discusser the	Fearly Well 2023 Responses Documents	1002031120247	- A.	304	Done	140	04/02/2021	IM/82/0071	160	
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-				_	_						Open Folder

4.3 Add From Correspondence Log

To add documents from the Correspondence Log, select Add Documents From Correspondence Log.

Request Information	Review Log Documents	
Assign Users	Add Documents Add Documents From DM Add From Correspondence Log Ret	resh
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set renew status	There are no review logs to display	
Correspondence	K S 1 Page size: 20 -	0 items in 1 page:
Request for Documents (0/1)	Open Documents Open All Documents	
	there is a survey of a survey from the De for the survey of a low of the survey of the	
Add/Search/View Documents (0/0)	Note: To remove documents from the Review Log you must select and Open the d	ocument(s) in Document Management.
	Request Folder Documents	ocument(s) in Document Management,
Fees/Billing	Request Folder Documents	ocument(s) in Document Management,
Fees/Billing Final Actions	Request Folder Documents	
Fees/Billing Final Actions Deliver Documents	Request Folder Documents	resh
Fees/Billing Final Actions Deliver Documents	Request Folder Documents Adid Documents Adid Documents Adid Documents File Cablinot GUID Document Create	resh
Add/Search/View Documents (0/0) Fees/Billing Final Actions Deliver Documents Stop the Clock Notes (0)	Request Folder Documents Add Documents From DM Add From Correspondence Log Ref Add Documents Add Documents From DM Add From Correspondence Log Ref Image: File Cabinet GUID Document Create There are no request folders to display.	renh Id Date Date Added Sections Pages Redacted? Delivery Statu

Select the File Cabinet Drawer and check the files you wish to add. Then select Add.

Decision	Management Options		and the second se					
	et Drawer" : Highling 2011 Responses	Dogin Metti (1237)	-					
	Adding Pages				D	ocument Format (Image/Nativ	e)	
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dd Docur	menta							
Add to	the Review Log Request #21-00006-TRN			O Open in Document Ma	nagement upon J	6b Completion		
orrespon	dence Log							
	Subject	File Name	User	Status	Made	Local .	Disputched Date	Action Date
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10	EDIA Request Assignment - 11-00005-17th	FOIA Request form.pdf	Middleton Deihawn	Reg for Docs/72435	É-venué	edlowmanager@ed.gos.robeit.w.,	104/05/2021	4/5/2021-2:23:03 PM
[]	Resumpt Description	FOIA Request torm.pdt	MittBeton Destrawn	Repowed	E-mini			4/5/2021 11:33:25 AM
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Index Fi	elds.							
	g folians in bulk any annihytes populared will be add or multify these attributes locate shocument		the Folder and go to Monthy Folder De	teit.				7

Once you have selected which folder you would like added, then click Add Folder(s) to...then select Add Folder(s) to Review Log:

📔 🖨 🗙 • 🚊 🗟 🖪	Add Folder(s) to 👻 🌉 Show 🔹 🖽 🔍	a, 🖂 🖸 🗗 📴
🗹 🎒 Documents 🖻 🗑 🔝 Fiscal Year 2021 Responsive Documents	Add Folder(s) to Review Log Add Folder(s) to Request Folder	
E 21-00001-F OPE TRN(3)		

A confirmation window will pop up to confirm that status of the request change. You will then select Yes:

Add Folders To Roview Log	
Folders	[main]
Policies -	PerChant
11 instato # (200 1200)	Total in 20 Automationers
Comments	No - vili continue suthout changing status.
Review Status Details	
Review Stand :	

After adding documents, your status should now read "Documents Added to Review Log."

ne Requesters - Requests -	Document Mana	gement - Adn	ninistration Repo	rts	Request #	•	0
Home >> Requests View IQuick Search Keyw	ord 1 21-00006-TRN1 >>	21-00006-TRN - Reques	t				Note: * fields are man
Training - Request: 21-00006-TRN	Remaini	ng Days: 19	Status: Documents	Added to Review Lo		-	1
Request Information	Review Log Docum	ents			-		
Assign Users	Add Documents	Add Documents From DM	Add From Corresponde	nce Log Refresh			
Set Perfect Status	🛄 File Cabinet	GUID	Document	Greated Date Date	a second at second		Recent Layer Modified
		1 Re 00000127524	21-00001-F OPE TRN	02/25/2021 04/06	2021 0	3 .No	
Correspondence	K (I) N	Page size: 20 -					1 itemi in 1 pag
Request for Documents (0/1)	Open Documents	Open All Documents					
Add/Search/View Documents (1/0)	Note: To remove do	cuments from the Revie	w Log you must select a	nd Open the documen	t(s) in Documen	t Management.	
Fees/Billing							
Final Actions	Add Documents	Add Documents From DM	Add From Corresponde	nce Log Refresh			
Deliver Documenta	File Cabinet	GUID	Document		Date Added S	ections Pages	Redacted? Delivery Stat
Stop the Clock	There are no request fo	lders to display					

5. Reviewing Documents in Review Log

To review documents in the Review Log, select the green **NEXT** button and then click **Perform Action**.

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Home Requesters Requests •	Docu	nent Management 🔹	Administration	Reports	biages.#	-	Q
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Training Request 21-00006-TRN		Perform Next Action - 21-4		ennunte Addad in Paci	-im		CINEN
Request Informatio		Current status of this req		ded to Review Log			
Assign Users	Add	Select Action :	View Review Log				
Set Perfect Status	÷		\rightarrow	Pesform Action	Close Sections	Pages Reducted) Form	t Layer Madified By
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Beliver Documents					tical Se	ction Pages Selices	C Delivery Status
Stop the Clock	There						

In the Review Log window, select the "+" icon next to the folder that you want to review to display the pages in the folder. Note: If you are reviewing a folder that has been redacted, you will be asked if you would like to load a review layer. If you load a review layer and make changes, create a new review layer when prompted to save. Ensure you save your changes as they are made.



Review each page to determine if redactions are required. If a redaction is required, select the **Redact** icon or **Polygon Redact** icon to highlight your redactions.



After redacting using the redact tool, select Redaction Code(s) that apply and click Select.



Save your review layer and create a Layer Name.

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	Are finded and a set of the review layer. Once saved the review layer Decontinuor, your must name and save the review layer. Once saved the review layer Decontinuor, your must name and save the review layer. Once saved the review layer Decontinuor, your must name and save the review layer. Once saved the review layer Decontinuor, your must name and save the review layer. Unce the review layer Decontinuor, your must name and save the review layer. Unce saved the review layer Decontinuor, your must name and save the review layer. Unce the review layer Decontinuor, your must name and save the review layer. Unce the review layer Decontinuor, your must name and save the review layer. The review layer of 21.00001.1 OPE TRN Decontinuor, your must name and save the review layer. The review layer three Decontinuor, your must name and save the review layer. Here Decontinuor, layer three Decontinuor, layer threview Decontinuor, layer three Decontinuor, layer three	
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Once you have created your review layer FX will save the redactions made and the newly created review layer will generate at the bottom of the page.

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Select the **Save to Disk** icon in the top left hand corner. Enter preferences and select **OK**. Wait until the job status says "*Completed*" and then select Download to download to a zip file or **Close Window**.

Danwell)-	Save Te Disk- Page 1 (10/12/2018)		D ×
A Time I NOTITING ATMOSPHERE	Location : My Jobs Output File Format	140-	Save in Black & white
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			-

6. Moving Folders from Review Log to Request Folder

To move folders from the Review Log to the Request Folder, select the Add Folder(s) to request Folder tab.

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Select the folders by checking the box, select the review status and select **Add Folder(s)**. Wait until the Job Status reads "*Completed*" before selecting **Close Window**.

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Folders									
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A Summing		2177 - 40 - 52	b Progress 51 - Progress de Progress Information arrent Action	Close Wride		tus: Completed			

To exit the Review Folder, select the Close icon at the top of the page.



7. Final Actions

The request status should now read "*Documents Added*". Select the green **NEXT** button and then **Perform Action** to complete the final actions.

