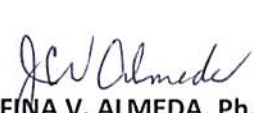


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Execution Date	Rev. No.	Revision Type	Change Description	Page Affected	Originator
January 20, 2021	Ø	New	Newly established in accordance with ISO 9001:2015 requirements.	-	ISO Facilitator

Prepared by:	Reviewed by:	Approved by:
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PSRTI FREEDOM OF INFORMATION GUIDELINES

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SPECIAL ORDER No. 2021-014

January 18, 2021

TO : ALL CONCERNED
SUBJECT : **PSRTI FREEDOM OF INFORMATION GUIDELINES**

In line with Executive Order No. 2, s. of 2016, "Operationalizing in the Executive Branch the People's Constitutional Right to Information and the State Policies to Full Public Disclosure and Transparency in the Public Service and Providing Guidelines Therefore", Special Order 62 is hereby issued to define the balance between the need to grant the public maximum access to documents of public interest in the possession of the **Philippine Statistical Research and Training Institute (PSRTI)** and the agency's obligation to ensure the accuracy and integrity of the documents, safeguard the deliberative process and promptly respond to requests without hampering normal operations. In this regard, these guidelines are being issued for information of PSRTI personnel.

I - GENERAL PROVISIONS

- 1. LEGAL BASES.** These Guidelines are based on the following laws, rules and regulations:
 - 1.1. THE 1987 PHILIPPINE CONSTITUTION**
 - 1.1.1 Article III, Section 7. The State guarantees the right of the people to information on matters of public concern.
 - 1.1.2 Article II, Section 28. The State adopts the policy of full public disclosure of all its transactions involving public interest.
 - 1.2. REPUBLIC ACT NO. 6713** or the Code of Conduct and Ethical Standards for Public Officials and Employees.
 - 1.3. MEMORANDUM CIRCULAR NO. 78, SERIES OF 1964**, as amended by Memorandum Circular No. 196, series of 1968, providing for rules governing security of classified matters in government offices.
 - 1.4. EXECUTIVE ORDER NO. 608, SERIES OF 2007** and its implementing rules and regulations, establishing a national security clearance system for government personnel with access to classified matters and for other purposes.



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- 1.5. **EXECUTIVE ORDER NO. 2, SERIES OF 2016**, “Operationalizing in the Executive Branch the People’s Constitutional Right to Information and the State Policies to Full Public Disclosure and Transparency in the Public Service and Providing Guidelines therefor.”
2. **RATIONALE.** PSRTI, by virtue of Republic Act 10625, otherwise known as the Philippine Statistical Act of 2013, mandates the agency to be the statistical research and training arm of the Philippine Statistical System. As such, it is tasked to develop an integrated research and training program on the theories, concepts and methodologies for the promotion of the statistical system. In the performance of this mandate, it is imperative that complete, timely, transparent, consistent and credible documents are provided and shared to the public regarding its research and training outputs/activities.
3. **GUIDING PRINCIPLES.** The following principles will be adhered to:
 - 3.1. **MAXIMUM DISCLOSURE.** Documents issued by and under the custody of the PSRTI shall be disclosed to the public, as applicable or upon request, subject to exceptions and/or limitations recognized by existing laws and jurisprudence to override risk of harm to a legitimate interest.
 - 3.2. **CATEGORICAL SCOPE/LIST OF EXCEPTIONS.** The exceptions to access shall be clearly and categorically stated, particularly for documents regularly requested by the public.
 - 3.3. **SAFEGUARD THE DELIBERATIVE PROCESS.** The disclosure of documents that affect, frustrate or hinder the decision-making process, as may be determined by the PSRTI, shall be prevented.
 - 3.4. **COMPLETE CLASSIFICATION OF DOCUMENTS.** Documents in the PSRTI’s possession shall be classified in accordance with existing laws, rules and regulations.
 - 3.5. **CLEAR PROCEDURE TO FACILITATE ACCESS.** A system shall be established to ensure access without sacrificing the PSRTI’s obligation to prevent damage to public records and disruption of normal operation and protect the deliberative process and privacy.
 - 3.6. **AVAILABILITY OF AN APPEAL.** A relief from the decision of the PSRTI shall be afforded to the public through an appeal to the next higher authority.
 - 3.7. **PROTECTION OF PRIVACY.** Pursuant to Republic Act No. 10173, otherwise known as the Data Privacy Act of 2012, responsible officials of the PSRTI shall afford full protection to the right to privacy of individuals.

4. **COVERAGE.** All requests for documents to the PSRTI are included in these guidelines.
5. **EXCEPTIONS.** The availability of access to a particular public record is determined based on the nature of the document sought, that is: (a) being of public concern or one that involves public interest, and (b) not being exempted by law from the operation of the constitutional guarantee. As such, it is not sufficient that the document sought is of public concern or involves public interest; it is also required that the document must not be among those exempted by law from the operation of the constitutional guarantee, such as:
 - 5.1 **NATIONAL SECURITY MATTERS AND INTELLIGENCE DOCUMENTS.** There is a governmental privilege against public disclosure with respect to state secrets regarding military, diplomatic and other national security matters. Likewise, documents on inter-governmental exchanges prior to conclusion of treaties and executive agreements may be subject to reasonable safeguards for the sake of national interests.
 - 5.2 **TRADE OR INDUSTRIAL SECRETS,** pursuant to the Intellectual Property Code (RA No. 8293) and other related laws and banking transactions pursuant to the Secrecy of Bank Deposits Act (RA No. 1405, as amended).
 - 5.3 **CRIMINAL MATTERS,** such as those relating to the apprehension, prosecution, and detention of criminals, which courts may not inquire into prior to such arrest, detention, and prosecution. Efforts at effective law enforcement would be extremely jeopardized by free public access to, for example, police information regarding rescue operations, the whereabouts of fugitives, or leads on covert criminal activities.
 - 5.4 **OTHER CONFIDENTIAL DOCUMENTS.** The Code of Conduct and Ethical Standards for Public Officials and Employees (RA No. 6713) prohibits public officials and employees from using or divulging “confidential or classified information officially known to them by reason of their office and not made available to the public” to further their private interests, to give undue advantage to anyone, or to prejudice the public interest.
 - 5.5 **OTHER ACKNOWLEDGED LIMITATIONS** to document access include diplomatic correspondence, closed-door Cabinet meetings and executive sessions of either House of Congress, as well as internal deliberations of the Supreme Court. (*Chavez vs. Presidential Commission on Good Government, 299 SCRA 744*).
 - 5.6 **OTHER EXCEPTIONS AS MAY BE ISSUED/RELEASED PURSUANT TO EO.** No. 2, s. of 2016, Operationalizing in the Executive Branch the People’s Constitutional Right to Information and the State Policies of Full Public

