JustFOIA How-To

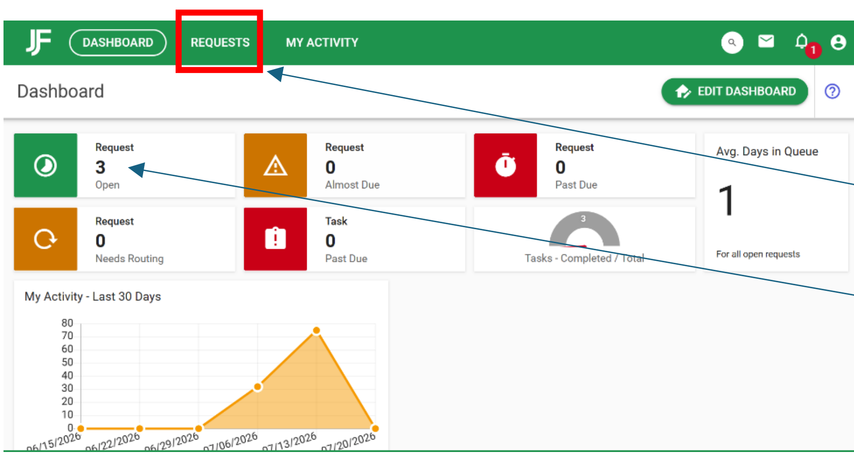
ACCESSING JUSTFOIA

To access JustFOIA, navigate to https://chapelhillnc.justfoia.com/ and select sign-in with Microsoft. JustFOIA uses Single Sign-On which means you will login using your Town credentials.

EMAIL NOTIFICATIONS

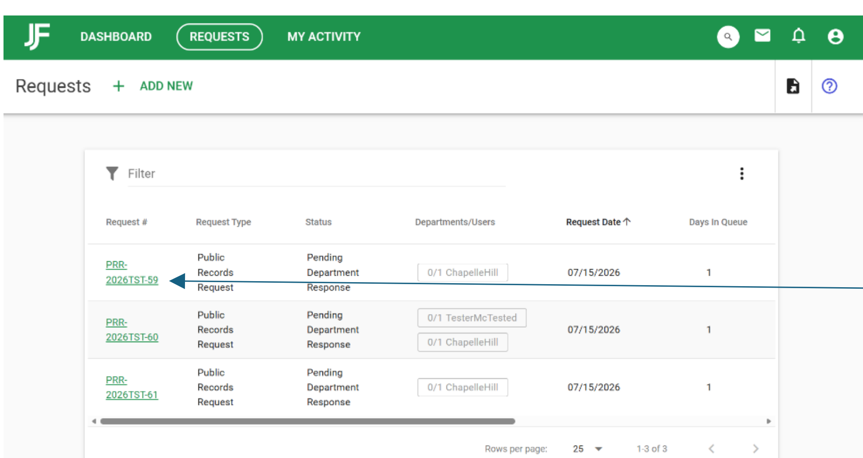
You will receive an Outlook notification each time a records request is assigned to you. Clicking the link in the email will take you directly to the request in JustFOIA:

> Dear User/ Department,
>
> A new task has been assigned to you or your department for **Request Number: PRR-2026TST-18**. Instructions for tasks can be found in the system.
>
> Thank you,
>
> JustFOIA