Requesters - Requests -	Document Management Administration Reports Request	
nne >> Reducesta View. (Duick Search Key	ieward: 21-0006-tm1 >> 21-0006-TRN - Request Note: * fields are mandatory	K
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dd/Search/View Documents (0/1)	Note: To remove documents from the Review Log you must select and Open the document(s) in Document Management.	
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	Fiscal War 2021 Res., 00000127524 21-00001-F-OPE TRN 2/25/2521 2/25/2621 0 3 Ves No Pages Deli.	



Enter the Disposition Accepted Date, Reportable Disposition, Multi-Track Type, and Discretionary Release option(s) and select **Save**.

Home Requesters - Requests -	Document Management • Administra	ation Reports Storest	. 0,
-	ord : 21-00006-bm1 >> 21-00006-1784 : Repuest		Note: " fields are mandatory
Training - Request: 21-00006-TRN 🦛	Remaining Days. 19	Status Documents Added	(TOP)
Request Information	Disposition		
Assign Users	Requested Date = 04/05/2021	FOIAXpress Calculated Disposition = Granted/Denied in	
Correspondence	Received Date 04/05/2021 Target Date 05/03/2021	Reportable Disposition" Granter Carried and	at a
Request for Documents (0/1)	Disposition Accepted Date" : 4/6/2021	Multi-Track Type"	
Add/Search/View Documents (0/1)	Perfected Yes	-	
Fees/Billing	Note: Update each Disposition listed below as TBD	to calculate the Reportable Discussion	
Final Actions	Request Descriptions	Double-click on each line item to	unista the 'TBD' action
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Extensions (0/0)	Was a discretionary release of information made fo		
Appenis (0)	Discretionary Comments	Discretionary Code	
Logi/fleports			
More Actions			
	Notes		

8. Deliver Documents

The request status should now read "*Disposition Accepted*". Select the green **NEXT** button and then **Perform Action** to deliver documents.

Home Requesters + Requests +	Docur	nent Management - Administration	Reports	Separat P	-	
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Training - Request 21-00500-TRM	1		Dissostition According			
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Select the folders and then click the Deliver Documents icon at the top of the page.

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C Department of Education Line 5 🚯 FSC Research Proje	🗋 Login 🧕 Veritas eDiscovery	5 FOIA Service Center	ocio Office of the C			C Oth	er favorites
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21-0006-TRN - Document Delivery E Front Year 2021 Reportment Documents							200

Select pages and then select **OK**. Select the Delivery Type, Delivery Mode, Output Format, and other preferences for delivery and then select **Deliver Documents**. If you have a final response letter that isn't a template in FOIAXpress, you will need to upload your letter to the correspondence log by uploading in the "Receive Correspondence" section. After uploading the final response letter, you then go to the "Correspondence Log" section, highlight the letter, then select "Save for Final Response

Pages		×
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Coordinations from the state	nent Delivery Type Trinsl isude: Include Final Response La Select a Letter Format Action Office: Letter Templates:	rtier	Requester Information: Request Shipping Address New Request 400 Maryland Avie Sty Washington.20002 Address information can be edited I** Delivery Options	Bing Address
-	If your file appears in rec clude Review Objects: Comments Box Highlight	or not at all then it is of an invalid correspondence format Other Options Include Fully Redacted Pages Hide Codes	Delivery Mode **	Dispatch Date: 4/8/2021
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The sector of the sector is the	Deliver Documents - 21-00006-TRN				
el cua a reason e commerciale	Highlight Include Fully Reducted Straight Line Hide Codes Billpise Hide Reduction Border Stamp Black & White Sticky Note Include Fully Reduction				
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	Include Annotation Text				
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Select **OK** when asked if you want to deliver documents for this request. Wait for the Job Status to say "*Completed*" before clicking **Close Window**. Then use the **Close** icon at the top of the Document Delivery window.

9. Closing a Request

The request status should now read "*Documents Delivered*". Select the green **NEXT** button and then **Perform Action** to close the request.

lome Requesters - Requests -	and the second second	Management - Administratio	on Reports	Amaretit		_
Home Amount free flock front by	Curre	ent status of this request is <u>Document</u>	s Delivered	-	_	-
Request Information		Select Action : Close Request	Perform Action	Close		
Hanign Dans.			A	Close		
Request for Disconnects (0/7)						
Add/Search/View Desamin(s)(0/1)	De					

Enter the Closed Date, Number of Pages Released, Number of Pages Reviewed and the Number of Records Posted for Public Inspection. Then select **Save**.

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litrup the Cleck	Number of Pages Reviewed*	Generated Count 13		
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Answer Yes or No to the prompt regarding fees and select Yes to confirm closing the request.

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donn >> Escund, Ven, Clurk Seatth Kennert	<u>11-00006-7890</u> >> 21-00006-7890	Request			Note	fields <i>we</i> mandate
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me Requesters - Requests -	Document Management	Administration	Reports	Request +		Q,
Home >> Report Versil Court Search Klesson	<u>d. 19-00006-1960</u>) >> 24-00006-10%-7	et ea			Note T	elds are mandato
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Close Request Stop the Clock	Number of Pages		Generated Count :			
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The request status should now read "Closed" (and determination status).

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Fees/Billing	Request Details Action Office* : Ex	ec Sec			

10. Find and Redact Tool

The "Find and Redact" tool can be used to search in a folder/page and redact what is being searched. ****** A line by line review will need to be performed to confirm proper redactions have been made. ******

Click Find and Redact.

The Find and Redact window will be displayed as shown below.

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Under the *Find What* section, click the drop-down menu and select the type of text you want to search for. **Word/Phrase** will be selected by default. The selections under this menu are described below:

Selection	Description
Word/Phrase	Any word or phrase, as entered in the provided text field
Credit Card Numbers	Any credit card numbers appearing in the selected documents
Currency	Any currency figures appearing in the selected documents
Email Addresses	Any email addresses that appear in the selected documents
Employer ID Numbers (EIN)	Any Employer ID Numbers that appear in the selected documents
Social Security Number	Any Social Security Number sequences that appear in the selected documents
Telephone Numbers	Any telephone numbers that appear in the selected documents

Enter the text you want to find (if applicable) and redact in the text box.

To further refine your find and redact search using "AND" or "OR" operators,

click the _____ icon, and then select AND or OR.

For additional information about search operators and Full Text Search, click the icon.

In the *Redact* section, click **Select Codes**. The *Select Redaction Codes* window will be displayed as shown below.

	(b)(3)	Permits withholding of records or information if a law specifically exempts the material from disclosure	
	(o)(4)	Permits withholding of records related to trade secrets and other confidential business information	
Q	(b)(5)	Permits withholding information under the deliberative process privilege. Including the pre-decisional documents, or information that could be withheld under civil discovery, attorney-client, or attorney-work product privileges.	
Ö,	(b)(6)	Permits withholding of records and information about individuals when disclosure would be a clearly unwarranted invasion of personal privacy.	
a,	(b)(7)(A)	Permits withholding of records when interference with law enforcement proceedings can be reasonably expected	
0	(6'(7)(8)	Permits withholding of records when a person would be deprived of a fair trial or an involution with direction	-
	Statute Code	Description	
	5 U.S.C. app. s_	Financial disclosure information pertaining to certain government employees	
	SUSC app re_	Financial disclosure information pertaining to certain government employees	m 1
D.	36 USC 6103	Tax Return Information	-
	44 U.S.C. 8 350	Data or information acquired under a pledge of confidentiality for exclusively statistical purposes	*
	ove Codes to Margin		ancel

Select the Redaction Code(s) you want to apply.

If you select the b(3) Redaction Code, you must also select a **Statute Code**.

Click one of the following actions:



Action	Description
Find & Strikethrough	Find items that satisfy the search criteria, and then draw a line through the results.
Find & Create Highlight for Review	Find items that satisfy the search criteria, and then highlight the results for review.
Find and Redact	Find items that satisfy the search criteria, and then redact the results.
Cancel	Exit the Find and Redact window.

11. Cost Sheets

FOIA Requesters may be charged a nominal amount for the processing of their Requests, including search, duplication and review costs (Review costs include only direct costs incurred during the examination of a document for determining if it is a responsive record.) Estimating the effort to fulfill requests prior to completion is known as Cost Estimation. The cost for processing a Request can be estimated while the Request is in any Request Status where the Request is open. These costs are estimated using Cost Sheets.

