



Open Records Requests (ORR)

*Simplifying the ORR & FOIA Process
for Public Organizations with these Tips & Tricks*

For many public agencies, non-profits, and other entities subject to **Open Records Requests (ORR)** or **FOIA (Freedom of Information Act)** requests, the challenge is real: managing complex workflows, ensuring timely responses, and maintaining compliance—all while safeguarding sensitive information. Whether you're a city government, a school district, or any other organization bound by transparency laws, these records requests require a structured, efficient approach to avoid costly errors and delays.

- ✓ **Tip:** Make sure that each request includes key details such as:
 - **Requester's Name & Email Address**
 - **Request Type** (e.g., general records, email communications)
 - **Matter Name** (the specific subject or matter of the request)
 - **Privilege & Non-Privilege Recipients' Information**
 - **Search Criteria** (Custodians (full name(s) and email address(es)) and Search Terms)
 - **Date Filters and Special Instructions**
- ✓ **Tip:** Always name your search unique to the request to keep track of each request. For example, for each request, a unique ORR number is assigned (e.g. ORR2024_001 Search). This way, all search results are tied directly to the original request for easy identification.
- ✓ **Tip:** If leveraging the Purview platform, and you're awaiting approval, and the 72-hour window is nearing its end, simply refresh the search to maintain the accuracy and relevance of the results.
- ✓ **Tip:** Before export, **deduplicate your email mailboxes** to ensure no redundant or irrelevant information is included in the final delivery. Additionally, **apply client-provided privilege exclusions** (*when applicable*), ensuring that sensitive documents are correctly tagged and protected.
- ✓ **Tip:** For ShareFile uploads, (or the secure file-sharing service of your choice), always ensure **the upload** is made under the correct project folder to maintain proper organization and make future searches easier.

Ready to Simplify Your FOIA/ORR Process?

Learn how **Open Records Request as a Service** can help you save time, reduce risks, and increase your organization's response management efficiency. Download our detailed guide to best practices for managing public requests. **Get connected to an S2|DATA expert to discuss more at: info@s2data.com** ←