

User Guide

Agency Public Records Request Database

What is the Agency Public Records Request Database?

Effective January 1, 2017, all Massachusetts agencies are required to publish summaries of requests for public records. The Agency Public Records Request Database website provides agencies with a toll to create online user accounts and post the required documents.

The public records request information that is recorded by agencies will be reported annually to the legislature by the Public Records Division. In addition, all public records requests will be made available for viewing by the general public from the Secretary of the Commonwealth's website.

Each Agency designates an individual as the primary Records Access Officer (RAO). Once approved, the primary RAO can create multiple accounts for additional users within the agency. Only users with an account can use the online system to enter request details.

This user guide covers the following topics:

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Page 04	Signing into the website
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Page 12	Update your user account (signed-in as a Secondary RAO)
Page 14	Create a Public Records request detail record
Page 18	Search, view, edit Public Records request detail records
Page 22	Change password
Page 24	Forget user name or password
Page 26	Upload request detail tracked outside of the system (bulk upload)

Getting started...

What you need to know about the online Agency Public Records Request Database website.

User account types

To access the website, agency RAOs must have an account created through the website. Once you create an account, you gain access to a secure area that provides the specific links you need to manage your account.

There are two types of agency user accounts, they are "Primary RAOs" and all other RAOs (also called "Secondary RAOs").

User accounts have a unique user name and email address

Primary RAO user account

Each agency will designate one RAO to be the "Primary RAO" and be responsible for creating additional agency RAO user accounts. A Primary RAO can

- Request Primary RAO user account approval from the Public Records Division
- Create as many agency RAO user accounts ("Secondary RAO" user accounts) as needed once approved by the Public Records Division
- Secondary RAO user accounts do not require approval by the Public Records Division
- RAO can activate or inactivate Secondary RAO user accounts

Only one Primary RAO user account per agency

When creating a Primary RAO account, contact the Public Records Division if you don't receive your sign-in credentials within 5 days

All RAO user accounts

Each agency RAO can sign into the Agency Public Records Request Database website and use the Main Menu to:

- Create and update public record request summaries
- Search for public record request summaries
- Edit your user account (email and phone number only)
- Change your password

Email communication

The email address information entered for each user account is preserved in the website and used to communicate messages including user account sign-in credentials, user creation acknowledgements, and forgotten user names and passwords.

Be sure your email is accurate!

If you have any questions about email addresses, or you think you are not receiving email notifications, contact the Public Records Division at 617-727-2832 for assistance.

User names and passwords

Your account is secure and can only be accessed by your user name and password.

User name

- Use a combination of 6 to 20 letters **and** numbers
- **Start** with a letter
- Do **not** use your email address as your user name

User names **are not** case sensitive

Password

- Use a minimum of 8 characters
- Use a letters, numbers, and special characters
- Use at least 1 number, 1 lower case letter, and 1 capital case letter

Passwords **are** case sensitive

More on passwords

- A system-generated password will be sent to your email address. When you receive your system-generated password, change it by selecting the change password link (found at the top of most screens).
- Your user name and password are saved by the system. If you cannot locate your user name or password, select the links on the sign-in screen to obtain your recent credentials.

Signing into the website

On the sign-in screen, enter your **user name** and **password** and select **Sign in**. The Main Menu will display along with your user name.

- If you cannot access the Main Menu, a password conflict may be the cause
- Use the password links to retrieve your user name or password
- If this doesn't help and repeated attempts to sign in fail, contact the Public Records Division at 617-727-2832
- Alternatively, email the Public Records Division at RAOManagerAdmin@sec.state.ma.us

If you experience difficulty signing into your account, **do not create another account.**

Contact the Public Records Division for assistance.

Agency Public Records Request Database Website URL:

<https://www.sec.state.ma.us/AgencyRAOWeb/RAOAccounts/Welcome.aspx>

Create a Primary RAO user account

Step 1: Select **Sign in or Create an Account** from the main sign-in screen

The screenshot shows the homepage of the Public Records Division website. The header features a portrait of William Francis Galvin, Secretary of the Commonwealth of Massachusetts, and the state seal. A navigation bar includes links for HOME, DIRECTIONS, and CONTACT US, along with a search bar. A left sidebar lists various services like Citizen Information Service, Commonwealth Museum, Corporations, Elections and Voting, Lobbyist, Archives, Massachusetts Historical Commission, Public Records, Publications and Regulations / Bookstore, Registry of Deeds, Securities, State House Tours, Records Center, Regional Offices, and Address Confidentiality Program (ACP). The main content area is titled 'Public Records Division' and 'Agency Public Records Request Database'. It includes a 'Welcome' message and a list of tasks for the Primary RAO account holder. The 'Sign In or Create an Account' button is circled in red.

Public Records Division

Agency Public Records Request Database

Welcome

Each agency has a designated primary Records Access Officer (RAO); the Public Records Law and its Access Regulations requires that the RAO of each agency set up a master account with the Public Records Division.

Once your master agency RAO account is approved, you can sign in to this system and perform several tasks:

- Set up additional RAO accounts for your agency. As the agency's Primary RAO account holder, you may set up as many accounts as you need for your agency
- You will approve and manage your agency's RAO accounts; these do not require approval by the Public Records Division
- Create and submit a summary for each Public Records Request submitted to your agency
- Search for and modify submitted Public Records Request summaries

[FAQs](#) [Sign In or Create an Account](#)

If you need any technical assistance using this website contact,
RAOManagerAdmin@sec.state.ma.us

Step 2: Select **Create RAO Account**

The screenshot shows the 'Sign in' page of the Public Records Division website. The header and navigation bar are identical to the previous screenshot. The left sidebar is also identical. The main content area is titled 'Public Records Division' and 'Agency Public Records Request Database'. It includes a 'Sign in' section with a message about signing in with a user name and password. Below the message are input fields for 'User name:' and 'Password:', followed by 'Sign in' and 'Create RAO Account' buttons. The 'Create RAO Account' button is circled in red. There is also a link for 'Forgot your user name or password?'.

Public Records Division

Agency Public Records Request Database

Sign in

Sign in with your user name and password. If you have not yet set up a Primary RAO account for your agency, select the button below to get started.

User name:

Password:

[Sign in](#) [Create RAO Account](#)

[Forgot your user name or password?](#)

Each agency is required to create ONE Primary RAO user account with the Public Records Division; subsequently, Primary RAO users may choose to add Secondary RAO user accounts for their agency.

If you need any technical assistance using this website, contact
RAOManagerAdmin@sec.state.ma.us

Step 3: Enter your user account information and select **Review information**

The screenshot shows the 'Step 1: Enter RAO information' form. At the top, there is a header with a photo of William Francis Galvin, Secretary of the Commonwealth of Massachusetts, and the state seal. Below the header is a navigation bar with links for HOME, DIRECTIONS, and CONTACT US, and a search bar. The main heading is 'Public Records Division'. The form title is 'Agency Public Records Request Database' and the subtitle is 'RAO Account - Step 1: Enter RAO information'. The instructions state: 'Start by completing the following information: **All fields are required unless otherwise stated'. The form fields are: First name, Middle name (optional), Last name, Job title (optional), Create a user name, Email address, Business phone, Extension (optional), Agency name (a dropdown menu showing 'Select Agency'), Agency street address 1, Agency street address 2, Agency city or town, Agency state (a dropdown menu showing 'Massachusetts'), and Agency zip code. At the bottom of the form are three buttons: 'Clear fields', 'Review information', and 'Cancel'.

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Secretary of the Commonwealth of Massachusetts

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Public Records Division

Agency Public Records Request Database

RAO Account - Step 1: Enter RAO information

Start by completing the following information:
**All fields are required unless otherwise stated

First name:

Middle name: (optional)

Last name:

Job title: (optional)

Create a user name:

Email address:

Business phone: Extension: (optional)

Agency name:

Agency street address 1:

Agency street address 2:

Agency city or town:

Agency state:

Agency zip code:

Step 4: Review your user account information and select **Submit**

The screenshot shows the 'Step 2: Review Information' form. At the top, there is a header with a photo of William Francis Galvin, Secretary of the Commonwealth of Massachusetts, and the state seal. Below the header is a navigation bar with links for HOME, DIRECTIONS, and CONTACT US, and a search bar. The main heading is 'Public Records Division'. The form title is 'Agency Public Records Request Database' and the subtitle is 'RAO Account - Step 2: Review Information'. The instructions state: 'Review your account information and make edits if needed. When complete, select the Submit button.' The form fields are: Status (New), RAO name (Don Benson), Job title (Project Manager), Email address (dbenson@sec.state.ma.us), Business phone (617-888-3838), User name (dbenson), Agency name (Bunker Hill Community College), and Agency address (250 New Rutherford Avenue, Room B316, Boston, MA 02129). At the bottom of the form are two buttons: 'Make corrections' and 'Submit'.

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Public Records Division

Agency Public Records Request Database

RAO Account - Step 2: Review Information

Review your account information and make edits if needed. When complete, select the Submit button.

Status: New

RAO name: Don Benson

Job title: Project Manager

Email address: dbenson@sec.state.ma.us

Business phone: 617-888-3838

User name: dbenson

Agency name: Bunker Hill Community College

Agency address: 250 New Rutherford Avenue, Room B316, Boston, MA 02129

Step 5: The approval of your account is pending review by the Public Records Division.
(Note: This may take up to five business days.) Select **Back to the main menu**.



The screenshot shows the official website of the Commonwealth of Massachusetts, specifically the Public Records Division. The header features a portrait of William Francis Galvin, Secretary of the Commonwealth, and the state seal. Below the header, there is a navigation bar with links for HOME, DIRECTIONS, and CONTACT US, along with a search bar. The main content area is titled "Public Records Division" and "Agency Public Records Request Database". The current page is "RAO Account - Step 3: Pending Approval". It contains a message stating that the account approval is pending review by the Public Records Division, with an expected response within 5 business days. It also provides instructions for the agency to notify the division of a new primary RAO user and offers contact information for assistance. A table displays account details: Record number (2016000012), Status (Pending), Date submitted (12/22/2016), RAO name (Jennifer Rogers), User name (JRogers), and Agency name (Bunker Hill Community College). At the bottom, there are two buttons: "Back to main menu" and "Print copy for your records".

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Public Records Division

Agency Public Records Request Database

RAO Account - Step 3: Pending Approval

The approval of your account is pending the review of the Public Records Division.

You can expect a response within 5 business days from the time of submission. When approved, a temporary password will be emailed to the address on this form; you must change your password the first time you sign in to the Public Records Website.

The agency must notify the Public Records Division immediately if it designates a new agency Primary RAO user.

Additional instructions for signing in will be included in this email.

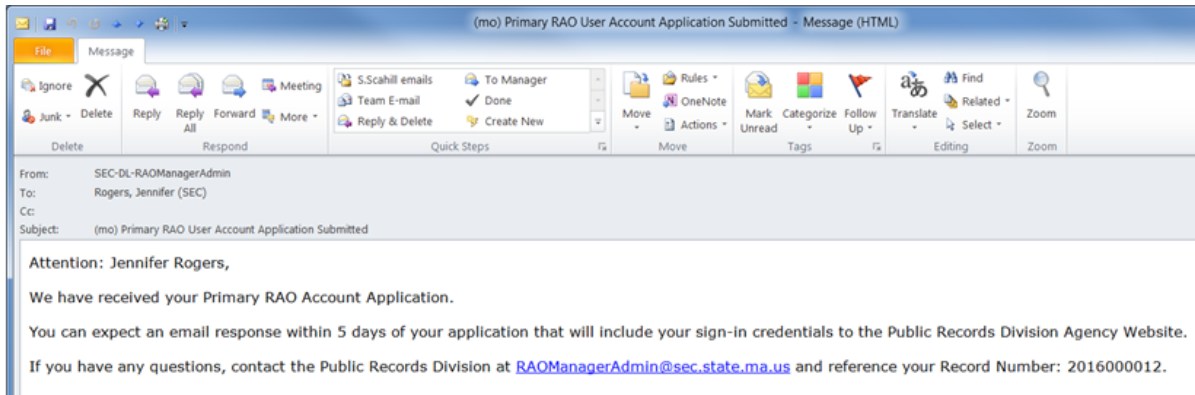
Once your account is activated, you can set up accounts for additional staff members within your agency. These accounts do not require review and approval by the Public Records Division.