Open a Request for which you want to estimate the cost. Click Fees/Billing. The

Fees/Billing screen will be displayed as shown below.



From the *Cost Sheets* section, click **New**. The *New Cost Sheet* screen will be displayed as shown below.

Cost Sheet Date"	4/12/2021		Name* 1	
lote: Fee items with " are used to calculate		Notes -	Osiantisty	Extended Volum
Frie llaves	Description	Unit Rate	Quantity	Estimated Value
EARCH!	Search for Commercial Businesses	1 11.70 /1 HOUR(5) Variable	0.00	0.05
EVIEW	Resiew	19.70 / T HOUR(S) Variable	0.00	0.00
EVIEW" S-02		CEED	1.25	
Edecti ·	Search	1203 /1 HOURIS Variable	0.00	0.02
EVIEW"	Review	1203 / Y HOURS) Variable	0.00	0.05
5-03		and the second second		
EARCH *	Search	15.13 /T HOUR(S) Variable	[0.00]	0.00
EVIEW	neview.	13/15 / T HOUR(S) Variable	0.00	0.02
5-04				
EARCH* EVIEW*	Search	14.74 /T HOLIRIS) Variable	0.00	0.20
EVIEW*	Reserve.	14:74 //T HOUR(5) Variable	0.00	0.02
S-05				
ARCHT	Search	16.49 /7 HOUR(S) Variable	1000	0.02
EVIEW **	Review.	16.49 /1 HOUR(5) Variable	0.00	0.05

			Administrative Cost : Total :	0.00	_
Caples			6.00	000	-
		3.00 /1 DISICISI Variable	6.00	.0.00	
Copies Copies - CDs Elfable		The Prevent tradely	Test.		
REVIEW"	Residen	Stan /1 HOURIS) Variable	0.00	000	
SEARCH	Search) Review	19829 /1 HOLIRUSI Variable	0,00	000	
GS-15					
REVIEW"	Séarch Réview	Strag /1 HOURS) Variable	6.00	000	
GS-14 SEARCH*	Séarch	S0.82 /1 HOURIS) Variable	0.00	1000	
35-14					
REVIEW.	Search Reinew	43.09 /1 HOUR(5) Variable	6.00	0.0	
GS-13 SEARCH	Search	41.mp //1 HOUR(\$) Variable	100	wag	-
REVIEW *	Review	(38.22) //1 HOLIR(S) Variable	1.00	0,00	
SEARCH"	Search	[36,23]/1 HOUR(5) Variable	0,00	2.00	
EVIEW"	Review	ac,23 /7 HOUR(S) Variable	0.00	0.00	

Enter information in the following fields as necessary:

Field	Description
Name	Enter the Name of the New Cost Sheet in the upper right corner. You can enter Request number as Name.
Quantity Enter a Quantity for each Fee Item. Quantity refers to number of pages, copies, etc. for each Fee Item.	

Click Save. A verification message will be displayed as shown below.



Click **OK**. A confirmation message will be displayed as shown below.



Click OK.

If the Requester has applied for a fee waiver, information about the fee waiver type will be displayed on the *Cost Estimation* screen.

If there is a change in the fee structure, it will be applied only to new invoices. Existing invoices will always be displayed with their original fee structure.

12.Create an Invoice

You can create one or multiple Invoices for a Request. Each Invoice is generated with a new Invoice number, and you can collect payment for each Invoice. Multiple Invoices can be modified or deleted, however, you cannot delete the most recent Invoice or an Invoice on which a payment has been collected. In addition, you must create a Cost Sheet before an Invoice can be created.

You can create multiple Invoices with different Invoice amounts, but cannot access the *Estimate Cost* screen once an Invoice is generated.

Open the Request you want to generate an invoice for. Click **Fees/Billing**. Select the Cost Sheet you want to use to create an Invoice, then click either **Create Invoice**. The *Fees/Billing* screen will be displayed as shown below.

raining - Request: 21-00006-TRN 😽	Remainir	ng Days: 15	Statu	: Disposition	Accepted			NEXT
equest Information	Summary							
ussign Users		ount Paid ÷ \$0.00			ue : \$0.00		Willing Amount	
orrespondence	-	Amount : \$0.00		Payment Sta	tus : No Charges	Pre-F	Payment Amount	\$0.00
equest for Documents (1/1)	Cost Sheets	Invoi	ec 4	Created By	Cost sheet Date	Modified By	Modified Date	Amount (\$)
dd/Search/View Documents (0/2)	and the second se	1000		Million Danis	Contraction of the second second	Miccinon Deni	ore concerning	655673
ees/Billing	K C T S H	Page size: 20 -					Tota	\$55.73
inal Actions		iew Delete	Create Involce	-				r nens in r pages
eliver Documents	Invoices		Contraction	7				
lose Request	Invoice II	Created By	Invoice Date	Modified By	Modified Data	Extended (\$)	Not Charged (\$)	Charged (\$)
top the Clock	There are no involces to d	splay woices/estimates are	based on old fee	tructure.	Total :	\$0,00	50.00	\$0.00
lotes (0)		Page size: .20 •						Oliterru in 1 plages
ask Reminders (0/0)	Eon Deleter	Export Sent	Payment	int Billing Address				
octensions (0/0)	Payments							
uppeals (0)	Created Date There are no payments fee	Invoice #	Received B	Paymen	t Type in	voice Total Am	ount Paid R	emaining Bal
A DAMES & A	mere are no payments re-							
ogs/Reports	10 0 1 3 3	Page size: 20 •						0 illems in 1 pages

The *New Invoice* screen will be displayed as shown below. Make any changes to the Invoice as necessary. Click **Create**.

Invoice Memo :	Please mail your payment to the follo U.S. Department of Education Office of the Executive Secretariat	wing address,			-		Greate Close	ž.
				Total :	55.73	3.00	52.73	
			Administrative		7.27	0.00	7.27	
Copies		0.20	/1 COPIES Variable	0.00	0.00	0.00	0.00	
Copies - CDs Billable		3.00	/1 DISK(S) Variable	1.00	3.00	3.00	0.00	
Copies								
REVIEW*	Review	59,89	/1 HOUR(S) Variable	0.00	0,00	0.00	0,00	
SEARCH"	Search	59.89	/1 HOUR(S) Variable	0.00	0.00	0.00	0.00	Î
GS-15								
REVIEW*	Review	50.92	/1 HOUR(S) Variable	0.00	0.00	0.00	0.00	1
SEARCH*	Search	50.92	/1 HOUR(S) Variable	0,00	0.00	0.00	0.00	1
GS-14		1.0004		10000		1 Leves	- 1 (1225)	
REVIEW*	Review	43.09	/1 HOUR(S) Variable	0.00	0.00	0.00	0.00	
SEARCH*	Search	43.09	/1 HOUR(S) Variable	0.00	0.00	0.00	0,00	
GS-13	Review	36,23	/1 HOUR(S) Variable	0.00	0.00	0,00	0,00	
SEARCH*	Search	36.23		0.00	0.00	0.00	0.00	
	and the second se	12222	/1 HOUR(S) Variable		1000	1 1242	1 13.44	1

A verification message will be displayed as shown below.



Click **OK** to save the new Invoice.

Figure 4 and a strength of the Willing Amount, you will receive a message asking if you want to place the Request on hold, as shown below.

?	Invoiced Amount has exceeded the willing amount. Do you want to place the request on 'Hold'?
	Yes No

Click **Yes** or place the Request on hold, click **No** to return to the *Fees/Billing* screen. If you clicked **Yes**, you will be taken to the *Stop the Clock* screen.

To place the Request on hold from the *Stop the Clock* screen, follow the "Steps to Stop the Clock" under <u>Start/Stop the clock</u>.

Your system may be configured to prompt to send correspondence. If so, you will receive a message asking if you want to send correspondence to the Requester. Clicking **Yes** will take you to the *Correspondence* tab.

Corresponder	nce
Do you want to s	send correspondence to the requester?
	Yes No

If the Invoiced Amount is less than \$25, the system will prompt you with a message asking whether you want to accept the charged value or waive it and move all costs to the *Not Charged* column.