NAVAGATING THE DASHBOARD

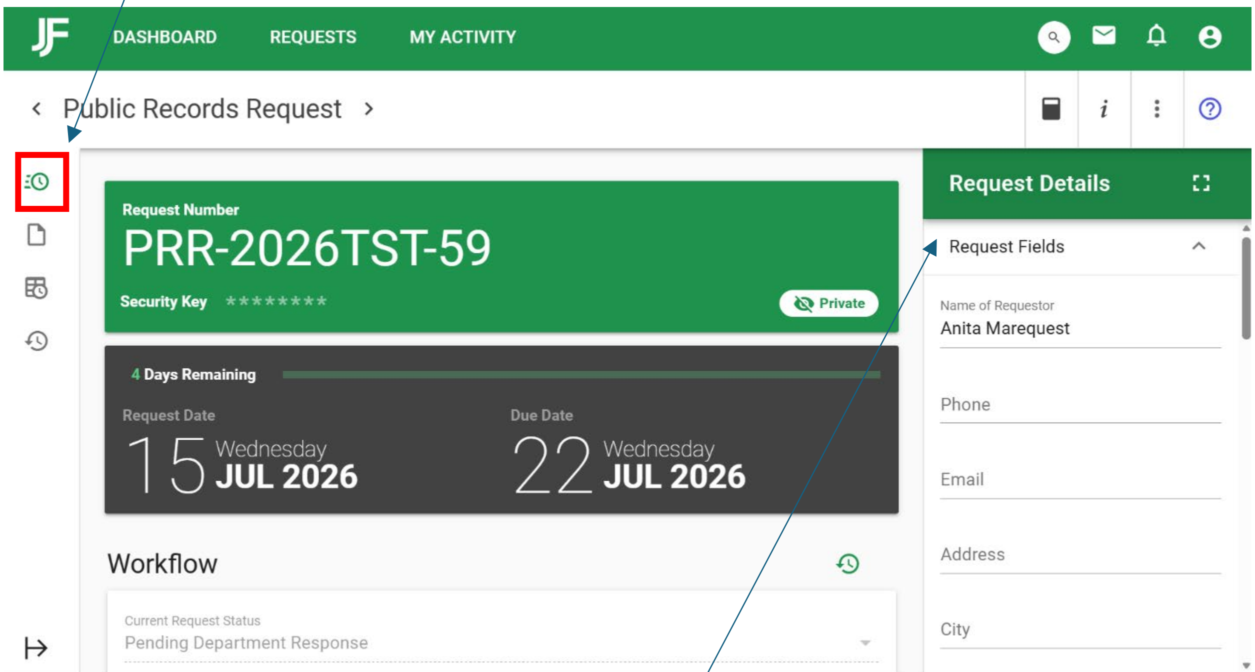
Once you log in to JustFOIA, the first screen you will see is your **Dashboard.** This page provides an overview of your activity in the system. Click the 'Requests' tab at the top of the screen to view a complete list of current requests. *(note: you can also click on the 'Open', 'Almost Due', and 'Past Due' quick links to bring up your requests filtered by status).*



OPENING A REQUEST

On the 'Requests' page, click the link of the request number you want to view. This will open the full request details, including its workflow, correspondence, response documents, and internal discussions.

When the request opens, you will be taken to the **Workflow** page. This page displays the full records request, with key request details—such as the request number, security key, and date information.