6. DEFINITION OF TERMS

- 6.1 data.gov.ph.** The Open Data website that serves as the government's comprehensive portal for all public government data that is searchable, understandable, and accessible.
- 6.2 eFOI.gov.ph.** The website that serves as the government's comprehensive FOI website for all information on the FOI. Among many other features, eFOI.gov.ph provides a central resource for the public to understand the FOI, to locate records that are already available online, and to learn how to make a request for information that is not yet publicly available. eFOI.gov.ph also promotes agency accountability for the administration of the FOI by graphically displaying the detailed statistics contained in Annual FOI Reports so that they can be compared by agency and over time.
- 6.3 Information.** Any records, documents, papers, reports, letters, contracts, minutes, and transcripts of official meetings, maps, books, photographs, data, research materials, films, sound and video recording, magnetic or other tapes, electronic data, computer stored data, any other like or similar data or materials recorded, stored or archived in whatever format, whether offline or online, which are made, received, or kept in or under the control and custody of any government office pursuant to law, executive order, and rules and regulations or in connection with the performance or transaction of official business by any government office.
- 6.4 Information for disclosure.** Information promoting the awareness and understanding of policies, programs, activities, rules and revisions affecting the public, government agencies, and the community and economy. It also includes information encouraging familiarity with the general operations, thrusts, and programs of the government. In line with the concept of proactive disclosure and open data, these types of information can already be posted to government websites without need for written requests from the public.
- 6.5 Official Record/s.** Information produced or received by a public officer or employee, or by a government office in an official capacity or pursuant to a public function or duty.
- 6.6 Open Data.** Publicly available data structured in a way that enables the data to be fully discoverable and usable by end users.
- 6.7 Private Sector.** Refers to an organization created or formed by private persons for the purpose of socio-economic development, rendering service or providing assistance to the public. These include, among others, business organizations, non-government organizations, people's organizations, industry associations, religious organizations, cultural associations, professional associations, civic clubs, and cooperatives.

- 6.8 Public Records.** Information required by laws, executive orders, rules, or regulations to be entered, kept, and made publicly available by a government office.
- 6.9 Personal Information.** Any information, whether recorded in a material form or not, from which the identity of an individual is apparent or can be reasonably and directly ascertained by the entity holding the information, or when put together with other information would directly and certainly identify an individual.
- 6.10 Sensitive Personal Information.** Shall refer to personal information as defined in the Data Privacy Act of 2012:
- An individual's race, ethnic origin, marital status, age, color, and religious philosophical or political affiliations;
 - An individual's health, education, genetic or sexual life of a person, or to any proceedings for any offense committed or alleged to have been committed by such person, the disposal of such proceedings or the sentence of any court in such proceedings.
 - Issued by government agencies peculiar to an individual which includes, but is not limited to, social security number, previous or current health records, licenses or its denials, suspension or revocation, and tax returns; and specifically established by an executive order or an act of Congress to be kept classified.

7. PROTECTION OF PRIVACY. While providing access to information, public records, and official records, responsible officials shall afford full protection to the right to privacy of the individual as follows:

- The PSRTI shall ensure that personal information *including sensitive personal information* in its custody or under its control is disclosed or released only if it is material or relevant to the subject-matter of the request and its disclosure is permissible under this order or existing laws, rules or regulations.
- The PSRTI shall protect personal information *including sensitive personal information* in its custody or control by making reasonable security arrangements against leaks or premature disclosure of personal information which unduly exposes the individual whose personal information is requested, to vilification, harassment, or any other wrongful acts.
- PSRTI officials and employees who have access, authorized or unauthorized, to personal information *including sensitive personal information* in the custody of the office, must not disclose that information except when authorized under this order or pursuant to existing laws, rules, or regulations.

II - CLASSIFICATION OF DOCUMENTS

1. **PSRTI DOCUMENTS AS CLASSIFIED.** PSRTI documents are classified as Confidential, Restricted, and Available to the Public, as the case may be. The complete list of documents classified as confidential, restricted and available to the public is in **Annex A**.

- 1.1 **CONFIDENTIAL.** These are information, documents, or materials within the terms of reference of PSRTI in which their unauthorized disclosure would be prejudicial to the interest of a partner government agency/activity or would cause administrative embarrassment to an individual. The following kinds of documents, among others, are CONFIDENTIAL:

- 1.1.1. Certain personnel records and staff matters, such as documents relating to administrative investigations;
- 1.1.2. Administrative documents, proposed promotions, performance evaluations, and Personal Data Sheet (PDS);
- 1.1.3. Results of individual pre- and post-evaluation tests of training participants.
- 1.1.4. Other documents that may classified as "Confidential" by the PSRTI Governing Board and Executive Director.

- 1.2 **RESTRICTED.** These are information, documents, or materials to which access is restricted because there exists a legal impediment and/or standard issued by the Executive Director that requires such public records to be withheld from public access. This may include results of research studies where the PSRTI is required to secure the permission of its partner agency(ies) before these can be released to parties not part of the project.

- 1.3 **AVAILABLE TO THE PUBLIC.** These are information, documents, or materials to which public access may be allowed. This shall include documents covered by the PSRTI commitments to agreements with other institutions on open data sharing, data sharing policies, or with other similar instruments with provisions for mandatory public sharing of specific information. The Knowledge Management Division shall upload a copy of all open and available records in the websites of the PSRTI, data.gov.ph and eFoi.gov.ph.

- 1.4 **AUTHORITY TO CLASSIFY, RECLASSIFY, AND DECLASSIFY DOCUMENTS.** Except for documents classified as Available to the Public, the authority to classify, reclassify, and declassify documents shall be exercised by the Executive Committee (EXECOM). In so doing, the EXECOM will thus by itself serve as the agency's Clearance Review Committee.