If you click OK, the charged value you have set will be accepted.

If you click Cancel, you will need to move all costs to the Not Charged column for the invoice to generate.

Fee Waiver, Start Date and End Date will be displayed only if you have selected the Fee Waiver Requested checkbox on the *Request* screen. Once you enter the Start Date and End Date and click Modify Invoice, the dates will be displayed on the *Request*

13. Intake

13.1 Receiving a New FOIA Request 20 ED FOIA Manager - 7 2015 - ED FOIA Manager - Microsoft Outle - IO X Conterenong Home Send / Receive 17 Meeting Move to: 7 Ignore ia To Manager 53 N Find a Contact 1 XQQQ 3 6 Clean Up 🐼 1M - 🔛 Team E-mail J Done Address Book Wove Rules OneNote Linread/ Categorize Follow Read Up -New New E-mail Items + & Junk + Delete Reply Reply Forward to More - Reply & Delete T Create New V Filter E-mail * Deleta Respond Quick Steps Mave Tagi New Find ÷ Search ED FOIA litanager - 7 20 15 (Ch1+E) P a new FOIA request . - Dirarts Newest on top - -Sent Items Arrange By: Date Dirk Rousseau <DRousseau@im-ag.com> fue Deleted Items [17] Mon 7/20/2015 4:39 PM 4 Vesterday ED FOLA Manager 70 Junk E-mail (1) 130 AM: FW: Over Tue 12:32 PM ED FOIA Manager Outbox RE: New FOTA request RSS Feeds Hello, Tue 10:29 AM Spencer, Donna Search Folders PWI bist of Higher Education Institutions Investigated for-I would like to request a copy of each of the Archive - Alice.Jones@ed.gov following Upward Bound-Veterans (VUB) Grantees 4 Monday sight Coordinatio. # ED FOIA Manager Grants.gov applications. I am willing to pay any fee Mon 6:26 PM Spencer, Donna associated with making these FOIA requests. Please send 4 🔁 Inbox (11) FW! Equetteville State and OCR recolution Trequent Requesters the FOIA to 1030, 15th street NW Washington DC or via email Rebecca Williams Mon 4:41 PM EN FYLCLI to drousseau@im-aq.com. DI INTAKE (Handle, Reassign) Mon 4:39 PM Dirk Rousseau INTAKE (Request Status Log) PR Award Number: P047V120001 Grantee: Davis & Elkins a new FOIA request INTAKE FSC Holline Messages (1) College Mon 1:00 PM 4 F. E. Fisher MISC. PR Award Number:P047V120089 Grantee: Southeastern New FOIA request Louisiana University Today: 59 Need to Follow Up (29) Mon 12:10 PM Robinson, Shauna - San Francisco FOIA Request - Office for Gml Rights New FOLA Requests 6 26 15 If you need any more information please feel free to Mon 9:00 AM 🔁 Wehausen, Robert Tasks 6 29 15 contact me. FOIA Request 6 30 15 7115 4 Last Week 1 7 10 15 Dirk Rousseau | Research Analyst Fri 7/17 Ca Wills Robinson 7 13 15 McAllister & Ouinn LLP Quick Contacts Freedom of Information request - Use of credit card 1030 15th Street NW |Suite 590 West | Washington, DC 7 14 15 🕞 Jed Serliner Fi(7/17 20005 | Phone: (202) 296-2741 7 15 15 Inability to Complete FORA Request Fax: (202) 296-2751 (b)(6) 71615 www.im-Fn 7/17 5, Daniel Carter aq.com 7 17 15 FOTA Request: Open Title D: Sexual Violence Investigator 7 215 Tue 7/14 Peter Frank 20-15 equired Textbook Information ~ 7 21 15 7615 22 4 2 7715 Dirk Rousseau 7815 Connect to social networks to show profile photos and activity × 7915 inpilates of your colleagues in Gutlook. Click here to add netv There are no items to show in this view. G Mail

- 1. Select Inbox from the ED FOIA Manager (EFM) Mailbox.
- Review email messages, from bottom to top (first in-first out), in the Inbox to determine if a new request has been received; (*check the Junk folder as well, move any requests to the* Inbox)
 - a. If YES, Move the request to the <u>"1. NEW REQUEST"</u> folder in the EFM Inbox *
 - b. If NO, handle accordingly by marking each email with the preassigned colorcoded categories, i.e. Action Required, Process and Close, Updates/Voicemails, Reassignments, etc. and move these items to the <u>"5. Action Required folder."</u>
- From the <u>1. New Request Folder</u> save each new request as "Last Name" in the form of a PDF on your desktop for easy access later. Once saved mark with the solid red follow-up flag.
- 4. Check USPS mail and the fax machine for new requests as well and ensure none are duplicates of prior requests. These requests should be stamped with the current date, scanned to your email address and then saved on your desk top with the others. Be sure to forward a copy of the request to the EFM mailbox to be saved along with the others in the <u>"1. New Request folder."</u>

In addition, when handling requests that were delivered by mail, be sure that the request itself, as well as all attachments, are organized. The request letter should be on top. The envelope that it was delivered in should be last. Date stamp the 1st page of the request letter with the current date. Then, scan each request separately to YOUR inbox. Perform this procedure manually so that the envelope gets scanned with the document to which it belongs.

When you return to your computer, drag and drop the attachments from the emails you received from the scanner onto your desktop screen and rename them (open the request and see who the requester is). Each request should be named with the requester's last name followed by the word 'request.' It should look something like this: Johnson Request. Once you have concluded that all scanned requests have been accounted for, you may shred the hard copies.

Lastly, send each scanned request separately via email to the EFM inbox and repeat the step as described in the 'note' and in element one above. Once this process has been completed, all other requests that are delivered to the inbox or via mail will be processed in the next batch of intake on the following business day.

5. Create a folder on your desktop for that day's intake. By doing this, you will be able to keep all intake sheets together in one place. Open the Intake Sheet A. Position it so that you can still see a portion of your desktop. You will need the free space for dragging and dropping items. The Outlook window will be on your other monitor. You need to be able to see both monitors. Starting from the bottom, drag and drop the email on your desktop beside your intake sheet. Rename the email with the requester's name followed by the word 'request.' If there are attachments, drag those and label them for what they are. See examples here: Johnson request

Johnson COI

Johnson Clarification

Do not make any shortcuts when naming documents. It is important for everyone involved in the FOIA process to be able to see what a document is without having to open it. When handling requests that were scanned, you only need to drag the request to your desktop, not the email that came from the individual who scanned the request, as stated in element four above.
In the paperclip portion of the intake sheet, drag/drop all items there. Open the request, review it and complete the intake sheet. Be sure to determine if the request is a FOIA, PA or FOIA/PA. If the requester is asking for records that you are unsure of, use the **intake cheat sheet** for guidance. If the information is not on this sheet, refer to the ConnectEd intranet site and search for the record there. By doing that, you will most likely be able to find a related document or website link. At this point, you may be able to determine which program office handles that kind of record. If you are not able to find any related information on ConnectEd, then Google it. Just make every effort to locate the information. If you are still unsure, leave a note in the 'comments section' for the intake reviewer, followed by your initials. Then, he/she will research it and find the answer. Be sure to complete all sections on the initial intake sheet.

If a requester has sent more than one request that can be handled by the same program office, combine the requests by dragging/dropping them into the intake sheet. The requests should be name something like this:

Johnson request 1

Johnson request 2

If a requester has sent more than one request and they are for different program offices, still name the requests as described in step #6. Then proceed with processing these separately.

After completing all other sections, go to the 'comments section' and type the requester's name followed by a colon. It should look something like this:

Johnson:

Johnson 1&2 Combined:

Johnson 1:

If a requester has sent in a request and it is NOT AN ED RECORD, add this note in the comment's section followed by your initials.

For requests that are assigned to OS, OUS, OGC, go ahead and add the following note: OGC FYI TO PAT SHAHEEN, followed by your initials.