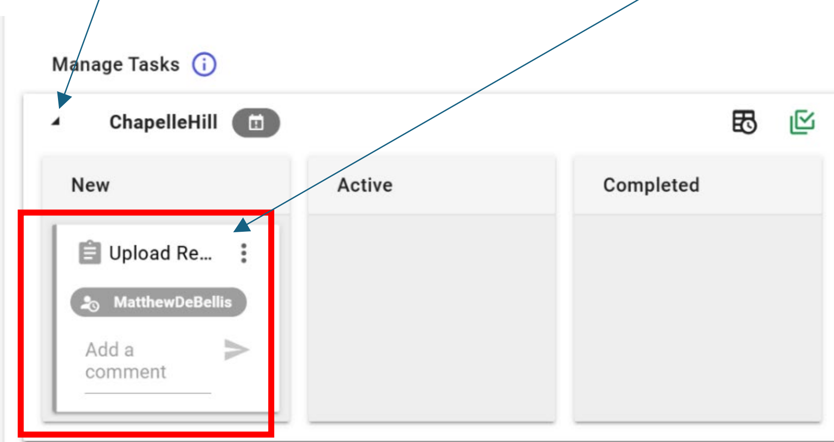


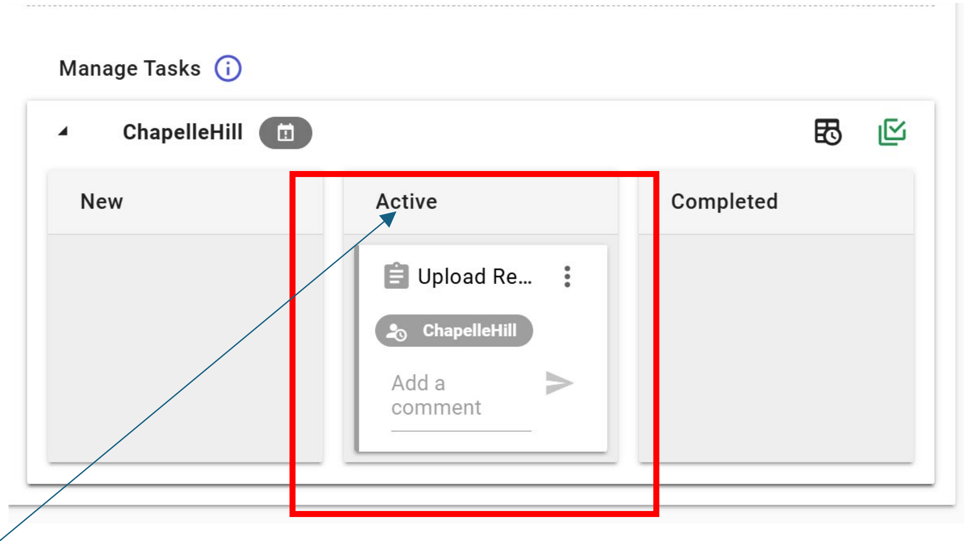
Review the information provided in the 'Request Details' pane. This section contains all form data submitted by the requestor. From this page, you will initiate your request response.

RESPONDING TO A REQUEST:

After you have reviewed the request details and confirmed that you have responsive records, open the 'Manage Tasks' area. Click the arrow next to your name to expand your assigned tasks. You will see a task labeled 'Upload Responsive Documents.