If you have any questions about your account, or the process, please contact RAOManagerAdmin@sec.state.ma.us for assistance. You will need to reference your record number when contacting the division.

Record number:	2016000012
Status:	Pending
Date submitted:	12/22/2016
RAO name:	Jennifer Rogers
User name:	JRogers
Agency name:	Bunker Hill Community College

[Back to main menu](#) [Print copy for your records](#)

Step 6: You'll receive a **confirmation of receipt** at your email address



The screenshot shows an email interface with a toolbar at the top containing various actions like Ignore, Delete, Reply, Forward, Meeting, etc. The email header shows it is from SEC-DL-RAOManagerAdmin to Rogers, Jennifer (SEC), with the subject "(mo) Primary RAO User Account Application Submitted". The body of the email is addressed to Jennifer Rogers and confirms the receipt of her Primary RAO Account Application. It states that she can expect an email response within 5 days containing sign-in credentials. It also provides contact information for the Public Records Division at RAOManagerAdmin@sec.state.ma.us and references the Record Number: 2016000012.

(mo) Primary RAO User Account Application Submitted - Message (HTML)

From: SEC-DL-RAOManagerAdmin
To: Rogers, Jennifer (SEC)
Cc:
Subject: (mo) Primary RAO User Account Application Submitted

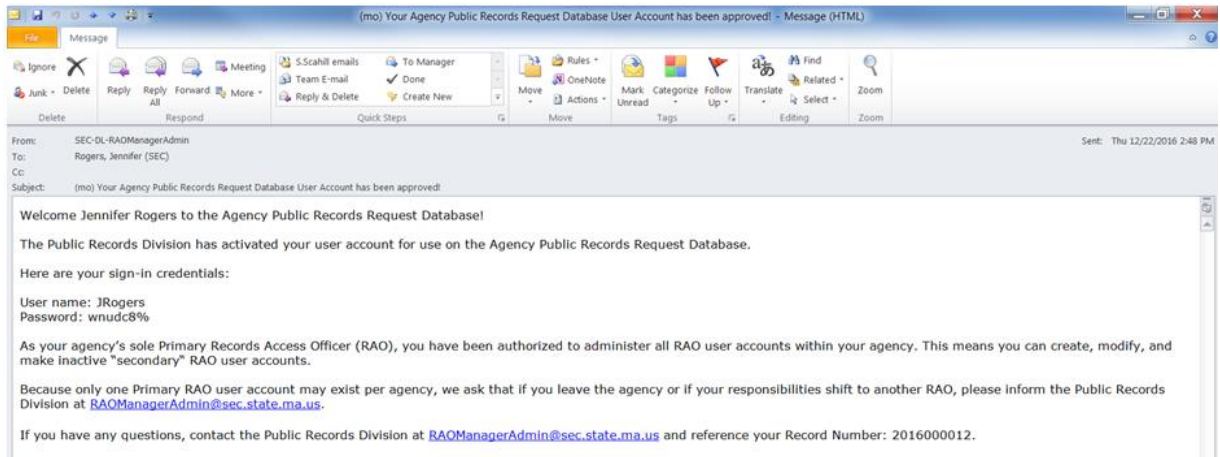
Attention: Jennifer Rogers,

We have received your Primary RAO Account Application.

You can expect an email response within 5 days of your application that will include your sign-in credentials to the Public Records Division Agency Website.

If you have any questions, contact the Public Records Division at RAOManagerAdmin@sec.state.ma.us and reference your Record Number: 2016000012.

Step 7: After the Public Records Division approves your account, you'll receive an approval confirmation with your sign-in credentials. (Note: This is a temporary password. Use it to sign-in for the first time. Use the **Change password** link at the top of the page to make the change.)



Create a Secondary RAO user account

Step 1: Select **Sign in or Create an Account** from the main sign-in screen

The screenshot shows the homepage of the Public Records Division. At the top, there is a header with a photo of William Francis Galvin, Secretary of the Commonwealth of Massachusetts, and the state seal. Below the header is a navigation bar with links for HOME, DIRECTIONS, and CONTACT US, along with a search bar. A left sidebar lists various services like Citizen Information Service, Commonwealth Museum, Corporations, Elections and Voting, Lobbyist, Archives, Massachusetts Historical Commission, Public Records, Publications and Regulations / Bookstore, Registry of Deeds, Securities, State House Tours, Records Center, Regional Offices, and Address Confidentiality Program (ACP). The main content area is titled 'Public Records Division' and 'Agency Public Records Request Database'. It includes a 'Welcome' message and a list of tasks for RAO account holders. At the bottom of this section, there are two buttons: 'FAQs' and 'Sign In or Create an Account', with the latter circled in red. Below the buttons, there is contact information for technical assistance.

Public Records Division

Agency Public Records Request Database

Welcome

Each agency has a designated primary Records Access Officer (RAO); the Public Records Law and its Access Regulations requires that the RAO of each agency set up a master account with the Public Records Division.

Once your master agency RAO account is approved, you can sign in to this system and perform several tasks:

- Set up additional RAO accounts for your agency. As the agency's Primary RAO account holder, you may set up as many accounts as you need for your agency
- You will approve and manage your agency's RAO accounts; these do not require approval by the Public Records Division
- Create and submit a summary for each Public Records Request submitted to your agency
- Search for and modify submitted Public Records Request summaries

[FAQs](#) [Sign In or Create an Account](#)

If you need any technical assistance using this website contact,
RAOManagerAdmin@sec.state.ma.us

Step 2: Enter your user name and password

This screenshot shows the 'Sign in' page of the Public Records Division. The layout is similar to the previous one, but the main content area is titled 'Sign in'. It instructs users to sign in with their user name and password. Below the text, there are two input fields: 'User name:' and 'Password:', both of which are circled in red. Below these fields are buttons for 'Sign in' and 'Create RAO Account'. A link for 'Forgot your user name or password?' is also present. At the bottom, there is a note about the requirement for a Primary RAO account and contact information for technical assistance.

Public Records Division

Agency Public Records Request Database

Sign in

Sign in with your user name and password. If you have not yet set up a Primary RAO account for your agency, select the button below to [get started](#).

User name:

Password:

[Sign in](#)

[Create RAO Account](#)

[Forgot your user name or password?](#)

Each agency is required to create ONE Primary RAO user account with the Public Records Division; subsequently, Primary RAO users may choose to add Secondary RAO user accounts for their agency.

If you need any technical assistance using this website, contact
RAOManagerAdmin@sec.state.ma.us

Step 3: Select **Add or update agency RAO accounts**

The screenshot shows the top of the Public Records Division website. The header includes a photo of William Francis Galvin, Secretary of the Commonwealth of Massachusetts, and the state seal. Below the header is a navigation bar with links for HOME, DIRECTIONS, and CONTACT US, along with a search bar. The user 'Bonnie' is signed in, with links for 'Change password' and 'Sign out'. The main heading is 'Public Records Division'. Below this is the 'Agency Public Records Request Database' section, which contains a 'Main Menu' with several links. The link 'Add or update agency RAO accounts' is circled in red.

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Bonnie is signed in [Change password](#) [Sign out](#)

Public Records Division

Agency Public Records Request Database

Main Menu

- [Search for Public Records request detail records](#)
- [Add a new Public Records request detail record](#)
- [Add or update agency RAO accounts](#)
- [Update my account information](#)
- [Upload request detail tracked outside of the system](#)

Step 4: Select **Add new Secondary RAO**. (Note: Secondary RAOs do not require approval by the Public Records Division. The Primary RAO can set up as many Secondary RAO accounts as needed. The Primary RAO can also activate or inactivate Secondary RAO accounts.)

The screenshot shows the 'RAO Account Management' section of the Public Records Division website. It displays the 'Primary RAO Account' information in a table. Below the table, there are two buttons: 'Add new Secondary RAO' and 'Back to Main Menu'. The 'Add new Secondary RAO' button is circled in red. The 'Secondary RAO Account(s)' count is shown as 0.

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JRogers is signed in [Main menu](#) [Change password](#) [Sign out](#)

Public Records Division

Agency Public Records Request Database

RAO Account Management

Primary RAO Account:

Name	Email address	Phone/Ext	Date created	Status	Record
Jennifer Rogers	Jennifer.Rogers@sec.state.ma.us	617-345-6789	12/22/2016	Active	Edit

[Add new Secondary RAO](#) [Back to Main Menu](#)

Secondary RAO Account(s): 0

Step 5: Enter Secondary RAO user account information and select **Save and Continue**



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JRogers is signed in [Main menu](#) [Change password](#) [Sign out](#)

Public Records Division

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RAO Account Management - New

Status: ☒ Active ☐ Inactive

First name:

Middle name: (optional)

Last name:

Title: (optional)

Create a user name:

Email address:

Phone:

Extension: (optional)

Agency name:

Agency street address 1:

Agency street address 2: (optional)

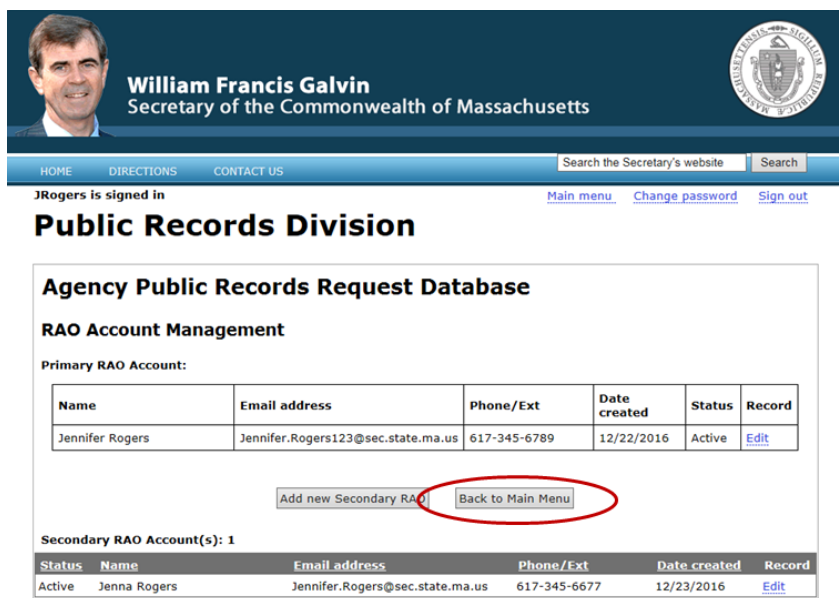
Agency city or town:

Agency state:

Agency zip code:

[Save and Continue](#) [Cancel](#) [Clear](#)

Step 6: New Secondary RAO account is displayed, select **Back to Main Menu**



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JRogers is signed in [Main menu](#) [Change password](#) [Sign out](#)