Now that you have completed the sheet, click on FILE, Save As... Then, name the initial intake sheet with the requester's last name followed by the word 'request.' Save it in the folder that you created for that day's intake. If there are several requesters with the same last names, name the intake sheet with the requester's full name. The purpose of this is to minimize errors with attaching incorrect docs. Do not overwrite on your intake sheet. Follow steps 1-10 to complete the intake for the rest of the requests.

Once the initial intake has been completed, check your work to ensure that everything has been done correctly and that the right attachments are with the corresponding intake sheets. **Do not prepare to send intake without checking your work!**

- 6. Create the electronic FOIA Intake Worksheet for each new FOIA request and attach a copy of the original request to each worksheet. Save on your desktop as "Last Name" request (*For example:* Johnson request)" for easy transfer to today's Intake Review folder.
- 7. Each completed worksheet should be saved on the Share drive to the designated folder for the current day.

- 8. Send an email to the designated reviewers. Be sure to "Cc" the Windwalker Federal FOIA Team Lead/PM as well as the other Intake staff.
 - I. Put TODAY'S INTAKE as well as the current date in the subject field: (*For example:* "TODAY'S INTAKE MM/DD/YYYY),
 - II. State that INTAKE for that day is ready for review,
 - III. List the last names of each requester.
- 9. Intake should be completed no later than 9:30 am each day. (If additional time is required, be sure to notify the reviewer(s) and the Federal FOIA Team Lead/PM). Requests received after this time should be processed the following business day.

13.2 Completing the FOIA Intake Worksheet

- 1. After reviewing the request, determine the following factors:
- 2. Is the request a FOIA, Privacy Act (PA), FOIA/PA, Consultation or a Not Ed Record (NER)? Then select that option from the drop down box marked "Request Type."
- 3. Review the request to determine which service area(s) is likely to hold the records being sought by the requester. Then check the box(es) for the service area(s) accordingly.
- 4. Select the "Requester Type" from the drop down box provided. (i.e. Other, Commercial, Media, etc.)
- 5. Select Complex for the "Multi-Track Type" unless it is determined that this request is a NER (Not Ed Record). If so, the multi-track type should be Simple.
- 6. Unless an amount is specified in the request, the amount the requester is "Willing To Pay" should be listed as \$25.
- 7. If the requester has asked for a "Fee Waiver" or "Expedited" processing, be sure to indicate this in the spaces marked, otherwise select "No."
- 8. You are the "Initial Reviewer." Select your name from the drop down box provided.
- 9. If the request is not clear and "Clarification" is required, check the box marked as such and provide any necessary notes in the "Reviewers Comments" area. Any additional information can be listed in the notes section as well.
- 10. If you determine that the request is a PA or F-PA a Certification of Identity and Consent form is required. If the requester did not provide one, then the box marked for such should be checked.
- 11. Attach the PDF for this particular request to the Worksheet and save the request as "LAST NAME request" (i.e Johnson request).
- 12. Once all requests have a completed worksheet, move them to the designated Intake Folder for review and send the notification email (see item 8. above) to the reviewer(s).

13.3 Preparing the email to be sent to the Intake Reviewer

- 1. Open a new email, highlight the entire intake inventory and drag/drop it into the email. Be sure that the amount of intake in the email matches the amount in the folder. This extra step will help to minimize errors when sending intake. It will help you to be sure that nothing was missed.
- 2. Insert the following template language:

Good Morning,

Today's intake is as follows:

3. List the last names of the intake. Be sure to add if there are any "Not ED Records." That should look something like this:

Johnson – NER Smith Williams Abbott James

13.4 Placing a request on HOLD in Intake

A request is placed on hold when a response or additional information is required from the requester (for example, an Address, Clarification, Certification of Identity and Consent, etc.). When this information is required the new request should be placed on hold. In this instance, a hold means that the request should be tagged in Outlook as HOLDING (yellow category). It should also be tagged for the item that the request is being held for, i.e. Clarification (green category) or Cert ID. Third Party Release (dark pink category), etc. A standard form letter is constructed to coincide with the request was received, the time frame for response is 10 days, 15 if by mail. Once the response is received, this information can be used to move forward with the request. You may need to follow-up with the approving reviewer to confirm office/analyst assignment once your response is received.

13.5 Generating a FOIA Control Number in FOIAXpress

- 1. Once the review of today's intake has been completed the reviewer will reply to your original email indicating the requests are ready for entry.
- 2. Be sure to check for any special notes/instructions regarding each request in the comments section of the approved Worksheet.
- 3. REFER TO SECTIONS 1-2 TO ENTER A NEW REQUEST.
- 4. Once you have followed the steps in sections 1&2, you are ready to send an acknowledgment letter. Click Correspondence, then "Letter Template" select <u>FOIA Acknowledgment Letter</u> or <u>Privacy Act Acknowledgment Letter</u> depending on which type of request you've just entered. After choosing the letter type click customize and the letter will populate. The subject line will prepopulate with the required information.

	ne Requesters - Requests -	Document Management	- Administration	Reports	Arrend A	•
Send Correspondence Correspondence Correspondence Correspondence Letter Add/Search/View Documents (0/2) Fees/Dilling Diric Scamer	Hame >> Requests View (Quick Search Keywa)	(d="21-00006+tm") >> 21-00006	5-TRN - Request			Note: * fields are man
Name Source Add From Assign Users There are no attachments Little Template Request for Documents (0/2) Peres/Billing Disc Fees/Billing Correspondence Log Correspondence	Training - Request: 21-00006-TRN 🥞	Remaining De	<i>ys</i> : 1	Statur: Amended		
Assign Users There are no attachments Correspondence Request for Documents (1/3) Add/Search/View Documents (0/2) Fees/Billing Correspondence Log	Request Information	Send Correspondence	Receive Correspondence	Correspondence Log		111
Correspondence Request for Documents (1/1) Add/Search/View Documents (0/2) Fees/Billing Correspondence Log	Alsion Users	Lange of the second sec	Source	Show	Delete	Add From
Request for Documents (1/1) Add/Search/View Documents (6/2) Fees/Billing Correspondence Log	Correspondence	There are no attachments				Letter Template
Add/Search/View Documents (0/2) Scamer Frees/Billing Date Date Date Date Date Date Date Dat						Pending Latter (0)
Scarmer:						Disk
Lamesbendenze Log	Add/Search/View Documents (0/2)					Scanner
Final Actions Interior Log	Fees/Billing					Correspondence Log
	Final Actions					Intraice Log
	Deliver Documents					Finit Requester Address

Select Action Office : Select Letter Template	for lot	
Select Letter Template	10 Day PD Follow Up Baguess 20 Day Notification Acknowledgment Letter Appeal Acknowledgment Letter Appeal PDC Notification Clanification Needed/Not ED Template Closeluit Checkling (FEQUESTNONARER) Expediated Processing Template Expediated Processing Template Expediated Processing Template Tew Weiter Granted Template Tew Weiter Granted Template Tew Weiter Granted Template Tew Harter Tew Frank Response POIA Acknowledgment Letter TSA R Final Letter Tull Relaxe Methink Provided GLOJAAR Response Letter Tull Relaxe Webhirk Provided GLOJAAR Response Letter	ilor (
	Internor Latter Teroplate Internor Weblinke provided Nor Records - Records Not Yinai Templata Nor Records - Records Not Yinai Templata Nor Records - Records Not Yinai Templata Perjury Req. Demplata Perjury Ana, Demplata Perjury Ana, Exemplata Perjury Ana, Exemplata Perjury Ana, Exemplata	

5. Review the letter to ensure no errors are present and make any necessary adjustments. Then, click "Add to List."



- 6. Click "User Action Office Email."
- 7. Under the drop down box for "Template" select either FOIA Acknowledgment letter or PA Acknowledgement Letter.
- 8. Click "Send Email."