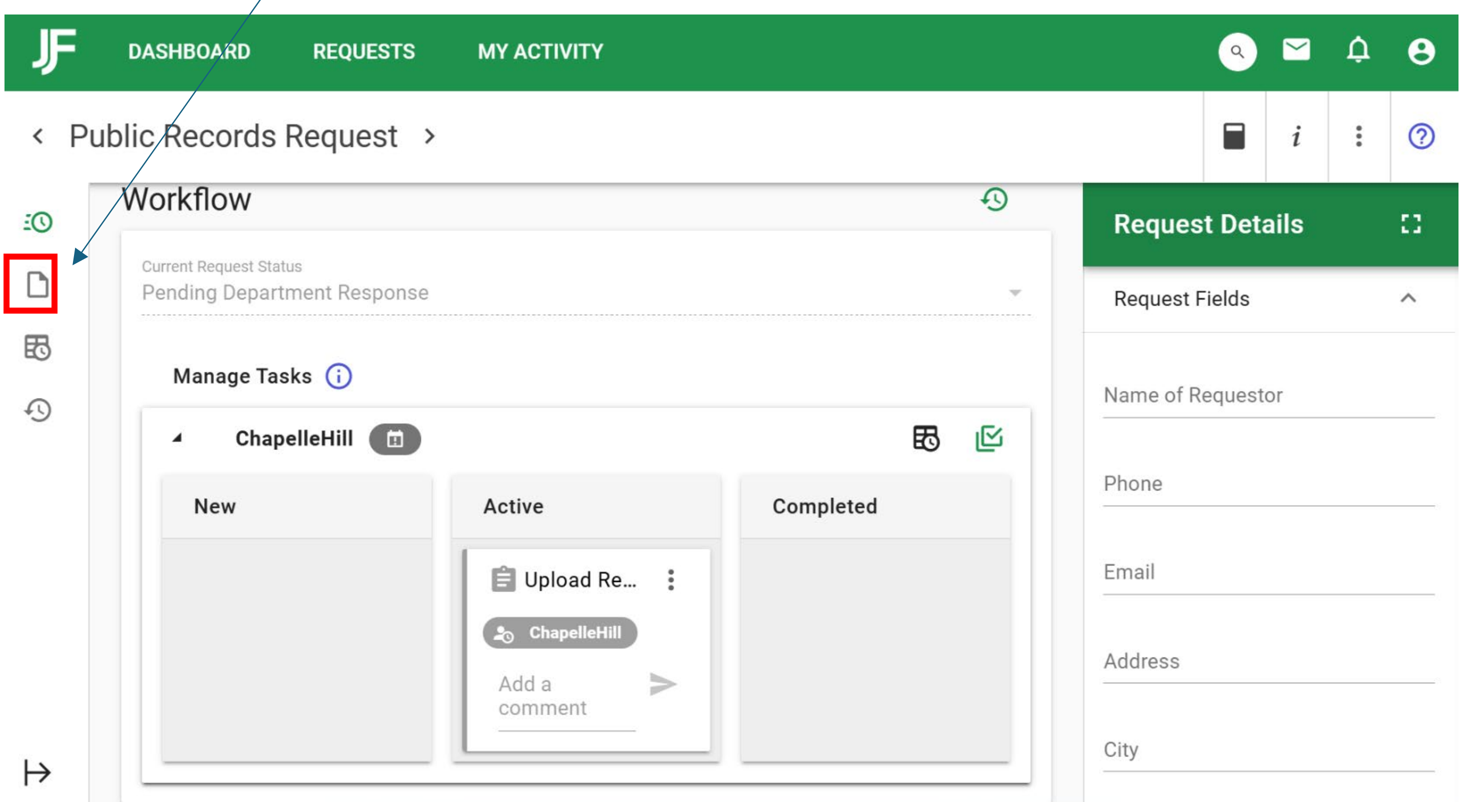
You will make your request response active in the system by clicking the 'Upload Responsive Documents' tag and dragging it into the 'Active' column. (Note: You may also start the task in either of the following ways: Click the three dots next to 'Upload Responsive Documents' and select **Start**; or click directly on 'Upload Responsive Documents' to open a dropdown where you can change the task status to **Active** and view additional instructions for completing this step).