Public Records Division

Agency Public Records Request Database

RAO Account Management

Primary RAO Account:

Name	Email address	Phone/Ext	Date created	Status	Record
Jennifer Rogers	Jennifer.Rogers123@sec.state.ma.us	617-345-6789	12/22/2016	Active	Edit

[Add new Secondary RAO](#) [Back to Main Menu](#)

Secondary RAO Account(s): 1

Status	Name	Email address	Phone/Ext	Date created	Record
Active	Jenna Rogers	Jennifer.Rogers@sec.state.ma.us	617-345-6677	12/23/2016	Edit

Update your user account (signed in as a Secondary RAO)

Step 1: Select **Sign in or Create an Account** from the main sign-in screen

The screenshot shows the homepage of the Public Records Division. At the top, there is a header with a photo of William Francis Galvin, Secretary of the Commonwealth of Massachusetts, and the state seal. Below the header is a navigation bar with links for HOME, DIRECTIONS, and CONTACT US, along with a search bar. A left sidebar lists various services like Citizen Information Service, Commonwealth Museum, Corporations, Elections and Voting, Lobbyist, Archives, Massachusetts Historical Commission, Public Records, Publications and Regulations / Bookstore, Registry of Deeds, Securities, State House Tours, Records Center, Regional Offices, and Address Confidentiality Program (ACP). The main content area is titled 'Public Records Division' and 'Agency Public Records Request Database'. It includes a 'Welcome' message and a list of tasks: setting up additional RAO accounts, approving and managing RAO accounts, creating and submitting summaries for requests, and searching for and modifying submitted request summaries. At the bottom of this section, there are two buttons: 'FAQs' and 'Sign In or Create an Account', with the latter being circled in red. Below the buttons, there is a link for technical assistance: RAOManagerAdmin@sec.state.ma.us.

Step 2: Enter your user name and password

This screenshot shows the same homepage as the previous one, but the 'Sign in' section is expanded. It contains a 'Sign in' heading and instructions: 'Sign in with your user name and password. If you have not yet set up a Primary RAO account for your agency, select the button below to get started.' Below this, there are two input fields: 'User name:' and 'Password:', both of which are circled in red. Underneath these fields are two buttons: 'Sign in' and 'Create RAO Account'. A link for 'Forgot your user name or password?' is also present. At the bottom, there is a paragraph explaining that each agency is required to create one Primary RAO user account, and subsequently, Primary RAO users may choose to add Secondary RAO user accounts. A technical assistance contact link is provided at the very bottom: RAOManagerAdmin@sec.state.ma.us.

Step 3: Select **Update my account information**



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Bonnie is signed in [Change password](#) [Sign out](#)

Public Records Division

Agency Public Records Request Database

Main Menu

- [Search for Public Records request detail records](#)
- [Add a new Public Records request detail record](#)
- [Add or update agency RAO accounts](#)
- [Update my account information](#)
- [Upload request detail tracked outside of the system](#)

Step 4: Update user account information and select **Save and Continue**



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Jenna1 is signed in [Main menu](#) [Change password](#) [Sign out](#)

Public Records Division

Agency Public Records Request Database

Update My Account Information

Status: ☒ Active ☐ Inactive

First name:

Middle name: (optional)

Last name:

Title: (optional)

Create a user name:

Email address:

Phone:

Extension: (optional)

Agency name:

Agency street address 1:

Agency street address 2: (optional)

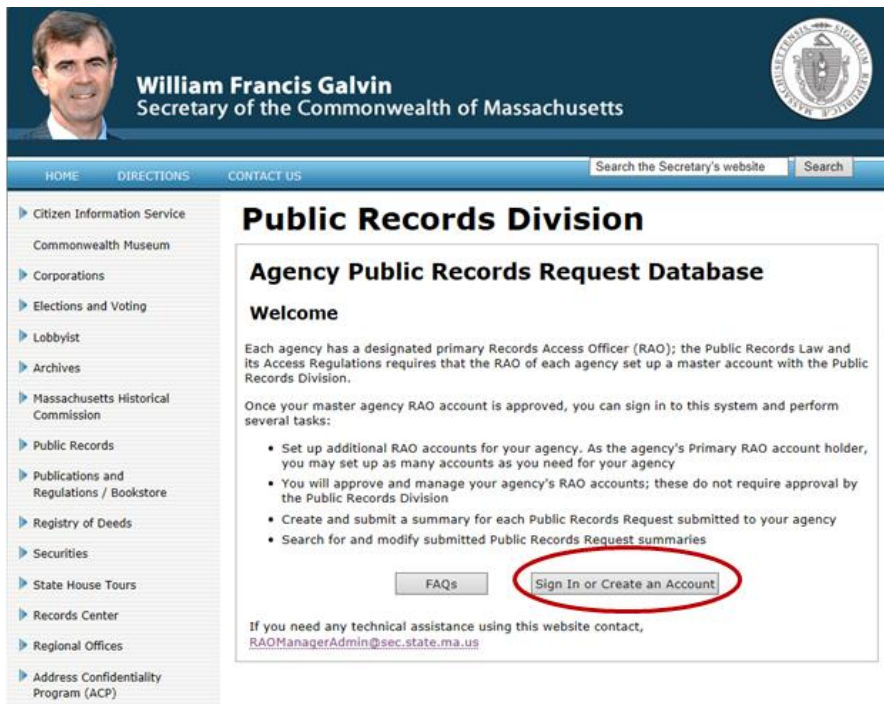
Agency city or town:

Agency state:

Agency zip code:

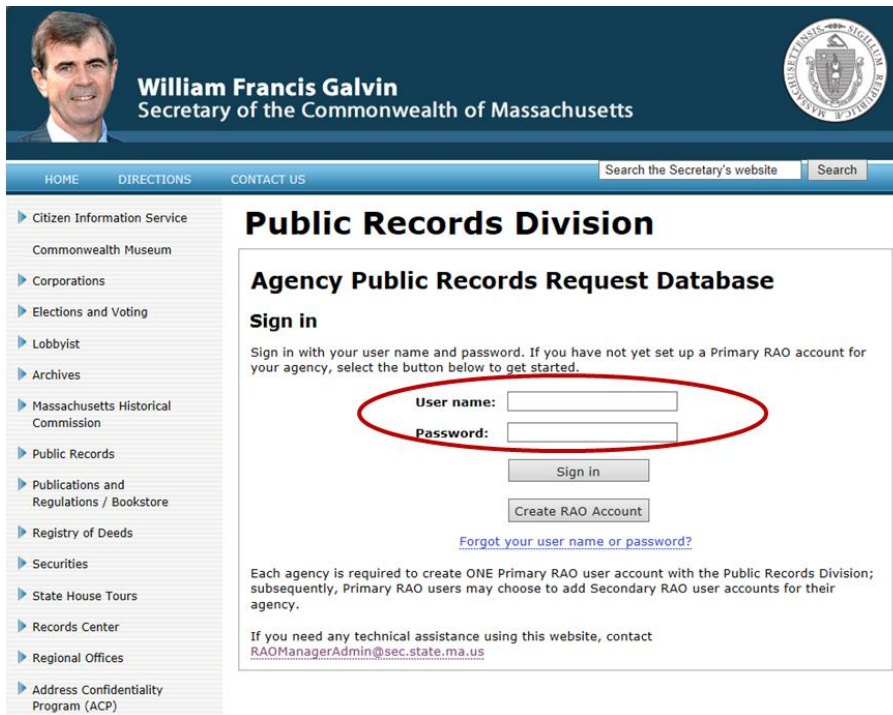
Create a Public Records request detail record

Step 1: Select **Sign in or Create an Account** from the main sign-in screen



The screenshot shows the homepage of the Public Records Division website. The header includes a photo of William Francis Galvin, Secretary of the Commonwealth of Massachusetts, and the state seal. A navigation bar contains links for HOME, DIRECTIONS, and CONTACT US, along with a search bar. A left sidebar lists various services like Citizen Information Service, Commonwealth Museum, Corporations, Elections and Voting, Lobbyist, Archives, Massachusetts Historical Commission, Public Records, Publications and Regulations / Bookstore, Registry of Deeds, Securities, State House Tours, Records Center, Regional Offices, and Address Confidentiality Program (ACP). The main content area is titled 'Public Records Division' and 'Agency Public Records Request Database'. It includes a 'Welcome' message and a list of tasks: setting up additional RAO accounts, approving and managing RAO accounts, creating and submitting summaries for requests, and searching for submitted summaries. At the bottom of this section, there are two buttons: 'FAQs' and 'Sign In or Create an Account', with the latter being circled in red. Below the buttons, there is contact information for technical assistance: 'If you need any technical assistance using this website contact, RAOManagerAdmin@sec.state.ma.us'.

Step 2: Enter user name and password



This screenshot shows the 'Sign in' page of the Public Records Division website. The layout is consistent with the previous screenshot. The main content area is titled 'Public Records Division' and 'Agency Public Records Request Database'. Below the title, it says 'Sign in' and provides instructions: 'Sign in with your user name and password. If you have not yet set up a Primary RAO account for your agency, select the button below to get started.' There are two input fields: 'User name:' and 'Password:', both of which are circled in red. Below these fields are two buttons: 'Sign in' and 'Create RAO Account'. A link for 'Forgot your user name or password?' is also present. At the bottom, there is a note: 'Each agency is required to create ONE Primary RAO user account with the Public Records Division; subsequently, Primary RAO users may choose to add Secondary RAO user accounts for their agency.' and contact information: 'If you need any technical assistance using this website, contact RAOManagerAdmin@sec.state.ma.us'.

Step 3: Select **Add new Public Records request detail record**



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Bonnie is signed in [Change password](#) [Sign out](#)

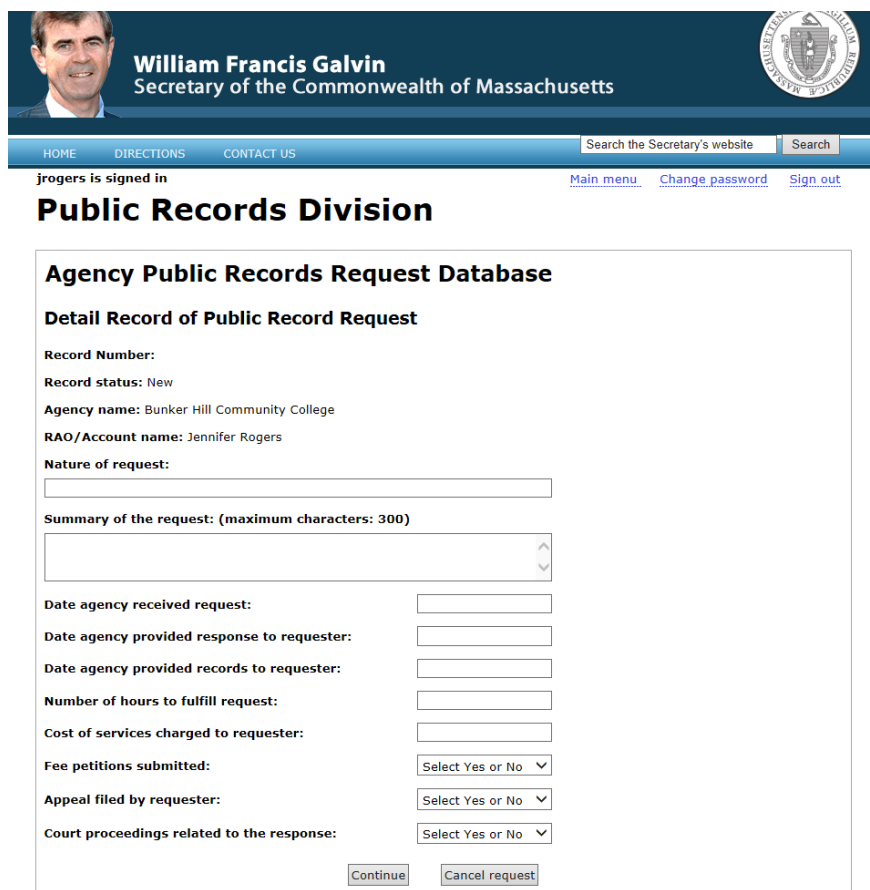
Public Records Division

Agency Public Records Request Database

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- [Search for Public Records request detail records](#)
- [Add a new Public Records request detail record](#)
- [Add or update agency public records](#)
- [Update my account information](#)
- [Upload request detail tracked outside of the system](#)