mining - Request-21-00006-TRN	Remaining Day		Status: Amended		
quest information		Receive Correspondence		-	
sign Users	Name	Source	59.21 KB	Delete	Add From
rrespondence	FCJA Acknowledgment Letter dos	2 Template	69.211 KB	·	Letter Template
juest for Documents (1/1)					Pending Letter (0)
					Disk
/Search/View Documents (0/2)					Scanner
/Billing					Correspondence Log
Actions					Invoice Log
ver Documents	1				
e Request	Dispatch Mode : 🖲 Email 🔘	Print Save to Disk	Delivery Mode : E-mail	D	Print Requester Address
the Clock	Email Options	and to plate to plate	Dentery mode - 12 man		
	From Email Type* : User Er	naîl 💿 User Action Office Email			
es (0)	From" : Deshaw	n.Middleton@ed.gov			
Reminders (0/0)	Template : FOLA Ad	onowledgment Letter	• •		
nsions (0/0)	a second s		ledgment Letter - 21-00006-TRN		
eals (0)		Receipt 🔄 Delivery Receipt ter 💮 Other			
		n.middleton@ed.gov	-		
s/Reports	Cc:	raniadieton@ed.gov			
e Actions	Bcc :				
	Note: Email addresses should be s	eparated by a semicolon			
	"Times New Stas	B & U			
	Times new _ * _ sue	THE REAL PROPERTY OF			
	Dear New Request,				
	This is the Department's	acknowledgment of you	r request for information pu	ursuant to the Fre	edom of Information Act (FOIA
	5 U.S.C. § 552. Your requ	lest was forwarded to the	primary responsible office(s) for action.	
		nce or questions regardin	ng your request, please cont	act the FOIA Pub	lic Liaison at 202-401-8365 or
	EDEOIAManager@ed.gov				
	Thank you.				
	ED FOIA Manager				
	FOIA Service Center U.S. Department of Educa	tion			
	a second a second a second				
					Seng En

- 9. REFER TO SECTION 4 to send a request for documents (RFD).
- 10. Once the request has been entered completely and is in the Request for Docs status in FOIAXpress, refer back to Outlook's EFM mailbox and click the flag for the corresponding request. The flag will be replaced by a check mark to indicate it's been completed. Then, move the email to the "<u>3. Request ENTERED</u>" folder in EFM and you're done!

13.6 Receiving a New PAL FOIA Request

New PAL requests are received directly in FOIAXpress. The program assigns the PAL request a FOIA/PA number and provides the requester an acknowledgement of receipt. When the daily report is submitted suggested office(s) are listed in the comments section along with a request for analyst. An email is then sent with the correct office for assignment and the analyst to assign the case to. Once this email is received then you will need to complete the "Assign Request" and "Request for Documents" actions.



me Request	ers · Requests		Management +	Administration	Reports	Re	quest #		Q
toquests	est view par incoming	undrastal							
equests View (Se	arch]								
Request #	Request Type	Requestar	Organization	Primary User	Received Date	Target Data	Remaining Days	Request Status	Action
1.01522.7	HOIA	Epstern And	the Capitol Forum	Contar 1945 Discourt	04/30/2021	05/05/0621	1,000	Received	NEXTO
1-01520-F	FOIA	Merchant, Mahak		Queue PAL Moomi_	04/30/2021	05/28/2021	20	Received	NEXT 2
1-01519-E	FOIA	Edwards, Sylvia		Queue, PAL Incomi	04/30/2021	05/28/2021	20	Received	NEXT >
11-01518-E	FDIA	Cardenas, Eric	Matthews & Associ	Queue PAL Incomi_	04/30/2021	05/28/2021	20	Received	NEXT >
21-01517-E	FOIA	Cardenas, Eric	Matthews & Associ	Queue: PAL Incomi	04/30/2021	05/28/2021	20	Received	NEXT
21-01516-F	FOIA	Candenas, Eric	Matthews & Associ	Queue, PAL Incomi	04/30/2021	05/28/2021	20	Received	NEXT)
11-01515-F	FÒIA	Cardenas, Eric	Matthews & Associ	Queue: PAL Incomi_	04/30/2021	05/28/2021	20	Received	NEXT >
11-01514-F	FOIA	Adams Lauren	Women's Liberatio	Queue PAL Incomi	04/29/2021	05/27/2021	19	Received	NEXT >
11-01513-F	FOIA	Kautman, Benjamin	The Student Borro	Queue, PAL Incomi	04/29/2021	05/27/2021	19	Received	NEXT)
11-01510-E	FOIA	Biasell, Texa		Queue. PAL Incomi	04/29/2021	05/27/2021	19	Received	NEXT >
21-01509-F	FOIA	Chapman, Kathryn		Queue, PAL Incomi	04/29/2021	05/27/2021	19	Received.	NEXT >
1-01508-E	FOIA	Smith Monica	N/A	Gueue PAL Incomi	04/29/2021	05/27/2021	19	Received	NEXT)
K C 1 > N	Page Size 20 .							12 herrs	in 1 pages

Action Office* :	Exec Sec						
Request Type* :	FOIA			Primary Assigned*:	Queue, PA	L Incoming Req	
Received Mode :	PAL		*	Priority :	N/A1		
Multi-Track Type :	Complex		-	Delivery Mode :	PAL Downlo	ad	*
Requested Date*:	3/30/2022	盲		Method of Payment :	Select Meth	od of Payment	
Received Date* :	3/30/2022	盲		Original Received Date* :	3/30/2022	I	
Target Date :	4/27/2022	-		Original Target Date :	4/21/2022		
Estimated Date of Completion :	4/27/2022	m					
Extensions	er er			Perfected :	Yes		
Review Status :							

Enter the Action Office. If the request type is not a FOIA change to the correct request type.

Custom Fields		
Virtual Fo	older a	
Multiple Off	ices :	
OCO/OG	I FYI ::	
OGC Re	view :	
WH Re	view 1	
WH M	emo ::	
OCR Doc	set # :	
FSA An	alyst :	
OCR An	alyst :	
OPE Div	sion :	
OS An	alyst :	
Admin Se	arch ::	

If there are multiple office, enter then in the Multiple Offices field. If this request should be marked OCO/OGC-FYI and/or WH Review make sure to enter "Y" in the appropriate field.

Comments	
	Spell Check Save

In the Comments field enter:

"Date received in PAL": PAL request description and ack letter uploaded.

"Date assigned in PAL": (If FOIA number changed add "FOIA # changed to a PA or F-PA or F-IG"). PAL request reassigned to "POC(s)" and "analyst". RFD sent. Your initials.

14. Process & Close

14.1 Receiving Process & Close

1. Go to Folder 5 (Action Required) of ED FOIA Manager.



- 2. Working from the bottom up select email categorized as Process & Close/Interim. Read email thoroughly to determine specifics, such as the request number, is it an interim response or final, etc
- 3. Drag a copy of the email from Folder 5 to your desktop.
- 4. Check the email as complete in Folder 5 to identify it as the one currently being worked on.
- 5. Go to FOIAXpress and search request number.
- 6. In the Comments Section, along with the date and your initials, add the appropriate note:

Examples: 05/31/20: FSA (or whichever the action office is) interim/action complete, docs located, no docs located, or weblinks provided. DM (your initials)

Fee Waiver Requested	Yes No			
				·····
and the state		-		Drag and Drop Zon
Start Date	5/21/2020 T End Date	Tetermination	TBD	Scan File
E WILL GOLD	I request a waiver of all fees for thi			1
Fee Waiver Description	me is in the public interest because understanding of the operations of			Attach File
	models and any of the operations of	i denvines of the government	L MINU IS THUL	
				1
Fee Details				l
Fee Details	4 (http://www.com	Willing to	Day All Faar	l
Fee Details Willing Amount	\$: 25.00	Willing to	Pay All Fees	l
Willing Amount	\$: 25.00	Willing to	Pay All Fees	<u> </u>
Willing Amount	\$: 25.00	Willing to	Pay All Fees	l
Willing Amount	\$: 25.00	Utiling to	Pay All Fees	
Willing Amount + Link Request(s) Comments 5/21/20: PAL request de	\$: 25.00 cription and ack letter uploaded ssigned to FSA and 5, Lee. RFD sent.		Pay All Fees	I

14.2 Close Request for Documents (For Final Responses)

- 1. If the email from the program office is an interim response the request for documents should remain open and steps 8-10 should be skipped.
- 2. Go to **Request for Documents**, highlight the appropriate Program Office and click **Take Action**.