- 1.5 COVERAGE OF CLASSIFICATION.** The classification of documents shall be applied to all non-exempted documents issued by the PSRTI.
- 1.6 DURATION OF CLASSIFICATION**
- 1.6.1 The original classification authority will be lodged at the EXECOM level, and establish specific date for declassification based on the duration of the security sensitivity of the document. Upon reaching the mentioned date, the document shall be automatically declassified.
- 1.6.2 The original classification authority may extend the duration of classification, change the level of classification, or reclassify a specific document in accordance with the standards and procedures for classifying document/ information.
- 1.7 DOCUMENT IDENTIFICATION AND MARKINGS.** At the time of original classification, the following shall appear on the cover sheet of each classified document (**Annex B**):
- 1.7.1 One of the three (3) classification levels defined in Title II, Section 1 of these Guidelines;
- 1.7.2 Identity (name and position) of the original classification authority;
- 1.7.3 Agency and office of origin;
- 1.7.4 Reference number of the document;
- 1.7.5 Instructions related to the classified document as to its storage, reproduction, disposition and responsibility of the Staff/Official handling the document; and
- 1.7.6 Additional markings that supplement the classification level markings.
- 2. DOCUMENT ACCESS AND TRANSMISSION.** A detailed procedure for the Internal and External Access of PSRTI documents is attached as Annex C.
- 2.1 DESIGNATION OF A RECEIVING OFFICER OF ALL REQUESTS FOR DOCUMENTS FROM THE PUBLIC.** Except for inter-office requests, requests from other government offices, Court/Quasi-Judicial Bodies, and Legislative Bodies, the Chief Administrative Officer (CAO) of the Finance and Administrative Division (FAD) shall be designated as Receiving Officer (RO) to receive all requests for information from the public. In the performance of this duty, the FAD CAO shall comply with the identified duties and responsibilities in Annex C. Procedure for the Internal and External Access of PSRTI Documents. The CAO as RO will process the request **UPON RECEIPT** and transmit to the Division(s) concerned **WITHIN 24 HOURS** of the requested information or documents.
- 2.2 TRANSFER TO CONCERNED DIVISION.** The concerned Division shall assess and classify the requested document/s within two days for

endorsement to the Executive Director for approval/denial. Procedure is as follows:

- a. Assessment of requested document based on internal classification;
- b. Maintain second copies of request for information and other documents relevant to the issuances of such clearances; and
- c. Endorsed either a "denial" or approval" decision to the Executive Director on the basis of its assessment and review.

2.3 DECISION OF THE EXECUTIVE DIRECTOR. Within two days of receipt of endorsement from the concerned Division, the Executive Director will do one the following:

- a. Confirm/approve endorsement of request for release of the RO; or
- b. Deny requested document for release of the RO; or
- c. Revert request for further review or consideration of concerned Division.

2.4 DOCUMENT TRANSMISSION OF CLASSIFIED DOCUMENTS

2.4.1 Classified documents shall have a designated official storage located that will be determined by the EXECOM. The documents, to be maintained by the RO, shall not be moved or removed without proper authorization. Second copies will be under the custody of the concerned Division.

2.4.2 Each Division shall establish controls to ensure that classified documents are transmitted under conditions that provide adequate protection and prevent access by unauthorized persons.

2.4.3 Transmission of CONFIDENTIAL documents may be covered by a receipt system when required by the sender. The receipt system shall make use of a receipt form, which is a covering document that identifies the addressor, addressee and title/description of the requested (classified) document. The name of the sender shall also be printed, stamped, or typed on the form. The receipt form, however, will not have the attached classified document. This same form will be signed by the recipient and returned to the sender/sending/source agency once delivered.

2.4.4 For documents classified as "CONFIDENTIAL", use a white A4 paper size as cover sheet, with a ½" blue border.

Security classification and instructions are printed on the front page of the cover sheet. The back page is designed to show a record of transmission of the document. A sample copy of the Cover Sheet is attached as **Annex B**.

All documents classified as CONFIDENTIAL, from the moment they are initiated, shall be covered by appropriate cover sheets, which shall stay with such documents until both are authorized for destruction.

Cover sheets (**Annex B**) prescribed in this **Special Order** shall be used only for classified documents transmitted among the various Departments of the National Government.

2.4.5 Mode and Format of Transmission for Classified Documents

2.4.5.1 Required format when transmitting by Philippine registered mail or diplomatic pouch:

- The documents shall be enclosed in two opaque envelopes or covers.
- A receipt shall be enclosed with the document as appropriate.
- The inner envelope or cover shall be addressed and sealed. The return address should likewise be written in the inner envelope.
- The classification on the front and back of the inner envelope shall be marked in such a way that the markings will be easily seen when the outer cover is removed. Special markings required shall be placed on the front of the inner envelope.
- The inner envelope shall be enclosed in the outer envelope or cover. The classification marking of the inner envelope must not be detectable through the outer envelope.
- The outer envelope with the inner envelope will then be forwarded. Classification or other special markings shall not appear on the outer envelope.

2.4.5.2 Required format when transmitting by specifically authorized couriers:

- The documents shall be enclosed in a sealed envelope.
- The document shall be covered by a receipt as appropriate.

- The envelope shall be addressed and provided with a return address. No classification or other markings shall appear on the envelope.

2.5 SPECIAL PROVISION FOR NON-RESTRICTED ACCESS. Members of the PSRTI Governing Board are allowed a non-restricted access to all memoranda, reports, minutes, proposals, or other documents under the purview of the Board.

3. DOCUMENT STORAGE

- 3.1 Before storage, documents shall be classified, labeled and color/number-coded properly.
- 3.2 Each Division shall identify/provide their storage facilities within its premises that are suitable for storage of classified documents. The storage location shall be inspected annually and approved by the Executive Director or authorized representative to ensure that this is adequate and safe.
- 3.3 Given the available budget resources, current storage facilities/rooms that do not provide adequate protection and security for the classified documents shall be improved/renovated, and provided a space.
- 3.4 Documents/records format are classified into: (i) printed documents; and, (ii) electronic documents.

3.4.1 Printed Documents:

CONFIDENTIAL and RESTRICTED documents shall be stored in metal file cabinets equipped with a steel lock bar and combination pad lock. The file cabinets must have the size and weight that would minimize the chance of unauthorized physical removal.

3.4.2 Electronic Documents:

- Any device (e.g. PC, laptop, flash disk, etc.) that stores electronic copies of CONFIDENTIAL and RESTRICTED documents shall be kept in a safe place similar to printed documents and shall apply applicable security measures.
- All documents in printed format shall be converted into electronic format. Each Division shall identify, file, and organize all classified documents in their processing to facilitate easy storage and retrieval of documents.
- There shall be a centralized database, to be maintained by the Knowledge Management Division (KMD), which will contain/store voluminous documents in different electronic formats and that can be accessed, searched, and retrieved over the local network or even remotely over the Internet with proper security measures in place. A reliable full database backup shall be regularly maintained to guard against data loss and for easy recovery of documents.
- Each Division shall also maintain a database in its own storage that contains their documents and shall serve as

backup of their documents and shall apply appropriate security measures as may be determined by the KMD and consistent with pertinent laws and issuances on ICT.

4. **DOCUMENT REPRODUCTION.** The reproduction of Confidential and Restricted documents shall be cleared by the EXECOM.