Step 4: Enter request detail information and select **Continue**



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Jrogers is signed in [Main menu](#) [Change password](#) [Sign out](#)

Public Records Division

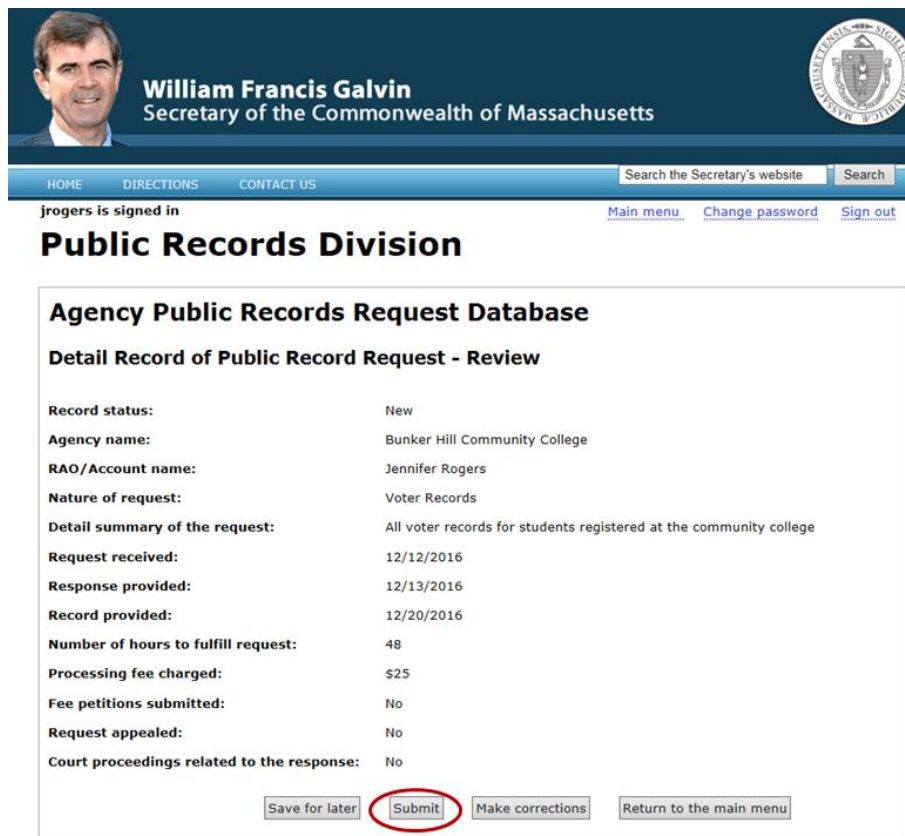
Agency Public Records Request Database

Detail Record of Public Record Request

Record Number:
Record status: New
Agency name: Bunker Hill Community College
RAO/Account name: Jennifer Rogers
Nature of request:
Summary of the request: (maximum characters: 300)
Date agency received request:
Date agency provided response to requester:
Date agency provided records to requester:
Number of hours to fulfill request:
Cost of services charged to requester:
Fee petitions submitted: Select Yes or No
Appeal filed by requester: Select Yes or No
Court proceedings related to the response: Select Yes or No

[Continue](#) [Cancel request](#)

Step 5: Review request detail information and select **Submit**



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jrogers is signed in Main menu Change password Sign out

Public Records Division

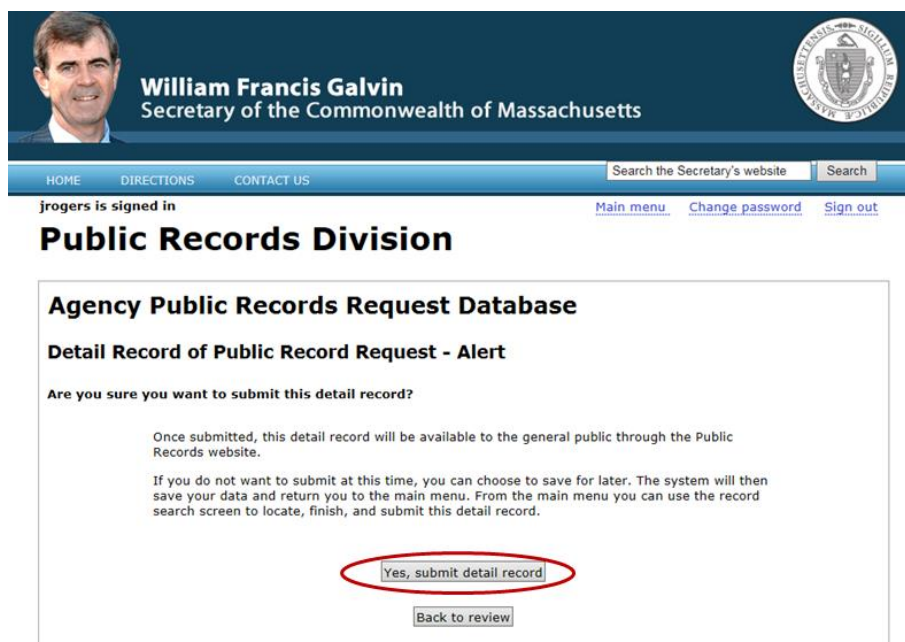
Agency Public Records Request Database

Detail Record of Public Record Request - Review

Record status:	New
Agency name:	Bunker Hill Community College
RAO/Account name:	Jennifer Rogers
Nature of request:	Voter Records
Detail summary of the request:	All voter records for students registered at the community college
Request received:	12/12/2016
Response provided:	12/13/2016
Record provided:	12/20/2016
Number of hours to fulfill request:	48
Processing fee charged:	\$25
Fee petitions submitted:	No
Request appealed:	No
Court proceedings related to the response:	No

Save for later **Submit** Make corrections Return to the main menu

Step 6: Review request detail record and select **Yes, submit detail record**



William Francis Galvin
Secretary of the Commonwealth of Massachusetts

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

jrogers is signed in Main menu Change password Sign out

Public Records Division

Agency Public Records Request Database

Detail Record of Public Record Request - Alert

Are you sure you want to submit this detail record?

Once submitted, this detail record will be available to the general public through the Public Records website.

If you do not want to submit at this time, you can choose to save for later. The system will then save your data and return you to the main menu. From the main menu you can use the record search screen to locate, finish, and submit this detail record.

Yes, submit detail record Back to review

Step 7: Review submittal confirmation and select **Back to Search**



The screenshot shows the official website of William Francis Galvin, Secretary of the Commonwealth of Massachusetts. The header includes a portrait of the Secretary, his name, and the state seal. A navigation bar contains links for HOME, DIRECTIONS, and CONTACT US, along with a search bar. Below the header, a message indicates that 'jrogers' is signed in, with links for the Main menu, Change password, and Sign out. The main content area is titled 'Public Records Division' and 'Agency Public Records Request Database'. It displays a 'Detail Record of Public Record Request - Confirmation' for record number 2016000006, which has a status of 'Submitted'. A message states that the information is submitted and available to the general public, with contact information for assistance: RAOManagerAdmin@sec.state.ma.us. A 'Back to Search' button is highlighted with a red oval.

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

jrogers is signed in [Main menu](#) [Change password](#) [Sign out](#)

Public Records Division

Agency Public Records Request Database

Detail Record of Public Record Request - Confirmation

Record number: 2016000006 Record status: Submitted

This information is submitted and is now available to the general public. If you need assistance with Public Records policy, or help using this website, contact: RAOManagerAdmin@sec.state.ma.us

[Back to Search](#)

Search, view, and edit Public Records request detail record

Step 1: Select **Search for Public Records request detail record** from the main menu



The screenshot shows the top of the Public Records Division website. The header includes a photo of William Francis Galvin, Secretary of the Commonwealth of Massachusetts, and the state seal. Below the header is a navigation bar with links for HOME, DIRECTIONS, and CONTACT US, along with a search bar. The user is logged in as Bonnie. The main menu is displayed, listing several options: Search for Public Records request detail records (highlighted with a red circle), Add a new Public Records request detail record, Add or update agency RAO accounts, Update my account information, and Upload request detail tracked outside of the system.

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

Bonnie is signed in [Change password](#) [Sign out](#)

Public Records Division

Agency Public Records Request Database

Main Menu

- [Search for Public Records request detail records](#)
- [Add a new Public Records request detail record](#)
- [Add or update agency RAO accounts](#)
- [Update my account information](#)
- [Upload request detail tracked outside of the system](#)

Step 2: Select one or more filters and select **Search**



The screenshot shows the search interface of the Public Records Division website. The header and navigation bar are the same as in the previous screenshot. The user is logged in as jrogers. The main menu is displayed, listing several options: Search for a Public Records Request Detail Record, Add a new Public Records request detail record, Add or update agency RAO accounts, Update my account information, and Upload request detail tracked outside of the system. The search form is visible, containing various filters and a search button (highlighted with a red circle).

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HOME DIRECTIONS CONTACT US Search the Secretary's website Search

jrogers is signed in [Main menu](#) [Change password](#) [Sign out](#)

Public Records Division

Agency Public Records Request Database

Search for a Public Records Request Detail Record

Agency name:

Date type:

Search by date: Date from: Date to:

RAO Account name:

Nature of request:

Appeal filed by requester: Processing fee:

Fee Petitions submitted: Request status:

Record number: Record status:

Results per page: Court proceedings related to the response:

[Search](#) [Clear Fields](#) [Return to the main menu](#)

Step 3: Search results are returned, select **Record No** to view request record details

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

J. Rogers is signed in Main menu Change password Sign out

Public Records Division

Agency Public Records Request Database

Search for a Public Records Request Detail Record

Agency name: Bunker Hill Community College

Date type: All

Search by date: Date from: Date to:

RAO Account name: All

Nature of request:

Appeal filed by requester: All Processing fee:

Fee Petitions submitted: All Request status: All

Record number: 2016000006 Record status: All

Results per page: All Court proceedings related to the response: All

Search Clear Fields Return to the main menu

Records found: 1 Print results

Record status	Nature of request	Request date	Request status	Record No.
Submitted	Voter Records	12/12/2016	Active	2016000006

Step 4: View the request detail record and select **Back to search results**, alternatively, select **Edit Record** to make a change

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

J. Rogers is signed in Main menu Change password Sign out

Public Records Division

Agency Public Records Request Database

Public Record Request Detail Record

Record number: 2016000006

Record status: Submitted

Agency name: Bunker Hill Community College

RAO name: Jennifer Rogers

Nature of request: Voter Records

Detail summary of request: All voter records for students registered at the community college