Request Information	Request for Documents	
Assign Users	Action ID Location(s) Referred Request Date Sent Date Due Date Completed Date State	ri.
Set Perfect Status	K K	1 items in 1 pages
Correspondence	New Take Action View Delets Send Email/Reminder Send Freninder	by Print Action(s) Log
Request for Documents (0/1)	1	
Add/Search/View Documents (0/0)		

- 3. Click the **Status** dropdown and select the appropriate status, example: Documents Located, No Documents Located, etc.
- Check the box by Completed and enter the current date in the Completed Date calendar box that appears. Click save. *Please note that if the Completed box is not checked the Request for Documents will remain open.

No	w Action - Request for Docume	nts -66122	0	
and the second se	Location : FSA - Federa	I Student Aid (Latoya.Tribue@ed.gov)		
no Roquesto	Action Date* : \$/31/2020			10
Game	Status :			
(C)& Require	Comments :			(110)
Analys. Ulter	Due Date* : 6/22/2020			-
sier Portoet Brand	Completee	1		(Internet)
Conversion		Drag and Drop Zone	~	Achimical Local
Request for Doc				
Bold/Gearch/Mich	Attachment :	Sigan File Attach File		
Pointelling		FOLA Bassion LAssion bu		
	1	PAL Request Formode	w!	

14.3 Change the Action Office

- 1. If the email from the program office is a final response, and is the only assigned office, the Action Office must be canged to **ExecSec.**
- 2. Click **More Actions** and select **Change Action Office**. In the **New Action Office** dropdown select **ExecSec**, and in the comments section enter action complete, prefaced by the name of the office the request is being reassigned from, example: **FSA action complete**.

01A - Request: 20-01696-F 🛛 🗍	Remaining Days: 14 Status:	Documents Added to Review Log	
Request Information	More Actions		
Assign Usera		1	
iet Perfect Status	E	<u>A</u>	
Correspondence	Change Review Status	Change Action Office	Copy this Request

3. Uncheck the assign request box and hit save.

	🔄 Change Action Office - 20-01696-F	×
ima Requesters - Requi	Current Action Office of this Request is Exec Sec	
Hone of Binards Versilia Co. or	New Action Office" : Phone Schert Action Office	
FOLL - Kyrperst - (* Old Ser 🕴	Comments*	100
Request Information		
Andre Users-		
Sat Warlood. Sterio	Options	1
Altro sensito-	Generate rew Renovel Number	any that Request
Reposit for Governmin (1/1)	Assign Request	
Add/asset/2/www.commune()	Spell-Eheck Save Earcel	
Ford Miley	Note. Fields are mandatory	-

- 4. Go back to Folder No. 5 of the EFM and select the email checked as complete previously in step 4.
- 5. Select **Reply All** and cc: the person assigned as the primary to the request in FOIAXpress, if they are not already addressed. Copy and paste the template response language, make the appropriate changes and **Send**, example:

Good Morning,

We have completed interim process and close actions for request 19-01973-F. FPL Notification: S. Lee, documents located. The specified folder has been added to the Review Log.

ED FOIA MANAGER (DeShawn)

- 6. Move the checked email from Folder No. 5 to Folder No. 7 (Process and Close Completed).
- Go to the EFM Inbox for the reply email just sent. Mark the email as Read, check as Complete, drag a copy to your Desktop, and move the email from the inbox to Folder No. 7.

14.4Moving Emails from Desktop to FOIAXpress

1. In FOIAXpress go to Correspondence and select Receive Correspondence. Leave the Letter Template dropdown set to other, for the Subject dropdown type in either Request to Close or Interim Request to Close, preceded by the appropriate office, example: OCR Interim Request to Close.

FOIA - Request: 20-01696-F 💔	Remaining Days: 14	Status: Documents Add	ded to Review Log	
Request Information	Send Correspondence	Receive Correspondence	Correspondence Log	
A Academ	-	Attachments added from or	line request submission cannot be	overridden.
Assign Users	Receive Correspondence			
Set Perfect Status		Letter Template*: Other		-
Correspondence	1	Subject*:		
	and the second sec	Received Mode:		
Request for Documents (1/1)			neg one prop conc	
Add/Search/View Documents (5/0)			Scan File	
Fees /Pilling			Attach File	
Fees/Billing				
Fees/Billing Final Actions				
				Sav

- 2. In the **Received Mode** dropdown select **Email** and drag the email that was moved to your desktop during step 16 to the Drag and Drop Zone. Hit save and ok.
- 3. Remain in **Correspondence** and the selected tab of **Receive Correspondence**. Leave the **Letter Template** dropdown set to **Other**, for the **Subject** dropdown type **Action Complete** or **Interim Action Complete**, preceded by the appropriate office, example: **OCR Interim Action Complete**. In the Received Mode dropdown select Email and drag the email that was sent in reply to the program office, and moved to your desktop in step 11, from the desktop to the **Drag and Drop Zone**. Hit save and ok.

FOIA - Request: 20-01696-F 📲	Romaining Days: 14	Status: Documents Ad	Ided to Review Log		NENT >
Request Information	Send Correspondence	Receive Correspondence	Correspondence Log		
Assign Users	No. of Concession, Name	Attachments added from o	nline request submission car	not be overridden.	
Sel Perfect Status	Receive Correspondence	Letter Template*: Other			1
and a sub-result of the second second	4	Subject*:			
Correspondence		Received Mode:		-	
Request for Documents (1/1)					
Add/Search/View Documents (5/0)			Scan File		
Fees/Billing			Attach File		1
Final Actions					
Deliver Documents					
					Silve

4. In the Received Mode dropdown select Email and drag the email that was sent in reply to the program office, and moved to your desktop in step 7, from the desktop to the **Drag and Drop Zone**. Hit save and ok.

15. Uploading a FOIA Intake Sheet to SharePoint

1. Go to the SharePoint OCIO page,

https://usdedeop.sharepoint.com/teams/OCIO/SitePages/Home.aspx and select FOIA_Operations and select FOIA REQUESTS.

iii SharePoint				< 0 @	- 7 M
OCIC: Liffice al the Enter Information	Diffice of the Chief Info	ormation Officer		🛠 Nat following	🔄 Share
Q Search	+ New 🕆 🕆 Upload 🗸 🖉 C	Quick edit 🖻 Share 🛸 Copy link 🧟 Sync	± Download	🗢 All Documents 🕤 🍸	0. 0
Home	FOIA_Operations > FOI/	A REQUESTS			
Documents	D Name	Modified	Modified By	Add column	
AT_Shared	FY 20	October 2, 2019	Middleton, Desnawn (Con		
FOIA Operations	FYDB	May 9, 2018	Smith, Michelle (Contract);		
	FY09	May 8, 2018	MigrationSvicAcct9		
OCIO					

- 2. Click +New and select Folder in the dropdown to create a new folder. Create the folder name using the case number that was assigned by FOIAXpress, (ex. 20-01273-F).
- 3. Select the newly created folder and upload the appropriate approved intake sheet.
- 4. Drag and drop the newly created folder into appropriate fiscal year folder, ex. FY20

SharePoint								4	۵	1	.5	MD
OCID- Office of the Chief			e Chief Infor	mation Offic	er			ir No	t follow	ing	년 5I	tare
Search		+ New -	🕅 Upload 🕣 🥜 Quic	k edit 🕼 Share 🍝	Copy link 📑 Sync	5 Download	= All D	ocumen	nts ~	Y	U	1
Home EDU_Deliverables	î	FOIA_Ope	erations 3 FOIA F	REQUESTS > FY	20							-
Documents		D	Name		Modified V	Modified By ~	- Add column					
AT_Shared			20-00002-PA		October 2, 2019	Middlintsin, Deshawn (Con						
FOIA_Operations			20-00003-CA		December 4, 2019	Williams: Canisha (Contrac						
ocio			20-00004-F		Navember 8, 2019	Phillips, Elaine (Contractor						
OCIO_DST			20-00005-F-PA		October 21, 2019	Middleton: Deshawn (Con						
TEMP1		1 1	20-00005-PA	6	October 27, 2019	Caliguiran, Arthur						

Purpose

This document explains the process involved with creating the FOIA Daily and Weekly Report, report through the use of FOIAXpress.