5. **DISPOSAL OF CLASSIFIED DOCUMENTS**

5.1 All classified documents shall be disposed of legally in accordance with pertinent laws and other government issuances. The concerned official shall ensure that the disposal of such documents shall be systematic, authorized, and managed accordingly.

5.2 Spoiled/excess reproduced classified documents shall be disposed of by shredding.

5.3 Printed documents, electronic records, and ICT equipment that contain classified documents shall be disposed of in accordance with the policy of the National Archives of the Philippines, the PSRTI ICT Equipment Disposal Policy, and/or other pertinent laws and issuances.

5.4 Classified documents that shall be required for use in litigation or in any government inquiry shall be retained in accordance with disposition schedules prescribed by pertinent laws and issuances.

5.5 All classified documents may be digitized, as necessary, and stored until declassified, reclassified based on the recommendation of the EXECOM.

6. **ADMINISTRATIVE LIABILITY.** Without prejudice to any criminal case and civil case arising therefrom, the following are the administrative liabilities arising from any violation as follows:

Non-compliance with the existing rules and regulation and any unauthorized disclosure or misuse, sharing, publication or use of classified documents or materials shall be considered a grave offense, under Item No. 23, Sub-section A, Section 46.11, Rule X of Civil Service Commission (CSC) Revised Rules on Administrative Cases in the Civil Service, to wit:

"Disclosing or misusing confidential or classified document officially known to him by reason of his office and not available to the public, to further his/her private interests or give undue advantage to anyone, or to prejudice the public interest."

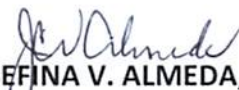
1st offense – Suspension (6 months to 1 year)

2nd offense – Dismissal

7. **MONITORING.** To ensure compliance with this Special Order, the following shall be implemented:

7.1 The Office of the Executive Director shall establish a request tracking system to trace the status of all requests for information. The tracking system shall include the actual number of hours utilized in processing the FOI requests.

- 7.2 The FAD CAO will submit a quarterly report to the Executive Director on all requests of classified documents from the Office of the President, national agencies, regional line agencies, legislative bodies, courts, quasi-judicial bodies, GOCCs, SUCs, special development bodies, local government units, funding institutions, and the private sector and other stakeholders.
- 7.3 The Executive Committee, which serves as the PSRTI Clearance Committee, in coordination with the Office of the Executive Director, shall submit an annual FOI report to the Office of the President through its Communications Office, containing the number of FOI requests received, granted, and denied, including the number of days and hours in the processing of the request.
8. **DOCUMENT INVENTORY.** Within the second quarter of 2017, all Divisions of the PSRTI shall conduct an annual inventory of documents in their custody during the preceding year. The inventory shall be submitted to the Office of the Executive Director. The files shall be made available to the public and to the EXECOM, upon request.
9. **PERIODIC REVIEW.** The FOI Guidelines and its accompanying documents shall be subject for review in December 2017, and every year thereafter.
10. **FINAL PROVISIONS.**
- 10.1 Funding of activities under this Special Order shall be charged to the Agency's regular budget.
- 10.2 This Special Order may be amended, revised or modified as necessary. If any of the provisions of this Special Order is declared invalid or unconstitutional, the validity of the remaining provisions hereof shall remain in force and in effect.
- 10.3 This Special Order shall take effect immediately.


JOSEFINA V. ALMEDA, Ph.D.
 Head of the Institute/Executive Director III

ANNEXES

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ANNEX A – LIST OF PSRTI DOCUMENTS

TITLE OF DOCUMENT	DESCRIPTION	DIVISION RESPONSIBLE
<i>CONFIDENTIAL DOCUMENTS</i>		
201 File	Includes Personal Data Sheet and all other-related personnel matters	FAD
Registration Form	Participants' profile containing background information	TD
Database of Participants	Personal information of the participants who attended the training courses	TD
<i>RESTRICTED DOCUMENTS</i>		
Research proposal/concept papers	Proposal for commissioned research prior to signing of MOA.	RD
Inception Reports	Implementation plan of approved commissioned researches.	RD
Presentation materials, research outputs	Technical outputs in line with addressing specific objective of the project. This includes framework technical description, survey manual, questionnaire, implementation plan, estimates/compilation and its methodology, information system, editing/archiving policy, survey results, data analysis, institutionalization plan, integration report, etc.	RD
Terminal/Technical Reports	Compilation of research outputs prepared by technical staff/consultants/partner agencies in line with the implementation of research project for submission to the partner agency/s	RD
Databases of commissioned researches	Databases of survey and FGD results, and Public Use Files (PUF) obtained from PSA and other NGAs, for data analysis and interpretation used for commissioned researches.	RD
Research evaluation results	Results of evaluation of research undertakings such as conference, workshops and FGDs. Parameters being evaluated include the	RD



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	performance of coordinator/facilitator, discussion, materials, food, etc.	
Student Internship Program Evaluation	Evaluation of students undergoing the on-the-job training rated by coordinators who served as supervisors during the SIP Implementation	RD and TD
Training materials	Presentation materials used in the conduct of training courses.	TD
Training Completion Reports of Customized Training Courses	Final reports submitted to clients for customized training courses.	TD
Evaluation of the training course	Evaluation of the training courses by the training participants	TD
Evaluation of resource persons	Evaluation of the resource persons by the training participants	TD
Evaluation of training participants	Individual scores of training participants in the pre-test and post-tests.	TD
Training concept papers	Training proposals/plans for customized training courses	TD
Office/Individual Performance Commitment Report	Commitment and performance evaluation that assesses the performance, accomplishment and contribution of an employee/office every semester using performance metrics	TD
Minutes of PSRTI Governing Board Meetings/Advisory Council	Summary of discussions, highlights and agreements	OED
Minutes of PSRTI Executive Committee Meetings	Summary of discussions, highlights and agreements	OED
Governing Board Resolutions	Formalization of PSRTI Governing Board decisions for implementation	OED
Meeting Materials (presented during Governing Board, Execom, etc.)	Compilation of presentation materials	OED
AVAILABLE TO THE PUBLIC		
Research Agenda	List of research topics to be undertaken. It also shows which sector in the recent Philippine Statistical Development Plan (PSDP)	RD