Request received: 12/12/2016

Response provided: 12/13/2016

Record provided: 12/20/2016

Number of hours to fulfill request: 48

Processing fee charged: \$25.00

Fee petitions submitted: No

Request appealed: No

Court proceedings related to the response: No

Edit Record Inactivate record Print record Back to search results

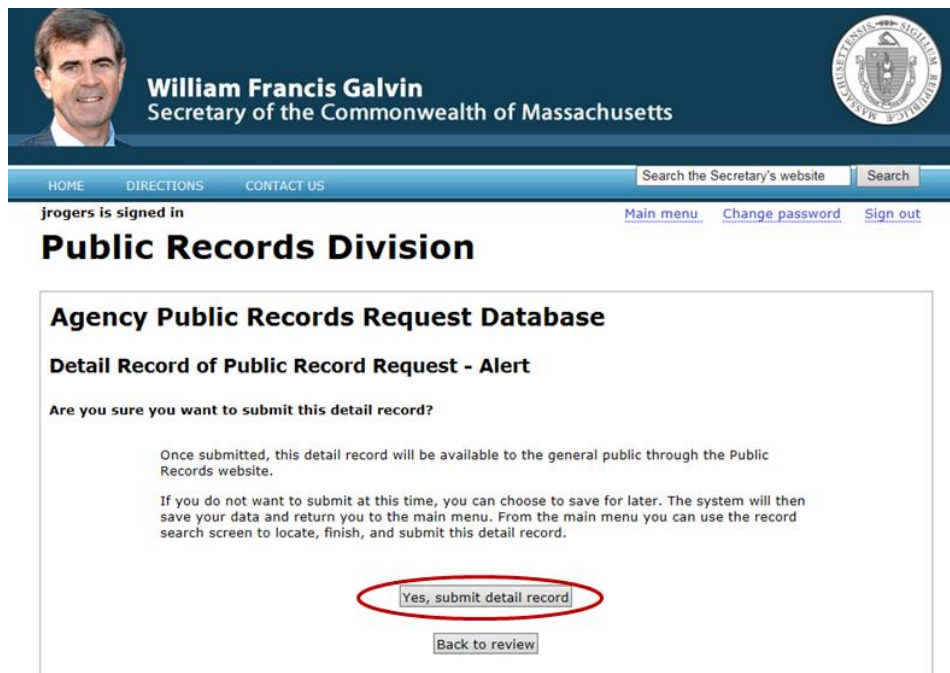
Step 5: Edit the request detail records and select **Continue**. (Note: Edit request detail record as needed.)

The screenshot shows the 'Agency Public Records Request Database' interface. At the top, there is a header with a photo of William Francis Galvin, Secretary of the Commonwealth of Massachusetts, and a search bar. Below the header, a navigation bar includes links for 'HOME', 'DIRECTIONS', and 'CONTACT US'. The main content area is titled 'Public Records Division' and 'Agency Public Records Request Database'. It displays the 'Detail Record of Public Record Request' for Record Number 2016000006. The record status is 'Submitted', the agency name is 'Bunker Hill Community College', and the RAO/Account name is 'Jennifer Rogers'. The nature of the request is 'Voter Records'. The summary of the request is 'All voter records for students registered at the community college'. The form includes fields for 'Date agency received request' (12/12/2016), 'Date agency provided response to requester' (12/13/2016), 'Date agency provided records to requester' (12/20/2016), 'Number of hours to fulfill request' (48), 'Cost of services charged to requester' (25.00), 'Fee petitions submitted' (No), 'Appeal filed by requester' (No), and 'Court proceedings related to the response' (No). At the bottom, there are two buttons: 'Continue' (highlighted with a red circle) and 'Cancel request'.

Step 6: Review request detail information and select **Submit**

The screenshot shows the 'Agency Public Records Request Database' interface, specifically the 'Review' form. The header and navigation bar are identical to the previous screenshot. The main content area is titled 'Public Records Division' and 'Agency Public Records Request Database'. It displays the 'Detail Record of Public Record Request - Review' for Record Number 2016000006. The record status is 'New', the agency name is 'Bunker Hill Community College', and the RAO/Account name is 'Jennifer Rogers'. The nature of the request is 'Voter Records'. The summary of the request is 'All voter records for students registered at the community college'. The form includes fields for 'Request received' (12/12/2016), 'Response provided' (12/13/2016), 'Record provided' (12/20/2016), 'Number of hours to fulfill request' (48), 'Processing fee charged' (\$25), 'Fee petitions submitted' (No), 'Request appealed' (No), and 'Court proceedings related to the response' (No). At the bottom, there are four buttons: 'Save for later', 'Submit' (highlighted with a red circle), 'Make corrections', and 'Return to the main menu'.

Step 7: Review request detail record and select **Yes, submit detail record**



William Francis Galvin
Secretary of the Commonwealth of Massachusetts

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

jrogers is signed in Main menu Change password Sign out

Public Records Division

Agency Public Records Request Database

Detail Record of Public Record Request - Alert

Are you sure you want to submit this detail record?

Once submitted, this detail record will be available to the general public through the Public Records website.

If you do not want to submit at this time, you can choose to save for later. The system will then save your data and return you to the main menu. From the main menu you can use the record search screen to locate, finish, and submit this detail record.

[Yes, submit detail record](#)

[Back to review](#)

Step 8: Review submittal confirmation and select **Back to Search**



William Francis Galvin
Secretary of the Commonwealth of Massachusetts

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jrogers is signed in Main menu Change password Sign out

Public Records Division

Agency Public Records Request Database

Detail Record of Public Record Request - Confirmation

Record number: 2016000006 Record status: Submitted

This information is submitted and is now available to the general public. If you need assistance with Public Records policy, or help using this website, contact: RAOManagerAdmin@sec.state.ma.us

[Back to Search](#)

Change password

Step 1: Select **Change password** from the sub-menu



The screenshot shows the top navigation bar of the website. The header includes a portrait of William Francis Galvin, his name, and title. Below this is a navigation bar with links: HOME, DIRECTIONS, CONTACT US, and a search bar. A user is logged in as 'Bonnie'. The 'Change password' link is circled in red. Below the navigation bar, the 'Public Records Division' is highlighted, and the 'Agency Public Records Request Database' is shown with a 'Main Menu' containing several links.

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

HOME DIRECTIONS CONTACT US Search the Secretary's website Search

Bonnie is signed in [Change password](#) [Sign out](#)

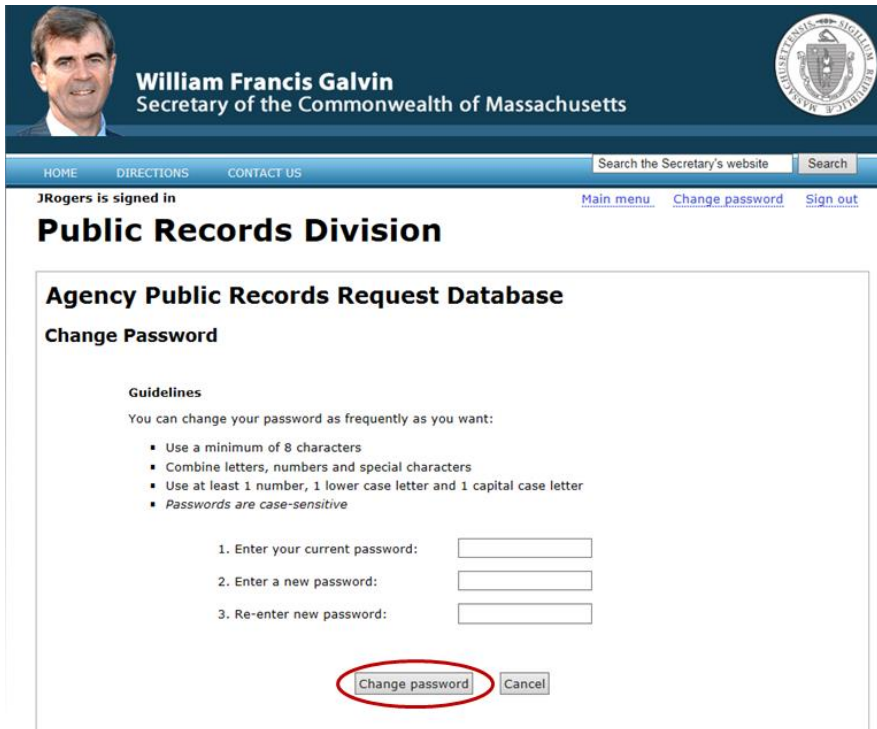
Public Records Division

Agency Public Records Request Database

Main Menu

- [Search for Public Records request detail records](#)
- [Add a new Public Records request detail record](#)
- [Add or update agency RAO accounts](#)
- [Update my account information](#)
- [Upload request detail tracked outside of the system](#)

Step 2: Enter old and new password and select **Change password**



The screenshot shows the 'Change Password' form. It includes a header with the same information as the previous screenshot. The user is logged in as 'JRogers'. The 'Change password' link is circled in red. Below the navigation bar, the 'Public Records Division' is highlighted, and the 'Agency Public Records Request Database' is shown with a 'Change Password' section. This section includes 'Guidelines' for password creation and three input fields for entering the current password, a new password, and re-entering the new password. The 'Change password' button is circled in red.

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HOME DIRECTIONS CONTACT US Search the Secretary's website Search

JRogers is signed in [Main menu](#) [Change password](#) [Sign out](#)

Public Records Division

Agency Public Records Request Database

Change Password

Guidelines

You can change your password as frequently as you want:

- Use a minimum of 8 characters
- Combine letters, numbers and special characters
- Use at least 1 number, 1 lower case letter and 1 capital case letter
- Passwords are case-sensitive

1. Enter your current password:

2. Enter a new password:

3. Re-enter new password:

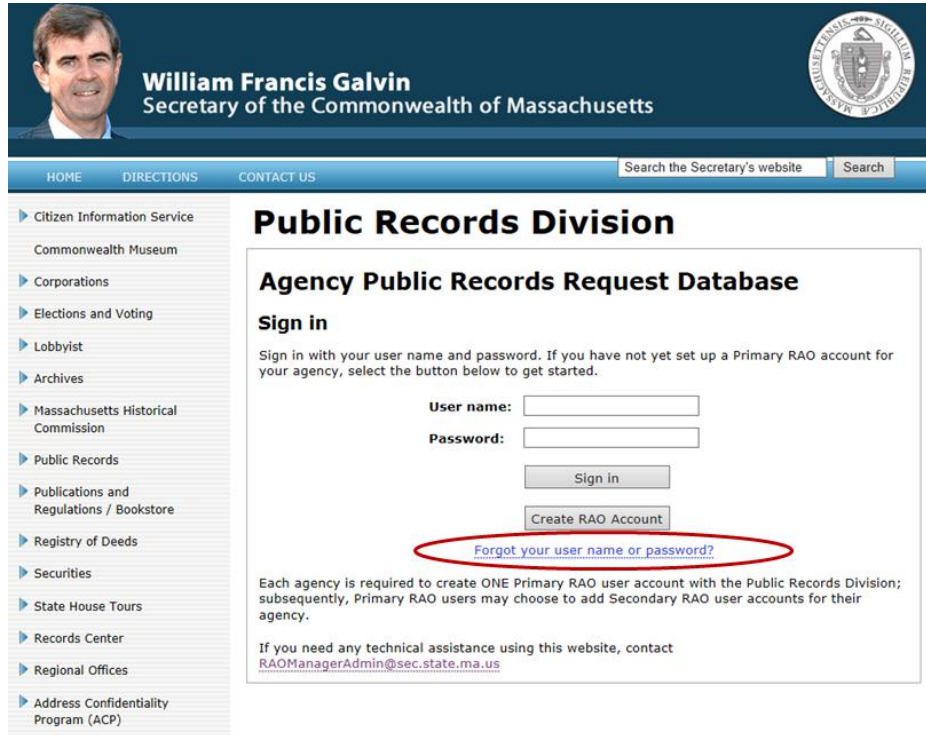
[Change password](#) [Cancel](#)

Step 3: Select **Return to main menu**



Forget user name or password

Step 1: Select **Forget your user name or password?** link



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Public Records Division

Agency Public Records Request Database

Sign in

Sign in with your user name and password. If you have not yet set up a Primary RAO account for your agency, select the button below to get started.

