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MEMORANDUM HR23-2021

To: Agency Administrators
 From: Carolyn Horwich, Esq., Director of Human Resources
 Subject: UPDATED Public Records Exemption Process
 Date: September 24, 2021

As People First continues to refine the steps for its new Public Records Exemption Process, Judicial-Related Office ("JRO") Human Resources ("HR") staff will have direct responsibilities for processing the Public Records Exemption Request Form ("PRE Form").

Starting **September 25, 2021**, please follow the steps below:

Step 1: Any employee with a new employee-specific public records exemption (e.g., Protected Identity or Restricted Relative) marked in People First **on or after July 1, 2021** must complete the PRE Form, which includes having the form notarized. JRO HR staff do **not** need to follow these steps for employees whose employee-specific public records exemption had been marked in People First **prior** to July 1, 2021.

Step 2: The employee submits the notarized PRE Form to the JRO HR office.

Step 3: JRO HR staff goes to the employee's Personal Information page in People First. At the bottom of that page, JRO HR staff marks the appropriate employee-specific public records exemption indicator. An employee may have more than one employee-specific records exemption. The available choices are:

- Sworn/Certified
- Restricted Employee
- Restricted Relative
- Protected Identity
- Publish Nickname

When marking a new public records exemption indicator, a screen will appear and the JRO HR user will be required to certify (certification statement presented on the Personal Info screen) that the PRE Form has been/will be submitted to the JRO HR user.

Step 4: Create a Ticket -- The JRO HR staff submits the employee's notarized PRE Form within three (3) business days after marking the exemption in People First, using the Tickets screen in People First. The Tickets function is used to communicate with People First and, more importantly, to submit documents necessary for People First to complete an action.

The Tickets screen is not something JRO HR staff have used yet. The Tickets screen appears at the top right of the People First Manager page:



When creating the ticket to submit the notarized PRE Form, the following information data must be entered. Failure to enter each required data element will result in the ticket not being submitted:

1. Category Field – select *Public Records Exemption* from the dropdown options; after selecting the category, an Appointment ID field will display.
2. Appointment ID Field – enter the Appt ID of the employee whose notarized Public Records Exemption Request Form is being submitted.
 - a. A warning message will be presented if the certification statement for the Appt ID has not been completed in People First (Personal Info screen).
3. Subject Field – the field will populate with the text “*Public Records Exemption Request Form for [Appt ID Employee Name]*” and cannot be edited; ID and employee name displayed will be based on the ID entered in the Appointment ID field.
4. Description Field – enter the text “*PRE Form*”.
5. Attachment -- attach the employee’s notarized Public Records Exemption Request Form; **the ticket cannot be submitted without an attachment.**

Step 5: The People First team conducts audits on a recurring basis of all employees who have a newly marked employee-specific public records exemption to validate that a completed and notarized Public Records Exemption Request Form has been received.

Thank you.