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	the topic belongs. Recent Research Agenda only includes those that PSRTI can implement for the current year.	
Completed in-house research studies	Research studies prepared by technical staff/consultants	RD
Memorandums of Agreement for Research Projects	Signifies partnership and collaboration of PSRTI with other agency/s to conduct research project and conferences with fund transfer. Integral parts are: concept paper, work plan and financial/project line item budget	RD
Memorandums of Understanding	Signifies partnership and collaboration of PSRTI with other agencies or higher education institutions to conduct research and/or training activities	RD
Student Internship Program (SIP) Outputs	Reports of outputs by students based on assigned research topics and training activities under the SIP.	RD and TD
PSRTI Thesis and Dissertation Fellowship Program Guidelines	Guidelines of the programs describing the process, requirements and selection criteria of application and benefits received	RD
Contracts of Thesis/Dissertation Fellows	Agreement between PSRTI and Thesis/Dissertation Fellows describing milestones to be delivered and the benefits/grants to be given by the Institute. It also includes sanctions in the event that the fellow is unable to satisfy the requirements.	RD
Thesis/Dissertation of Fellows	Thesis and Dissertation of Fellows under the PSRTI Thesis and Dissertation Fellowship Program	RD
Research outputs	Technical papers of commissioned and in-house researches	RD
Contracts of service	Agreement between consultants, experts and other personnel working for PSRTI commissioned research projects.	RD
Databases of in-house researches	Survey results or Public Use Files (PUF) obtained from PSA and other NGAs, as inputs for in-house researches. Access to the database follows rules of the source agency.	RD
Approved Information System Strategic Plan (ISSP)	ICT needs of the agency and corresponding fund requirement as	KMD



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	approved by MITHI covering three to five calendar years.	
Training Calendar	List of regular training courses and schedule offered for the current year	TD
Training Course Descriptions	Course coverage and objectives of the regular training courses offered for the current year.	TD
Memorandums of agreement for customized training courses	Signifies partnership and collaboration of PSRTI with other agency/s to conduct statistical capacity building activities with fund transfer.	TD
List of trainings conducted	List of training courses conducted including titles, number of participants and dates	TD
Technical Papers	Papers on statistical topics prepared by staff	TD
Statement of Assets, Liabilities and Networth (SALN) of PSRTI Officials and Employees	Assets and Liabilities and Networth of PSRTI employees.	FAD
Notice of Job Vacancies	Information on vacant positions in the PSRTI	FAD
Contract of services for essential services	Agreement between PSRTI and other parties relative to required essential services.	FAD
Plantilla	List of permanent employees describing position title, salary grade/step	FAD
Annual Budget	Budget approved for the agency's current year operations based on the National Expenditures Program	FAD
Budget Utilization Report	The report gives information on how the PSRTUI budget was utilized.	FAD
Financial Accountability Reports	Statement of Appropriations, Allotments, Obligations, Disbursements and Balances, Agency Budget Matrix (ABM) or Special Allotment Release Order (SARO/Sub-Allotment Release Orders, Prior Year's Obligations and Unpaid Prior Year's Obligations	FAD
Procurement Documents	Include PPMP, APP/CSE, PRs, RFQs, ITBs, AOCs, AOBs, PBDs, SBBs, and other related documents required for procurement	FAD
PSRTI Quality Manual	ISO - Quality Management System documentation for research and training processes	OED



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Audit findings and agency responses	Letters from the Commission on Audit's resident auditors on audit of accounts, operations or transactions and requiring comments thereto and/or submission of documentary and other information requirements and agency responses	FAD
PSRTI Governing Board Resolutions	Documentation of policies approved by the Governing Board	OED
Special Orders and Memorandums	Office-related activities and policies of the agency	OED

FAD - Finance and Administrative Division

KMD - Knowledge Management Division

OED - Office of the Executive Director

RD - Research Division

TD - Training Division



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ANNEX B - COVER SHEETS



REPUBLIC OF THE PHILIPPINES
PHILIPPINE STATISTICAL RESEARCH AND TRAINING INSTITUTE
Professional • Service-Oriented • Responsive • Team-based • Integrity



CONFIDENTIAL

This is a cover sheet

WARNING

The UNAUTHORIZED DISCLOSURE of INFORMATION contained in the ATTACHED DOCUMENT/S while not endangering national security will be PREJUDICIAL TO THE INTEREST OR PRESTIGE OF THE NATION, ANY GOVERNMENTAL ACTIVITY OR WILL CAUSE ADMINISTRATIVE EMBARRASMENT OR UNWARRANTED INJURY TO AN INDIVIDUAL, OR WOULD BE OF ADVANTAGE TO A FOREIGN NATION.

Responsibility of person/s handling the attached document/s:

1. **DO NOT LEAVE** THE DOCUMENT/S UNATTENDED EXCEPT WHEN PROPERLY SECURED.
2. **TRANSFER** THE DOCUMENT/S ONLY TO PERSONS WHO NEED TO KNOW AND WHO POSSESS THE REQUIRED SECURITY CLEARANCE.
3. IF SO REQUIRED, **OBTAIN A RECEIPT** WHENEVER RELINQUISHING CONTROL OF THE DOCUMENT/S.

Storage: SAFE or FILING CABINET PROPERLY LOCKED.

Reproduction: Copies maybe made of these documents except when the originating office has specifically stated that no copy shall be made without prior authority.

Disposition: This cover sheet need not be included when the original document is permanently filed.

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RESTRICTED

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WARNING

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Responsibility of person/s handling the attached document/s:

1. **DO NOT LEAVE** THE DOCUMENT/S UNATTENDED EXCEPT WHEN PROPERLY SECURED.
2. **TRANSFER** THE DOCUMENT/S ONLY TO PERSONS WHO NEED TO KNOW AND WHO POSSESS THE REQUIRED SECURITY CLEARANCE.
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Disposition: This cover sheet need not be included when the original document is permanently filed.

RESTRICTED



ANNEX C PROCEDURE FOR THE INTERNAL AND EXTERNAL ACCESS OF PSRTI DOCUMENTS

The following describes the procedure for requesting and accessing PSRTI documents from designated officers.

I. DESIGNATION OF A RECEIVING OFFICER (RO) OF ALL REQUESTS FOR DOCUMENTS FROM THE PUBLIC. The Chief Administrative Officer (CAO) of the Finance and Administrative Division (FAD) shall be designated as Receiving Officer (RO) for all requests for information from the public. In the performance of this duty, the FAD CAO shall comply with the identified duties and responsibilities and procedures described as follows:

1. **Preliminary Evaluation.** The RO shall conduct a preliminary evaluation of the request within 24 hours upon receipt thereof, based on any of the following:
 - 1.1.1 Completeness of the PSRTI FOI Request Form **(Annex D)**.
 - 1.1.2 Availability of the requested information/data/documents in the PSRTI Website or in the Open Data Website.
2. After the conduct of **preliminary evaluation**, the RO shall:
 - 1.2.1 Respond to the requestor with the proper link directing the requestor to the information/data/document if requested information/data/document is available in the PSRTI Website;
 - 1.2.2 Forward the request to the appropriate Division within 24 hours from receipt if complete in form and the information/ data/ document requested cannot be found in the PSRTI Website or Open Data Website;
 - 1.2.3 Inform the concerned Division if the document requested is CONFIDENTIAL or RESTRICTED, to which said Division will make an initial recommendation to release or deny the request within five (5) working days from receipt of request from the RO. The concerned Division will make a recommendation which includes a brief summary of information/data/document content, justification for the recommended action on the request and submits to the Executive Director for review and final decision. Only after and upon the final decision and confirmation from the Executive Director will the RO release the reply to the requested information.
 - 1.2.4 Reverts the request to the requestor based on a formal defect in the request, and a fresh 15 day period shall be observed from the receipt of the amended request;
 - 1.2.5 As necessary and in close coordination with the concerned Division, may seek an extension of the mandatory 15-working day period to respond to the request. However, any extension under this section shall not exceed twenty (20) working days.