User name:

Password:

Sign in

Create RAO Account

[Forgot your user name or password?](#)

Each agency is required to create ONE Primary RAO user account with the Public Records Division; subsequently, Primary RAO users may choose to add Secondary RAO user accounts for their agency.

If you need any technical assistance using this website, contact
RAOManagerAdmin@sec.state.ma.us

Step 2: Enter password (or user name as the case may be) and select the appropriate "Get" button



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Public Records Division

Agency Public Records Request Database

User Name and Password Assistance

Get user name: Enter your email address

Get user name

Get new password: Enter your user name

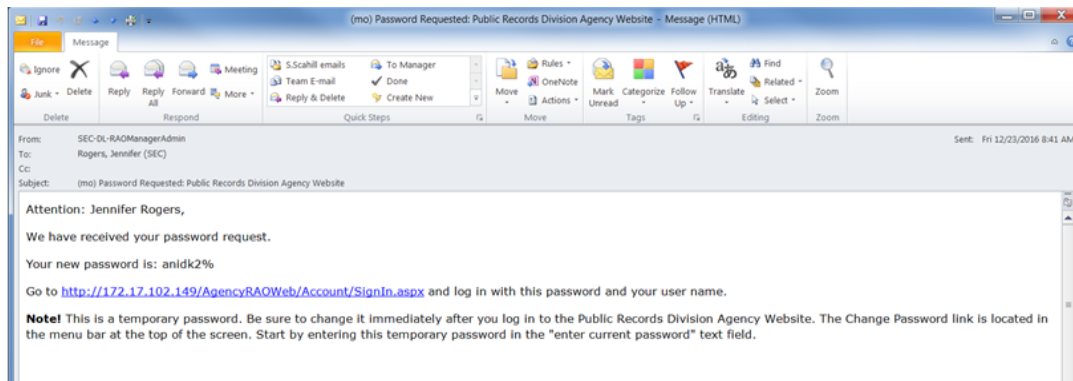
Get new password

Back to Sign in

Step 3: Select **Back to Sign in**

The screenshot shows the top of the Commonwealth of Massachusetts website with the Secretary's name, William Francis Galvin. Below the navigation bar, the 'Public Records Division' header is prominent. The main content area is titled 'Agency Public Records Request Database' and 'User Name and Password Assistance'. It includes a note about a temporary password being sent to the user's email. There are two input fields: one for 'Get user name' (with the placeholder 'Enter your email address') and one for 'Get new password' (with the placeholder 'Enter your user name' and the text 'JRogers' entered). Below each field is a corresponding button. At the bottom, a 'Back to Sign in' button is circled in red.

Step 4: You'll receive your password (or user name) at your primary email address



Upload request detail tracked outside of the system (bulk upload)

Overview

Three steps are involved when uploading bulk requests from an Excel spreadsheet.

Step 1: Upload request data from an Excel file into the “preview” grid

The “preview” grid acts as a staging area where you can resolve Excel file errors, duplicates found within the Excel file, and duplicates found between the Excel file and the Request Database.

Step 2: Resolve errors and duplicates (as needed)

From the preview grid, each request can be brought into an editor where fields in error can be changed or deleted.

Step 3: Submit requests to the Request Database

Move requests from the preview grid to the Request Database.

Only after all errors and duplicates have been resolved can requests be submitted to the Request Database.

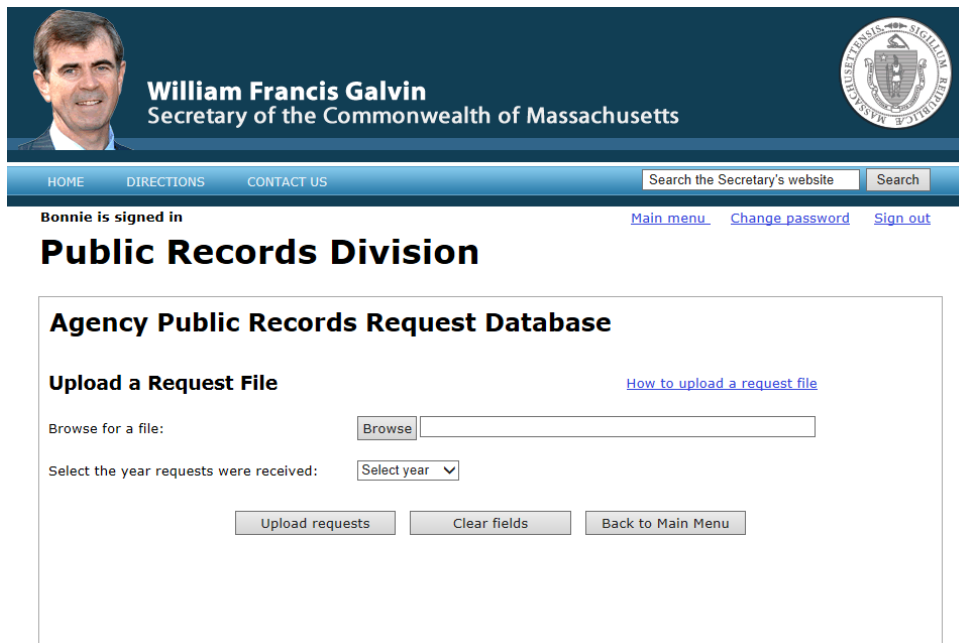
Step 1: Upload request data from Excel into the “preview” grid

Task A: Navigate to the Upload a Request File page

From the Main Menu, select **Upload request detail tracked outside of the system** link



Upload a Request File is displayed



Task B: Upload an Excel file into the preview grid

Select the **Browse** button to navigate to the Excel spreadsheet

Select the year from the **Select the year the requests were received** drop down

Select the **Upload requests** button to upload the Excel file request into the preview grid

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Public Records Division

Agency Public Records Request Database

Upload a Request File [How to upload a request file](#)

Browse for a file: C:\fakepath\Use Case 1g-No Errors.xlsx

Select the year requests were received: 2017 ▼

Preview grid displays

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Public Records Division

Agency Public Records Request Database

Upload a Request File [How to upload a request file](#)

Browse for a file:

Select the year requests were received: ▼

Uploaded Requests Preview

Records uploaded: 3

Item	Nature of Request	The date on which the request was received	The date on which a response is provided to the requestor	The date on which a public record is provided to the requestor	Error
0001	Massachusetts SWH Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1	04/01/2017	04/02/2017	04/03/2017	
0002	Massachusetts PPO Program Quarterly Financial Report of Senior Whole Health for the Period Ended July 1, 2017 Received 2	07/01/2017	07/02/2017	07/03/2017	
0003	Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended October 1, 2017	10/01/2017	10/02/2017	10/01/2017	

Step 2: Resolve errors and duplicates (as needed)

Errors and duplicates rules and general instructions

Only after all errors and duplicates have been resolved can requests be submitted to the Request Database.

Resolve errors

- Errors are listed when the content does not match the expected format
- Errors are flagged to the right of each request in the preview grid under the Error column

Resolve duplicates

- Select the **View duplicates** button
- Duplicates are listed when found a) within the Excel file and b) between the preview grid and the Request Database
- Duplicates are determined by comparing these fields
 - Nature of request
 - The date on which the request was received
 - The date on which a response is provided to the requestor
 - The date on which a public record is provided to the requestor

Edit/delete requests

- Each request in the preview grid is hyperlinked to an editing routine
- In the edit routine, the request fields can be changed or deleted
- Errors are displayed in the edit routine
- Note: Although the Upload routine provides editing and deleting capability, when many changes are required, it's advisable to edit the original Excel file and re-upload the data

Only one date per date field rule

Only one date per date field is valid. This rule applies to all date fields.

The date on which a response is provided to the requestor date field rule

For the "The date on which a response is provided to the requestor" date field, the single date agencies are to report should be the date they began providing responsive records to the requestor.

Excel file naming convention rule

The Excel file name should only include numbers and alphabetic characters. Hyphens and underscores may also be used. The file name should NOT include special characters, punctuation (periods, commas, apostrophes), or spaces. An example of a properly named Excel file is: DeptofHealth2017.xlsx.

Task A: Resolve column names that do not match the Excel template

The Excel Request template must be strictly observed in terms of content and format. Column header names must be as expected and defined in the Excel Request template.

See Agency Records Request Website Upload Template Excel file and user guide.



The screenshot shows the top of the website with a header for William Francis Galvin, Secretary of the Commonwealth of Massachusetts. Below the header is a navigation bar with links for HOME, DIRECTIONS, and CONTACT US, and a search bar. The main content area is titled "Public Records Division" and "Agency Public Records Request Database". A red oval highlights an error message: "Column names do not match the Excel template. Refer to How to upload a request file." Below the error message is a section titled "Upload a Request File" with a link "How to upload a request file". The upload section includes a "Browse for a file:" label, a "Browse" button, a text input field, a "Select the year requests were received:" label, a dropdown menu showing "2017", and three buttons: "Upload requests", "Clear fields", and "Back to Main Menu".

William Francis Galvin
Secretary of the Commonwealth of Massachusetts

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Public Records Division

Agency Public Records Request Database

Correct these errors on your form:

- Column names do not match the Excel template. Refer to How to upload a request file.

Upload a Request File

[How to upload a request file](#)

Browse for a file:

Select the year requests were received:

Task B: Resolve Excel formatting errors

After uploading the Excel file into the preview grid, errors may be displayed.

Select the **Item** number to open each request using the detail editor.



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Secretary of the Commonwealth of Massachusetts



HOME DIRECTIONS CONTACT US

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Public Records Division

Agency Public Records Request Database

Correct these errors on your form:

- Number of errors found in Excel request records: 2
Requests can be submitted to the database only after all errors have been corrected

Upload a Request File

[How to upload a request file](#)

Browse for a file:

Select the year requests were received:

Uploaded Requests Preview

Records uploaded: 3

Item	Nature of Request	The date on which the request was received	The date on which a response is provided to the requestor	The date on which a public record is provided to the requestor	Error
0001	Massachusetts SWH Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1	04/01/2017	4/2/2017, 4/3/2017	04/03/2017	Yes
0002	Massachusetts PPO Program Quarterly Financial Report of Senior Whole Health for the Period Ended July 1, 2017 Received 2	07/01/2017	07/02/2017	07/03/2017	

Edit request record – change date

Correct the date on which a response is provided to the requestor

The date must be entered in MM/DD/YYYY format and only one date can be entered into the field (see **Only one date per date field rule**)

Make the change and select the **Save** button

The screenshot shows the 'Agency Public Records Request Database' form. At the top, there is a header for William Francis Galvin, Secretary of the Commonwealth of Massachusetts, with navigation links for HOME, DIRECTIONS, CONTACT US, and a search bar. Below the header, it indicates 'Bonnie is signed in' and provides links for Main menu, Change password, and Sign out. The main title is 'Public Records Division'. The form itself is titled 'Agency Public Records Request Database' and includes a message: 'Correct these errors on your form:'. A red oval highlights the error: 'The date on which a response is provided to the requestor must be entered in MM/DD/YYYY format'. Under the 'Request Detail' section, the 'Item Number' is 0001 and the 'Nature of Request' is 'Massachusetts SWH Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1'. A character count shows '179 character(s) remaining'. The form contains several date fields: 'The date on which the request was received:' (04/01/2017), 'The date on which a response is provided to the requestor:' (4/2/2017, 4/3/2017), 'The date on which a public record is provided to the requestor:' (04/03/2017), 'The time required to comply with supervisor of records orders:', 'The number of hours required to fulfill the request (hours):' (1), 'The number of hours required to fulfill the request (minutes):' (0), and 'Fees charged to the person making the request, if any:' (\$25.00). A red oval highlights the 'The date on which a response is provided to the requestor:' field, which contains the text '4/2/2017, 4/3/2017'.