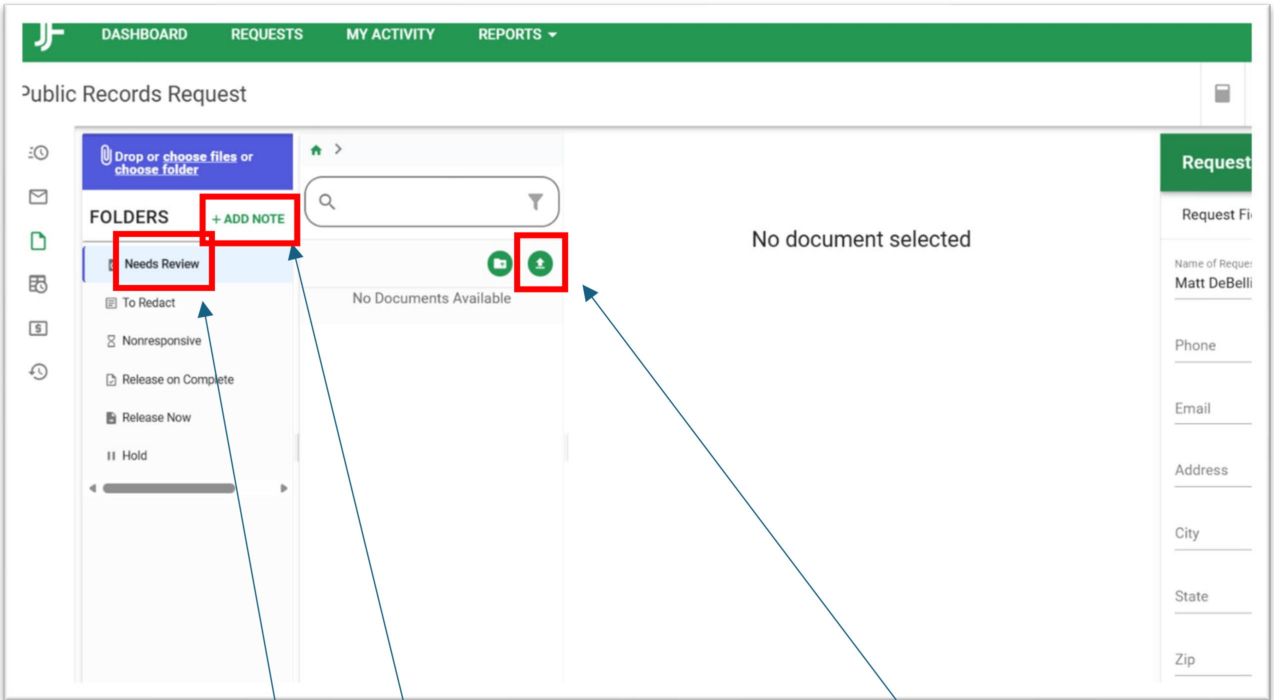




Once you've dragged the 'Upload Responsive Documents' from the 'New' column into the 'Active' column, you're ready to begin the process of uploading your records.

Click on the 'Response Docs' button on the left-hand side:





UPLOADING DOCUMENTS AND ADDING NOTES

Upload your responsive documents by clicking the upload button, 'choose files' link, or dragging your files into the upload area. All documents uploaded will automatically be added to the 'Needs Review' folder. **You should leave all records in this folder.**

If the response requires addditonal information or context, you can add a note to the response by selecting the '+ADD NOTE' link in the FOLDER column. In the pop-up 'Add Note' window, update the file name if necessary, and complete the descritption and body fields. **Leave 'Response Doc Type' as the default selection,** then click 'Save'.

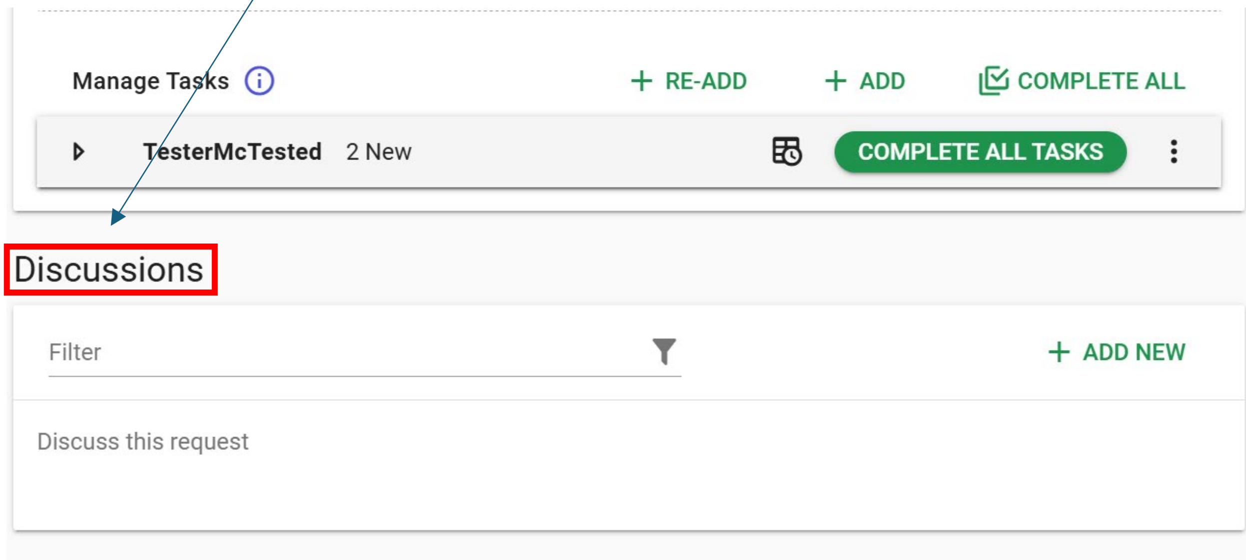
COMPLETING YOUR TASK

After you finish uploading all responsive records and adding any supplemental notes, click the Workflow icon on the left-hand menu to return to the main Record Request page. Once back in the Workflow section, drag the 'Upload Responsive Documents' to the 'Completed' column.