1.2.6 Shall observe strictly the 15 working days from receipt of the request, and inform the requesting party of the action taken on said request.

II. TRANSFER TO CONCERNED DIVISION. The concerned Division shall, assess and classify the requested document/s based on internal classifications, within two days, and submit for endorsement to the Executive Director for approval/denial. Procedure is as follows:

1. No request is needed for the following, which are classified as Available to the Public documents:
PSRTI publications and their electronic copies; and
Documents available and/or posted in the website;
2. For confidential and restricted documents, the concerned Division, within a maximum of five (5) working days after categorization of the documents under their responsibility, and as approved by the Executive Director shall provide the required information;
3. The concerned Division shall maintain second copies of request for information and other documents relevant to the issuances of such clearances; and
4. Endorse either a "denial" or approval" decision to the Executive Director on the basis of its assessment and review.

III. DECISION OF THE EXECUTIVE DIRECTOR. Within two days of receipt of endorsement from the concerned division, the Executive Director will do one the following:

1. Confirm/approve endorsement of request for release of the RO; or
2. Deny requested document for release of the RO; or
3. Revert request for further review or consideration of concerned Division.

The flowchart (**PSRTI FLOWCHART of ACCESS TO PSRTI DOCUMENTS**), at the end of this document, shows the graphical procedure in accessing PSRTI documents.

IV. PSRTI DOCUMENTS AS CLASSIFIED. The complete list of classified PSRTI documents is in Annex A. These are tagged as Available to the Public, Restricted and Confidential.

- 4.1 **Available to the Public.** These are available PSRTI publications/documents that are either printed or with electronic copies; and posted in the website.
- 4.2 **Restricted and Confidential.** These are not readily accessible/available and can only be requested by observing the PSRTI-FOI Guidelines. The concerned Division within a maximum of five (5) working days after categorization of the documents under their responsibility and as approved by the Executive Director shall provide the required information for confidential and restricted documents.

- V. HANDLING OF REQUESTS FROM VARIOUS SOURCES.** The following requests will be handled as described:
- 5.1 Inter-Division Requests.** Without prejudice to the liabilities under item 6. Administrative Liability of PSRTI Special Order 17-062, the Executive Director, upon determination of the importance/urgency of the request, may, at his/her discretion immediately release the CONFIDENTIAL or RESTRICTED document to the requesting personnel.
- 5.2** In case of requests made in the regular and normal course of business, the following procedures shall be adopted:
- 5.2.1** Any PSRTI personnel interested to secure documents from another PSRTI Division shall fill out a request form and submits to the RO.
- 5.2.2** Upon receipt of the request, the RO will confer with the concerned Division Chief, to:
- Determine the purpose of the request;
 - Determine if the document is in the possession of the unit/s under his/her jurisdiction; and
 - Validate the classification of the requested document.
- 5.2.3.** Upon determination of the provisions under 5.2.2, the concerned Division Chief may approve or deny the request of the PSRTI personnel. In case of denial, rules on Section VIII. Appeal Process will be observed.
- 5.3 Requests from National Government Agencies.** Any National Government Agency (NGA) interested to secure any document from PSRTI shall file their letter request or request form, signed by the Head of their Agency and addressed to the PSRTI Executive Director through mail, facsimile and electronic email. The RO shall transmit the request, within three (3) working days from receipt thereof, to the concerned Division, which shall recommend to the Executive Director the approval or denial of the request for the document, based on these guidelines. The Executive Director shall have final determination to approve or deny a request for documents.
- 5.4 Requests from Judicial /Quasi-Judicial Bodies.** The PSRTI shall provide any document subject of a subpoena issued in accordance with the Rules of Court and other applicable law/rules and regulations. The PSRTI may seek legal advice from the NEDA Legal Staff, if feasible. Legal consultation may also be made with the appropriate government entity.
- 5.5 Requests from Legislative Bodies.** The RO shall initially identify the level of classification of the document based on the PSRTI Classification of Documents (Annex A). If the document is identified as CONFIDENTIAL or RESTRICTED, the RO shall refer the request to the concerned Division(s), who shall immediately provide the requested



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documents to the Executive Committee for clearance and final approval of the Executive Director. The concerned Division shall process the documents and prepare the transmittal letter to the requesting body, within the specified period.

5.6 Requests from the Private Sector. The RO, shall receive the request for information from the requesting party and check compliance with the requirements listed in the PSRTI Freedom of Information Application Request Form (**Annex D**).

5.7 How to make requests. Requests can be made through the following:

5.7.1 Through email, provided that the requesting party shall attach in the email a scanned copy of the completely filled-out Freedom of Information Application Request Form (Annex D), and a copy of a valid government-issued ID (i.e., driver's license, SSS ID, passport) with photo. In case of email requests directly coursed through PSRTI staff, the concerned entity shall forward the request to the RO for initial evaluation.

5.7.2 Through oral/verbal manner, in case of inability of the requesting party to make a written request arising from illiteracy or a physical disability, the RO shall prepare the request in writing.

5.8 Receiving requests. The request shall be stamped received by the FAD, indicating the following: (i) date and time of the receipt of the written request, and (ii) name, rank, title and position of the public officer who actually received it, with a corresponding signature and a copy, furnished to the requesting party.

5.8.1 In case of email requests, the email shall be printed out and the procedure mentioned above shall be followed.

5.8.2 For requests sent through mail, an acknowledgment letter shall be sent to the requestor.

5.8.3 All requests shall be entered into the PSRTI Request Tracking Monitoring Log and assigned a reference number, which shall be given to the requestor upon acceptance of request.

5.8.4 The acknowledgment/response to a request must be sent within a period sufficient for the RO to conduct an initial evaluation of the request, with special consideration of the mandatory fifteen (15) working-day period to dispose of a request. For requests where clarificatory questions are sent to the requestor, the 15-day period shall be reckoned on the date when the RO receives the requestor's answer to the query.