Agency Public Records Request Database

Correct these errors on your form:

- The date on which a response is provided to the requestor must be entered in MM/DD/YYYY format

Request Detail

Item Number: 0001

Nature of Request:
Massachusetts SWH Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017
Received 1

179 character(s) remaining

The date on which the request was received: 04/01/2017

* The date on which a response is provided to the requestor: 4/2/2017, 4/3/2017

Petitions submitted (Yes/No): No

The date on which a public record is provided to the requestor: 04/03/2017

The time required to comply with supervisor of records orders:

The number of hours required to fulfill the request (hours): 1

The number of hours required to fulfill the request (minutes): 0

Fees charged to the person making the request, if any: \$25.00

The message **Request updated** confirms the changes were saved



William Francis Galvin
Secretary of the Commonwealth of Massachusetts



HOME DIRECTIONS CONTACT US

Search the Secretary's website Search

Bonnie is signed in [Main menu](#) [Change password](#) [Sign out](#)

Public Records Division

Agency Public Records Request Database

Request updated

Request Detail

Item Number: 0003

Nature of Request:

Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended October 1, 2017

188 character(s) remaining

The date on which the request was received:	10/01/2017
The date on which a response is provided to the requestor:	10/02/2017
Petitions submitted (Yes/No):	No
The date on which a public record is provided to the requestor:	10/01/2017
The time required to comply with supervisor of records orders:	
The number of hours required to fulfill the request (hours):	3
The number of hours required to fulfill the request (minutes):	1000

After you correct errors, the number of errors in the message changes from 2 to 1



William Francis Galvin
Secretary of the Commonwealth of Massachusetts



HOME DIRECTIONS CONTACT US

Search the Secretary's website Search

Bonnie is signed in [Main menu](#) [Change password](#) [Sign out](#)

Public Records Division

Agency Public Records Request Database

Correct these errors on your form:

- Number of errors found in Excel request records: 1
- Requests can be submitted to the database only after all errors have been corrected

Upload a Request File

[How to upload a request file](#)

Browse for a file:

Select the year requests were received:

Uploaded Requests Preview

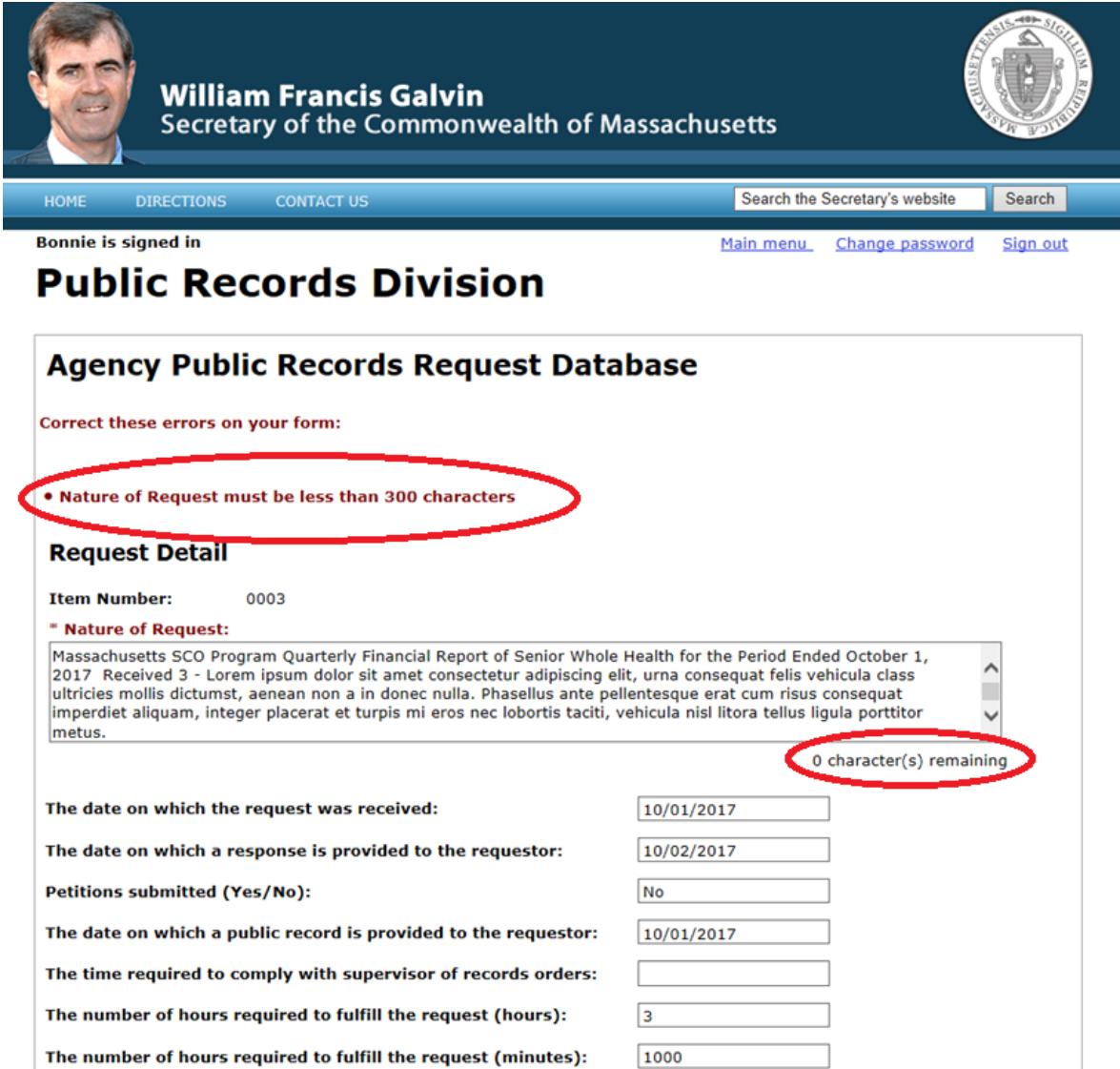
Records uploaded: 3

Item	Nature of Request	The date on which the request was received	The date on which a response is provided to the requestor	The date on which a public record is provided to the requestor	Error
0001	Massachusetts SWH Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1	04/01/2017	04/02/2017	04/03/2017	
0002	Massachusetts PPO Program Quarterly Financial Report of Senior Whole Health for the Period Ended July 1, 2017 Received 2	07/01/2017	07/02/2017	07/03/2017	

Edit request record – Reduce characters in Nature of Request

A common error is too many characters in the **Nature of request** field.

Make the change and select the **Save** button.



The screenshot shows the top of the Commonwealth of Massachusetts website with the Secretary's name, William Francis Galvin, and the state seal. Below the navigation bar, the user is logged in as Bonnie. The main heading is "Public Records Division". The page title is "Agency Public Records Request Database". A red circle highlights an error message: "• Nature of Request must be less than 300 characters". The "Request Detail" section shows the "Item Number" as 0003 and the "Nature of Request" field containing a long text string. A red circle highlights the "0 character(s) remaining" status. Below the text field, there are several input fields for dates, a dropdown for "Petitions submitted (Yes/No)", and two input fields for the number of hours and minutes required to fulfill the request.

Bonnie is signed in [Main menu](#) [Change password](#) [Sign out](#)

Public Records Division

Agency Public Records Request Database

Correct these errors on your form:

- Nature of Request must be less than 300 characters

Request Detail

Item Number: 0003

* Nature of Request:

Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended October 1, 2017 Received 3 - Lorem ipsum dolor sit amet consectetur adipiscing elit, urna consequat felis vehicula class ultricies mollis dictumst, aenean non a in donec nulla. Phasellus ante pellentesque erat cum risus consequat imperdiet aliquam, integer placerat et turpis mi eros nec lobortis taciti, vehicula nisl litora tellus ligula porttitor metus.

0 character(s) remaining

The date on which the request was received: 10/01/2017

The date on which a response is provided to the requestor: 10/02/2017

Petitions submitted (Yes/No): No

The date on which a public record is provided to the requestor: 10/01/2017

The time required to comply with supervisor of records orders:

The number of hours required to fulfill the request (hours): 3

The number of hours required to fulfill the request (minutes): 1000

Task C: Resolve duplicates between the uploaded file and the Request Database

After uploading the Excel file into the preview grid, 3 duplicates are reported.

When duplicates exist between the Excel file and the Request Database, you may be attempting to upload requests that have already been submitted to the Request Database.

Select the **View Duplicates** button to identify the requests in error.

The screenshot shows the 'Agency Public Records Request Database' interface. At the top, there is a header for William Francis Galvin, Secretary of the Commonwealth of Massachusetts, with navigation links for HOME, DIRECTIONS, and CONTACT US, and a search bar. Below the header, it indicates 'bonnie is signed in' and provides links for Main menu, Change password, and Sign out.

Public Records Division

Agency Public Records Request Database

Correct these errors on your form:

- Number of duplicate records found between the uploaded file and the Request Database: 3
- Requests can be submitted to the database only after all errors have been corrected

Upload a Request File

Browse for a file:

Select the year requests were received:

Uploaded Requests Preview

Records uploaded: 25

Item	Nature of Request	The date on which the request was received	The date on which a response is provided to the requestor	The date on which a public record is provided to the requestor	Error
0001	Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1	04/01/2017	04/02/2017	04/03/2017	

Public Records Division

Agency Public Records Request Database

Upload Request Duplicates

Number of duplicate records found between the uploaded file and the Request Database: 3

Nature of Request	Duplicate items numbers
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1	0001
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended July 1, 2017 Received 2	0002
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended September 30, 2016	0025

Task D: Resolve duplicates within the Excel file and between the uploaded file and the Request Database

After uploading the Excel file into the preview grid, 4 duplicates exist within the Excel file and 4 duplicates exist between the Excel file and the Request Database.

Select the **View Duplicates** button to identify the item numbers in error.



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Agency Public Records Request Database

Correct these errors on your form:

- Number of duplicate records found between the uploaded file and the Request Database: 4
- Number of duplicate records found within the uploaded file: 4
- Requests can be submitted to the database only after all errors have been corrected

Upload a Request File

[How to upload a request file](#)

Browse for a file:

Select the year requests were received:

Uploaded Requests Preview

Records uploaded: 28

Item	Nature of Request	The date on which the request was received	The date on which a response is provided to the requestor	The date on which a public record is provided to the requestor	Error
------	-------------------	--	---	--	-------

Upload Request Duplicates displays with two grids

The first grid displays 2 sets of duplicates within the Excel file.

The second grid displays 4 items in the Excel file that already exist in the Request Database.