You can also click the 'Complete All Tasks' to complete your portion of the request and to send back to the Clerk's Office.

NON-RESPONSIVE RECORDS:

If you do not have any records responsive to the request, notify the Clerk's Office by posting a message in the 'Discussions' section, located below 'Manage Tasks':



- Click '+ ADD NEW' to open a new discussion entry
- Enter a 'Subject', then type your message in the body (for example: "I have no records for this request.").
- In the **'Email this message to the following people'** field type '**Clerk's Office'** , then click send

Note: Use the Discussions section for any internal communication with the Clerk's Office related to the specific request, including:

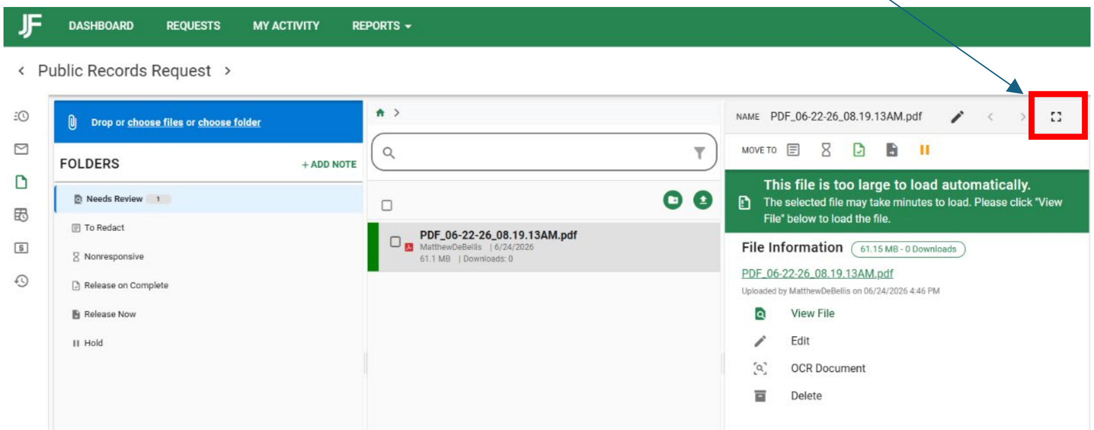
- Requesting additional information from the requestor
- Indicating that you need additional time to complete your request
- Communicating that you are not the appropriate person to respond to the request

You can also send discussion messages to other users who have accounts in JustFOIA. All messages posted here should relate only to the request in question.