5.8.5 If the RO reverts the request to the requestor based on a formal defect in the request, a fresh 15 day period shall be observed from the receipt of the amended request.

5.8.6 If the requested information/data/document is available in the PSRTI Website or in the Open Data Website of a partner-agency,



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- the RO shall respond to the requestor with the proper link directing the requestor to the information/data/document.
- 5.8.7 If the request is complete in form and the information/ data/ document requested cannot be found in the PSRTI Website or Open Data Website, the RO shall forward the request to the appropriate Division within 24 hours from receipt of the same.
- 5.8.8 If the document requested is CONFIDENTIAL or RESTRICTED, the concerned Division shall provide an initial recommendation to release or deny the request within five (5) working days from receipt of request. The RO shall then evaluate the concerned Division's recommendation which includes a brief summary of information/data/document content, and the justification for the recommended action on the request and report to the Executive Committee for final decision.
- 5.8.9 Responses to requests for information shall use the Request Granted or Request Denied Forms (**Annex E**).

VI. DOCUMENTS NOT IN THE PSRTI CLASSIFICATION OF DOCUMENTS

- 6.1. In cases when the requested document is not included in the PSRTI Classification of Documents, these shall be referred to the Executive Committee for the determination of the level of classification thereof, with approval from the Executive Director.
- 6.2. **Procedure to follow.**
- 6.2.1. Within five (5) working days from receipt of the request the RO shall acknowledge receipt of the request, and shall refer the request to the Executive Committee.
- 6.2.2. Within five (5) working days from receipt of referral from the RO, the Executive Committee shall convene and decide on the request within 15 working days, on the availability and level of classification of the requested document.
- 6.2.3. The Executive Director shall then approve or deny the request, in accordance with the recommendation and endorsement of the EXEOM.
- 6.2.4. Within 15 working days from receipt of the request, the requesting party shall be informed of the action taken on his/her request.
- 6.2.5. The Executive Committee, may create its internal rules in classification of documents that are not included in the PSRTI Classification of Documents under the PSRTI Freedom of Information Guidelines.

- VII. COST OF REPRODUCTION.** The PSRTI may charge a reasonable fee to reimburse actual cost of reproduction and communication of the information requested. Charges for certified copies and certifications shall be collected in accordance with existing laws and regulations.

VIII. APPEAL PROCESS.

- 8.1. The denial of a request may be appealed within 15 calendar days from notice of denial or from the lapse of the period to respond to the request.
- 8.2 The Appeal shall be in writing, addressed to the following:
- PSRTI Appeals Committee
7th Floor South Insula Condominium, 61 Timog Avenue,
Barangay South Triangle, Quezon City, 1103 Philippines
Telefax: (632) 288-4948/245-1067/929-7543/288-4150/426-
0620/245-1093/920-9649
<http://psrti.gov.ph>
- 8.3 The Appeals Committee, shall be composed of the Division Chiefs, and will evaluate the appeal and submit its recommendation to the Executive Director who will render the final decision on the Appeal.
- 8.3.1 All Appeals shall be resolved within 15 working days from receipt of the same.
- 8.3.2 The denial of the appeal may be further appealed to the Office of the President pursuant to Administrative Order No. 22, S. 2011.
- 8.3.3 Upon exhaustion of administrative appeal remedies, the requesting party may file the appropriate judicial action in accordance with the Rules of Court.



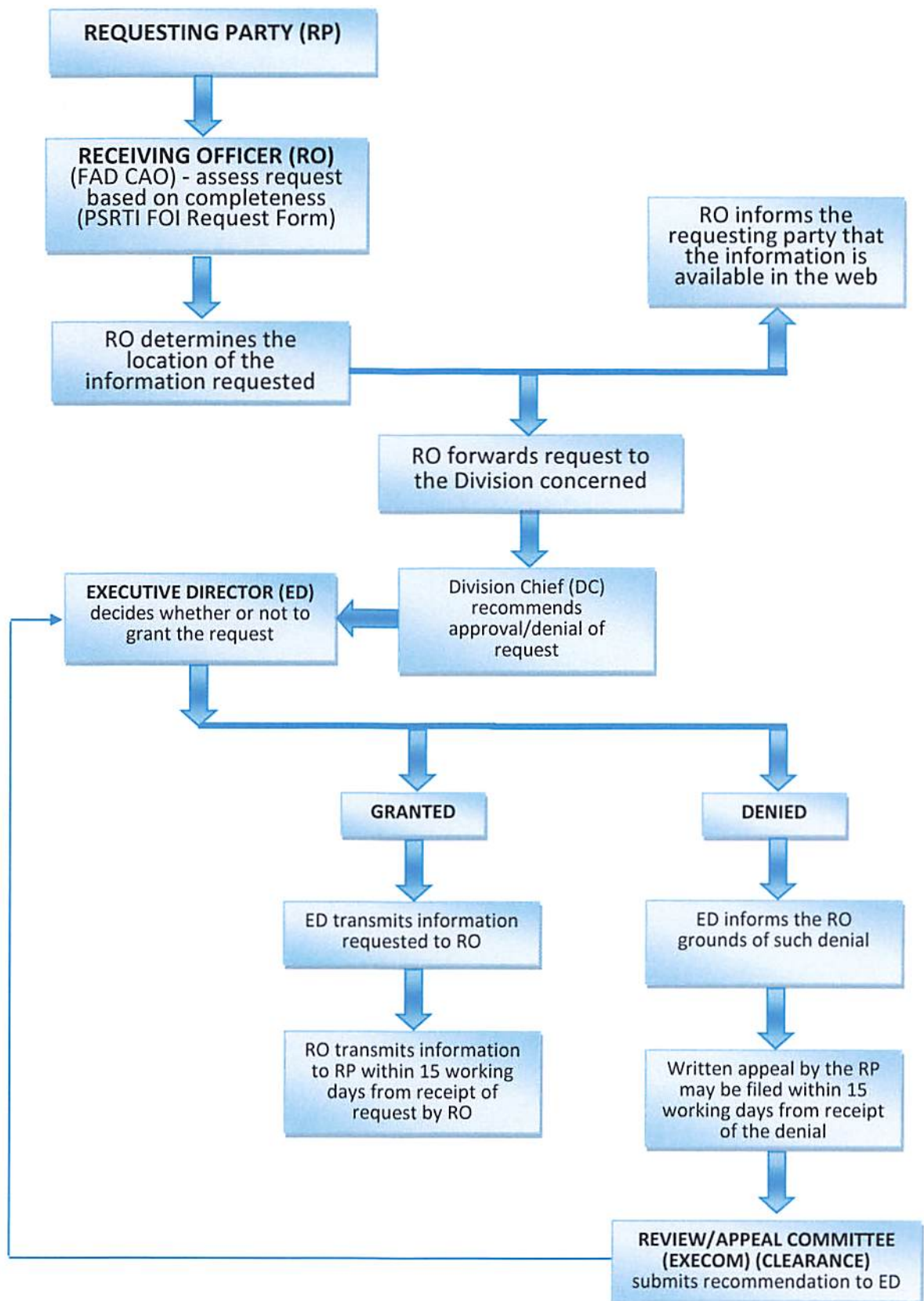
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PSRTI FLOWCHART of ACCESS TO PSRTI DOCUMENTS
 (Procedure for the Internal and External Access of Requested PSRTI documents)