Report Schedule

Daily:

The Daily Report is generated everyday for the previous date. If you are submitting the report on Monday, then you will use the previous Friday's date.

Weekly:

The weekly report is generated on Friday, which is the day after the end of the reporting period, with distribution occurring on Friday morning. For example, with a reporting period of 8/14/20 - 8/20/20, the weekly report will be generated on Friday, 8/21/2020 (Reporting period is the previous Friday thru the following Thursday.) The FOIA Weekly Report is distributed with the daily report every Friday.

Daily Report Step by Step Process

- 1. Access the software: http://foiaxpress.ed.gov
- 2. Sign-in using your FX account.
- 3. Select the Reports tab then Requests.



*Prior to selecting the saved report criteria, the criteria must be set and saved as Daily/Weekly Report for FCS) Your template with criteria should look like below:

Report Header Display	yopuons			Include Search Criteria	in Generated Report P)
Display on all pages		Display on 1st page	🕒 Do nót đị	play on any pages	_
Select Options					
Group By =	-	Sort By -	Sort Order	Ascending	
Search Criteria					
Request #	· .		Action Office :		
Request Type :	Consultation: FOIA: FOIA: FA	*	Request Status : Air		.*
Requester		🔲 🔚 📻 Include On Behalf Of			
Description	*		100.0		
Burneline Burling I W	0				
- Requests Assigned T			Hand Weights of Land		1
Action Office (User)	Alt		User Group		

Any of the selected codes

The following select fields should be moved to selected fields in this order:

- Assigned Date
- Request ID
- Received Date
- Requester Category
- Requester Name
- Organization
- Request Description
- Primary User
- Action Office
- Multiple Offices
- Comments
- Expedite Requested
- Fee Waiver Requested

Once all the select fields are moved to the selected fields box, click save report criteria located at the top of the page. You should name it **Daily/Weekly Report for FSC**.

4. Select Daily/Weekly Report for FCS > Click NEXT



5. Change the **Received Between** dates to the current reporting period.

Request Date Options					
Requested between	4.0	•		0	Current Day.
Received between	¢	 4/2/2020 	4/2/2020	0	Currant Day
Original Closed between	;	۰		0	Current Day
Closed between	ą	•		0	Correct Day
Request Age*	;	= 🔹 in Days			
Remaining	1	= 🔹 in Days	O As of	10/03	3/2018 🔳 🖲 Default to today's

*For the Weekly Report the reporting period is the previous Friday thru the following Thursday

6. The report criteria is now set > scroll to top of page > select Generate

Gemerate Since Report Criteria Refresh	Clear Spell Check Back Cline	
Report Header Display Options		Include Search Criteria in Generated Report Print
Display on all pages	Display on 1st page	Do not display on any pages

- 7. Select Export > Select Save As > Save to Desktop
- Once saved to your desktop, open the saved report from your desktop > Select <u>Yes</u> when the Microsoft Excel popup message appears

Microsoft Excel				×
The file format and extension of 'Require want to open it anyway?	ests%20Report.xls' don't m	atch. The file cou	Ild be corrupted or unsafe. Unless you t	rust its source, don't open it. Do you
		No	the second se	

- 9. At this point, the spreadsheet needs to be formatted in preparation for distribution. Previous reports can be used for reference or copied/pasted from for the items listed below:
 - Insert Legend that defines "Not ED Records" requests are highlighted in blue, <u>United</u>
 (b)(5)
 - Report heading and ED log should be centered.
 - Number of "Not ED Records" requests listed under heading.
 - Copy and paste information from saved FX report to spreadsheet template.
 - o Remove Hyperlinks.
 - Format for top and left justify. (You will have to select each twice)
 - Select all borders.
 - Change font to Verdana and 11.

	Cases Highlights Cases Highlights		Legend: for Einforceric USC 000 pitrim							
				Cases That Do	48 Requests receive	FSC Weekly Report of between 07/29/2016 and 08/04/ t of Education Records are Highlig		a)		
Assigned Date	Request ID	Received Date	Requester Category	Requester Name	Organization	Request Description	Primary User	Action Office	Comments	Expedite Requested

10. You will notice the report has PAL requests which are identified by Queue, PAL Incoming Requests. These requests need to be assigned to the appropriate office and an analyst. You should place comments of what office you think the office the request should be assigned to and highlight it in red like below. (this step is similar to the Intake process and only pertains to the Daily Report) Remove an requests that were not entered the day the report is being made for.

Explored for 1004 and was approve for 0 10,2000, However, Fedioans is showing that I have \$4 savinents with Wet all have been counted. I would live to have an accurate count	Transming Requests	Sec.	Shoutt be es; c bi needed
Al Employment Certification Forms submitted to DAE in connection with the Public Service Loan Pargiveness program containing a feedbar entity as the employer interneet information may be extlacted, specifically including: Meditar Nedical Group II. Heddlar feedbar Group Anachteoropy, Meditar Nedical Group II. Heddlar Medical Group Reducings, Meditar Medical Group II. Heddlar Medical Group Reducings, Meditar Medical Group II. Heddlar Medical Group Reducings, Meditar Medical Group II. Heddlar Medical Group Reducings, Medical Group Scottern Sector Group Reducing Carls Termers, and Georgerevic Physicians Group (Date Range for Record Sector). From div 31/2018 To 54: 31/2020 (QUELE, PHL Incoming Tequests	Ever - Ser	Woolid PEA wave mis who analyst needed

11. Once you have added all Intake comments, you should send an email to Greg and copy Art, Bobby, Sandy, Tiffany, DeShawn and Elise with the following:

Good Morning,

Please find attached the draft daily report for MM/DD/YYYY. There are (enter number of requests that need to be reassigned here) requests that require reassignment. I have highlighted them in red and left comments in the comments section. Thanks.

- 12. Once you get a response to the draft daily report email, you will follow Intake procedures to assign the PAL/National Portal requests. After assignments are complete run the daily report again and follow step 9 to format the report for distribution.
 - 13. The report is distributed in two file formats: 1) Excel spreadsheet; and 2) PDF so the Excel spreadsheet should be saved as a PDF file once reviewed and approved for release. Be sure to insert page numbers on the PDF version. A final email with the Excel spreadsheet and PDF version should be sent to Greg and copy Art, Bobby, Deborah, Tiffany, DeShawn, Sandra and Elise.

Please find attached the Daily Report for MM/DD/YYYY.

Weekly Report Step by Step Process

- 1. Follow steps 1-8 to generate the Weekly Report. *PLEASE NOTE STEP 5 WILL REQUIRE A DATE CHANGE TO REFLECT THE PREVIOUS FRIDAY TO THE CURRENT THURSDAY*
- 2. At this point, the spreadsheet needs to be formatted in preparation for distribution. Previous reports can be used for reference or copied/pasted from for the items listed below:
 - Insert Legend that defines "Not ED Records" requests are highlighted in blue, (5).
 (b)(5)
 - Report heading and ED log should be centered.
 - Number of "Not ED Records" requests listed under heading.
 - Copy and paste information from saved FX report to spreadsheet template.
 - Remove Hyperlinks.
 - Format for top and left justify. (You will have to select each twice)
 - Select all borders.
 - Change font to Verdana and 11.
 - o Remove any requests that were not entered the week the report is being made for.

*ANY REQUESTS THAT ARE IN QUE, PAL INCOMING REQUESTS (ON HOLD FOR CLARIFICATION/COI REQUESTS) SHOULD BE REMOVED FROM THE FINAL REPORT BEFORE DISTRIBUTION.

Case Hydrighted in Blass - Not El Sacción Case Hydrighted in Vellow - CCC CCC.Reve								
				Cases Thai Bo	48 Requests receive	FSC Weekly Report Id between 07/29/2016 and 08/04/ Fof Education Records are Highlig	sj	

 Once the spreadsheet is formatted save a copy as a PDF and send both formats via email for Distribution. You will send the Daily and Weekly Report together on Fridays. A final email with the Excel spreadsheet and PDF version should be sent Greg and copy Art, Bobby, Deborah, Tiffany, DeShawn, Sandra and Elise.

Please find attached the Weekly Report for MM/DD/YYYY thru MM/DD/YYYY.