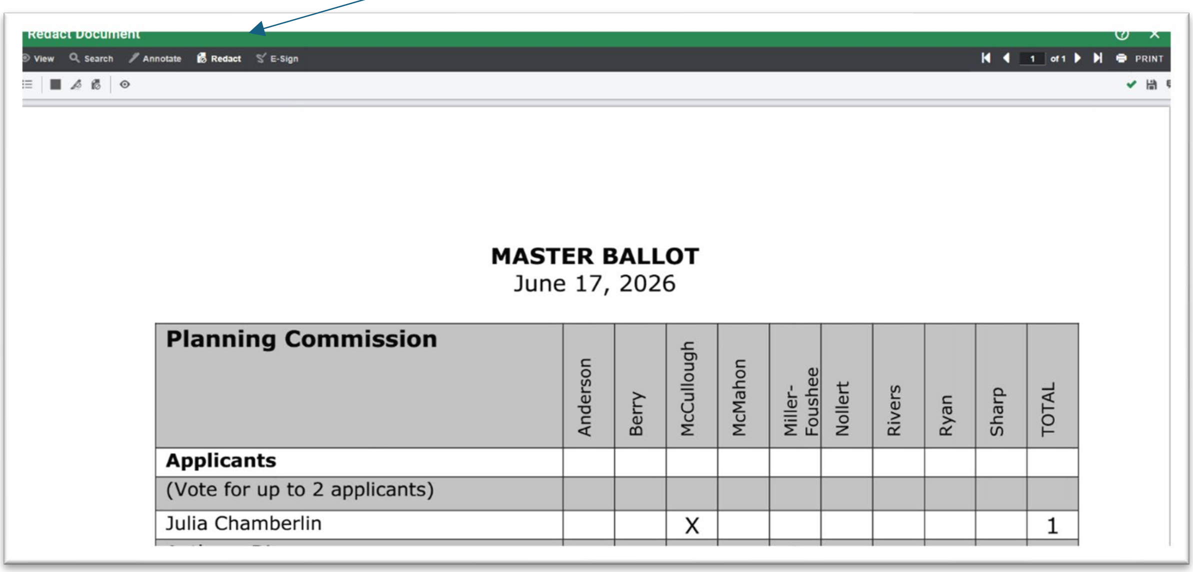
REDACTIONS

If a records request includes documents that contain confidential information or content not responsive to the request, follow these steps to apply redactions:

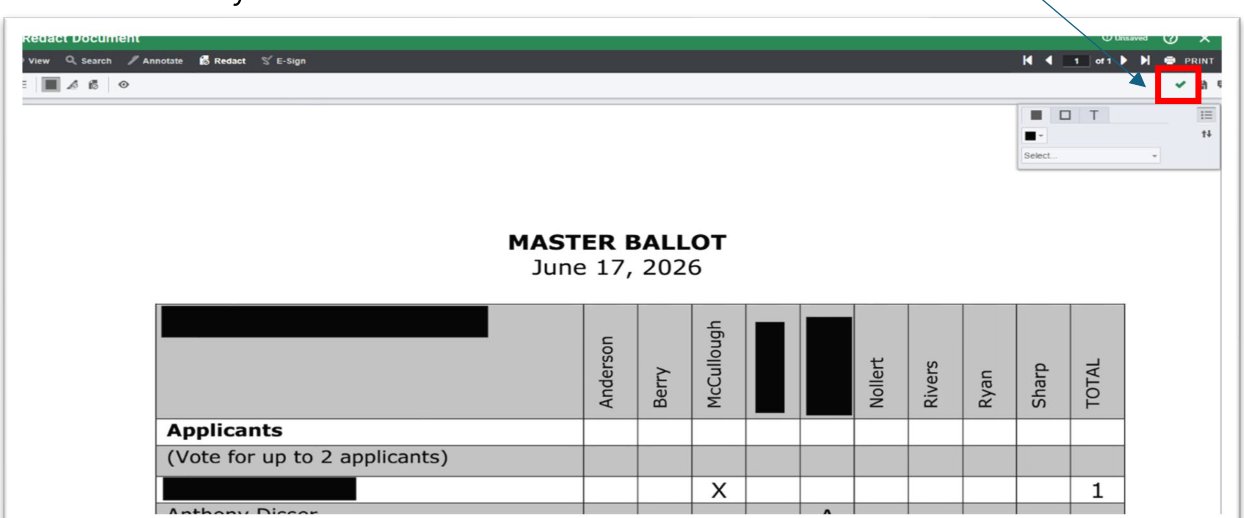
1. Navigate to the ‘Response Docs’ tab on the left-hand side. Select the document that requires redaction and click on the expand symbol (shown below) to open in full-screen view.



2. In the expanded screen, click ‘Redact’ on the black toolbar. A black redaction box will appear – double-click it to begin manual redactions.



3. Highlight the text you want redacted and ensure that the black redaction box fully covers the sensitive information. When you are finished, click the green checkmark to confirm your redactions.



You may also use automated search options to locate information that should be redacted:

- Enter keywords into the search bar to identify specific terms for redaction.
- Use the drop-down menu next to the search bar to search by category – such as names, phone numbers, or social security numbers.

Review all identified sections, then click the green checkmark once all redactions have been finalized.

TIPS & TRICKS:

If you're ever unsure how to proceed on a page in JustFOIA, click the question mark icon at the top of the screen. This help tool provides explanations for each section of the page and guides you through the actions available so you know exactly what to do next.