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Agency Public Records Request Database

Upload Request Duplicates

Number of duplicate records found within the uploaded file: 4

Nature of Request	Duplicate items numbers
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1	0001, 0025
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended September 30, 2016 1	0026, 0027

Number of duplicate records found between the uploaded file and the Request Database: 4

Nature of Request	Duplicate items numbers
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1	0001, 0025
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended July 1, 2017 Received 2	0002
Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended September 30, 2016	0028

[Back to upload a request file](#) [Print results](#)

Step 3: Submit data to Request Database

Task A: Select the **Submit preview** button

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Upload a Request File [How to upload a request file](#)

Browse for a file:

Select the year requests were received:

Uploaded Requests Preview

Records uploaded: 3

Item	Nature of Request	The date on which the request was received	The date on which a response is provided to the requestor	The date on which a public record is provided to the requestor	Error
0001	Massachusetts SWH Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1	04/01/2017	04/02/2017	04/03/2017	
0002	Massachusetts PPO Program Quarterly Financial Report of Senior Whole Health for the Period Ended July 1, 2017 Received 2	07/01/2017	07/02/2017	07/03/2017	

Task B: Select the **Submit preview** button to continue

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Agency Public Records Request Database

Upload a Request File [How to upload a request file](#)

Browse for a file:

Select the year requests were received:

Uploaded Requests

Records uploaded: 3

Item	Nature of Request	The date on which the request was received	The date on which a response is provided to the requestor	The date on which a public record is provided to the requestor	Error
0001	Massachusetts SWH Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1	04/01/2017	04/02/2017	04/03/2017	
0002	Massachusetts PPO Program Quarterly Financial Report of Senior Whole Health for the Period Ended July 1, 2017 Received 2	07/01/2017	07/02/2017	07/03/2017	

Submit Preview

If you wish to save a copy of the uploaded request preview, download the requests into an Excel file using the Download preview button.

Task C: Successful upload confirmation

The message **All requests submitted successfully** confirms the upload of all requests in the preview grid into the Request Database



The screenshot displays the web interface of the Agency Public Records Request Database. At the top, there is a header for William Francis Galvin, Secretary of the Commonwealth of Massachusetts, with a search bar and navigation links. Below this, a message states "Bonnie is signed in" with links for "Main menu", "Change password", and "Sign out". The main heading is "Public Records Division". The central content area is titled "Agency Public Records Request Database" and features a red circle around the message "All requests submitted successfully". Below this message is the "Upload a Request File" section, which includes a "Browse for a file:" label, a "Browse" button, a text input field, a "Select the year requests were received:" label, a "Select year" dropdown menu, and three buttons: "Upload requests", "Clear fields", and "Back to Main Menu". A link "How to upload a request file" is also present.

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Agency Public Records Request Database

All requests submitted successfully

Upload a Request File

[How to upload a request file](#)

Browse for a file:

Select the year requests were received: ▼

How to reset the preview grid to upload a request file

Select **Delete requests in preview** button to remove the requests from the preview grid

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Agency Public Records Request Database

Correct these errors on your form:

- Number of errors found in Excel request records: 1
- Requests can be submitted to the database only after all errors have been corrected

Upload a Request File

[How to upload a request file](#)

Browse for a file:

Select the year requests were received:

Uploaded Requests Preview

Records uploaded: 3 **Delete requests in preview**

Item	Nature of Request	The date on which the request was received	The date on which a response is provided to the requestor	The date on which a public record is provided to the requestor	Error
------	-------------------	--	---	--	-------

The message **All uploaded requests were deleted** confirms the preview grid has been cleared for another upload

Note: Only one file can be uploaded at a time

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Agency Public Records Request Database

All uploaded requests were deleted

Upload a Request File

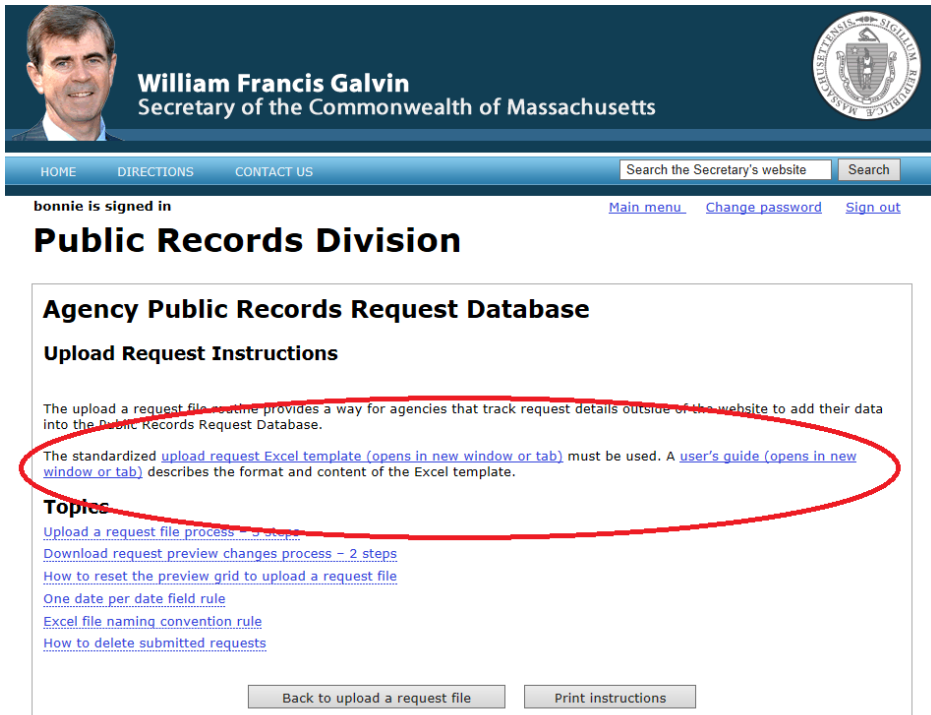
[How to upload a request file](#)

Browse for a file:

Select the year requests were received:

How to upload a request file online instructions

The online Upload Request Instructions contains links to the Public Request Upload Template Excel file and User Guide.



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Public Records Division

Agency Public Records Request Database

Upload Request Instructions

The upload a request file routine provides a way for agencies that track request details outside of the website to add their data into the Public Records Request Database.

The standardized [upload request Excel template \(opens in new window or tab\)](#) must be used. A [user's guide \(opens in new window or tab\)](#) describes the format and content of the Excel template.

Topics

- [Upload a request file process - 3 steps](#)
- [Download request preview changes process - 2 steps](#)
- [How to reset the preview grid to upload a request file](#)
- [One date per date field rule](#)
- [Excel file naming convention rule](#)
- [How to delete submitted requests](#)

[Back to upload a request file](#) [Print instructions](#)

The Topics are “hot linked”, and when selected, the content expands downward.



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Agency Public Records Request Database

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Topics

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- [Excel file naming convention rule](#)
- [How to delete submitted requests](#)

Back to upload a request file Print instructions



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Upload Request Instructions

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Topics

- [Upload a request file process – 3 steps](#)

Step 1: Upload request data from Excel into a "preview" grid

- Select the "Browse" button to navigate to the Excel spreadsheet
- Select the year the requests were received from the "year" drop down list
- Select the "Upload requests" button to upload the Excel file data into a preview grid

Step 2: Resolve errors and duplicates

- The "preview" grid lists all the requests uploaded from the Excel file
- Resolve errors
 - Errors are listed when the content doesn't match the expected format
 - Errors are flagged to the right of each request in the preview grid under the Error column
- Resolve duplicates
 - Select the "View duplicates" button
 - Duplicates are listed when found a) within the Excel file and b) between the preview grid and the Request Database
 - Duplicates are determined by comparing these fields

How to download request preview changes into an Excel file

A download feature provides a way to save the changes you make in the preview grid.

Task A: Download requests from the preview grid

- Select the "Download preview" button
- A tabular list of the preview data is displayed

Task B: Save data to file

- Select the "disk" icon to export data
- Select "Excel" menu item
- Follow your browser's instructions to save the file

The screenshot shows the 'Agency Public Records Request Database' interface. At the top, there is a header for William Francis Galvin, Secretary of the Commonwealth of Massachusetts. Below this is a navigation bar with links for HOME, DIRECTIONS, and CONTACT US, along with a search bar. The main content area is titled 'Public Records Division' and 'Agency Public Records Request Database'. It includes an 'Upload a Request File' section with a file browser and a 'Select the year requests were received' dropdown. Below this is an 'Uploaded Requests Preview' section. In this section, there are buttons for 'Delete requests in preview', 'Submit preview', 'Download preview' (circled in red), and 'Print preview'. Below the buttons is a table with three rows of request data. At the bottom of the page, a browser download bar is visible, showing a file named 'RequestsDownloadedFromRequestUploadRoutine_11_29_2017.xls' with 'Open', 'Save', and 'Cancel' buttons.

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Public Records Division

Agency Public Records Request Database

Upload a Request File [How to upload a request file](#)

Browse for a file:

Select the year requests were received:

Uploaded Requests Preview

Records uploaded: 3

Item	Nature of Request	The date on which the request was received	The date on which a response is provided to the requestor	The date on which a public record is provided to the requestor	Error
0001	Massachusetts SWH Program Quarterly Financial Report of Senior Whole Health for the Period Ended April 1, 2017 Received 1	04/01/2017	04/02/2017	04/03/2017	
0002	Massachusetts PPO Program Quarterly Financial Report of Senior Whole Health for the Period Ended July 1, 2017 Received 2	07/01/2017	07/02/2017	07/03/2017	
0003	Massachusetts SCO Program Quarterly Financial Report of Senior Whole Health for the Period Ended October 1, 2017	10/01/2017	10/02/2017	10/01/2017	

Do you want to open or save RequestsDownloadedFromRequestUploadRoutine_11_29_2017.xls from 172.17.102.149?

How to Delete requests from the Request Database

Delete one request at a time

From the main menu, select **Search for Public Records request detail records** link

On the search page, enter values to filter the requests to the one you wish to delete

Select the **Search** button

From the results grid, select the appropriate **Record Number**

Agency Public Records Request Database

Search for a Public Records Request Detail Record

Agency name:

Date type:

Search by date: Date from: Date to:

RAO Account name:

Nature of request:

☐ Starts With ☒ Contains ☐ Matches Exactly

Appeal filed by requester: Processing fee:

Fee Petitions submitted: Request status:

Record number: Record status:

Results per page: Court proceedings related to the response:

Records found: 1316

Record status	Nature of request	Request date	Record viewable on website	Record No.
Submitted	OSD Not Custodian of Record Sought	01/05/2017	Active	2017000020
Submitted	ITT 46 OSD Not Custodian of Records Sought	01/06/2016	Active	2017000021

From the Public Record Request Detail Record page, select **Inactivate record** button



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Public Records Division

Agency Public Records Request Database

Public Record Request Detail Record

Record number:	2017000020
Record status:	Submitted
Agency name:	Operational Services Division
RAO name:	Thomas C. Hall
Nature of request:	OSD Not Custodian of Record Sought
Detail summary of request:	SDO Records containing MA DOT Letters of Intent between 1/1/13 -1/1/16 for certified firm
Request received:	01/05/2017
Response provided:	01/09/2017
Record provided:	01/09/2017
Number of hours to fulfill request:	3 Hours
Processing fee charged:	\$0.00
Fee petitions submitted:	No
Request appealed:	No
Court proceedings related to the response:	No

Delete uploaded requests in bulk

Contact the Public Records Division

Email them at RAOManagerAdmin@sec.state.ma.us or call 617-727-2832 for assistance