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ANNEX D - PSRTI FOI REQUEST FORM



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PSRTI Tracking Number: _____

Freedom of Information Application Request Form (Compliance to Executive Order No. 2, Series of 2016)

The requesting party is **REQUIRED** to **read carefully** and fill-out the following information before proceeding with the request application. Tick or mark boxes with "X" where necessary. Mandatory fields are marked with ■ and must be answered completely.

COST OF REPRODUCTION. The PSRTI may charge a reasonable fee to reimburse actual cost of reproduction and communication of the information requested. Charges for certified copies and certifications shall be collected in accordance with existing laws and regulations.

Dear FOI Receiving Officer:

This is a request under the Freedom of Information Act described in Executive Order No. 2, Series of 2016, "Operationalizing in the Executive Branch the People's Constitutional Right to Information and the State Policies to Full Public Disclosure and Transparency in the Public Service and Providing Guidelines therefor."

- I am requesting a copy of the following document/s (or document/s containing the information) be provided to me described/indicated hereat (please be very specific with the information needed):

I am (select one) Tick or mark boxes with "X":

- ☐ An individual seeking information for personal use.
- ☐ Affiliated with an educational institution and this request is made for a scholarly purpose.
- ☐ Affiliated with a private corporation and seeking information for use in the company's business.
- ☐ A representative of the news media/press and this request is made as part of news gathering and not for commercial use.
- ☐ Affiliated with a public interest group (non-government organizations, etc.) and this request is not for commercial use.
- ☐ Others, please specify: _____.



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■ My information/contact details are:

First Name	
Middle Name	
Last Name	
Complete Residence Address	
Zip Code	
Complete Residence Address	
Zip Code	
Phone Contact Number/s	
Residence	Landline: Cellular:
Business	Landline: Cellular:
Email Address (provide a business and personal emails, please)	
Scanned copy of identifications provided (only government issued IDs are allowed - passport, driver's license, company ID, GSIS/SSS, etc.)	
Date Request was filed	

	Tick or mark appropriate boxes with "X"
☐ Request was submitted personally	

- Request was submitted via email with this application scanned and attached together with valid and acceptable IDs.

Requested by: Signature over printed name	I am making an oral request and requested assistance of your receiving officer in making my request.	RIGHT THUMBMARK HERE PLEASE
--	---	--



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=====FOR RECEIVING OFFICER ONLY=====

Forwarding this request to Division concerned based on the following:

DESCRIPTION		REMARKS/ Tick or mark with "X"
1.	Completeness of form of the FOI request (pursuant to Section 5.1.1. of the Annex B of the PSRTI FOI GUIDELINES)	
	○ The request form was made in writing and all information filled-out;	
	○ The request stated the name and contact information of the requesting party, as well as provide valid proof of identification or authorization	
	○ The request reasonably described the information requested, and the reason for, or purpose of, the request for information	
2.	The request was made via email and requesting party attached in the email a scanned copy of the FOI application request, and a copy of a valid government-issued ID (i.e., driver's license, SSS ID, passport) with photo.	
3.	The request/s was/were coursed through PSRTI staff, and forwarded to the FAD Chief/Receiving Officer for initial evaluation.	
4.	The requesting party made an oral request due to physical challenges, and the FAD Chief/Receiving Officer prepared the request in writing.	
5.	The request was stamped received by the FAD on ▪ date and time of the receipt	_____ _____
	▪ name, rank, title and position of the PSRTI staff who actually received it, with a corresponding signature and a copy, furnished to the requesting party	
	▪ properly acknowledged/responded as received via snail mail or email	
6.	PSRTI reference/tracking number provided for	

Endorsed/Forwarded by:

Received by:

LOLITA M. OREO
FOI Receiving Officer

Name:

Division:

**Note: To be returned to FAD/FOI
Receiving Officer five (5) working days
after receipt**



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ANNEX E - REQUEST GRANTED OR DENIED FORMS

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REQUEST GRANTED

PSRTI Tracking Number: _____

Date:

Name of Requester

Address

Subject : Request for Information on: _____

Dear _____:

This is with regard to your request dated _____, with reference PSRTI Tracking Number shown above, seeking information on _____, pursuant to Executive Order No. 2 on Freedom of Information in the Executive Branch.

We are pleased to provide you with the necessary information/documents as enclosed. Should you require a hard copy of your request, a minimal fee of _____ will be charged to cover photocopying services which you may settle with the PSRTI Cashier. An official receipt will also be issued after payment has been made.

Thank you very much.

Very truly yours,

JOSEFINA V. ALMEDA, Ph.D.
Head of the Institute/Executive Director III

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ANNEX E
REQUEST for DATA AVAILABLE ONLINE

PSRTI Tracking Number: _____

Date:

Name of Requester
Address

Subject : Request for Information on: _____

Dear _____:

This is with regard to your request dated _____, with reference PSRTI Tracking Number shown above, seeking information on _____, pursuant to Executive Order No. 2 on Freedom of Information in the Executive Branch.

We are pleased to share with you the online link _____ where you can find the needed information.

Thank you very much.

Very truly yours,

JOSEFINA V. ALMEDA, Ph.D.
Head of the Institute/Executive Director III



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ANNEX E
REQUEST DENIED/CONFIDENTIAL/ANOTHER AGENCY'S INTEREST

PSRTI Tracking Number: _____

Date:

Name of Requester

Address

Subject : Request for Information on: _____

Dear _____:

This is with regard to your request dated _____, with reference PSRTI Tracking Number shown above, seeking information on _____, pursuant to Executive Order No. 2 on Freedom of Information in the Executive Branch.

After a careful evaluation of your request, we regret to inform you that we cannot grant the needed information due to:

Should you wish for a review of this denial, you may file a written appeal with the PSRTI FOI Appeals Committee, within fifteen (15) days after perusing/viewing the information. The appeal shall be acted upon by the PSRTI FOI Appeals Committee within thirty (30) days from receipt thereof. If still unsatisfied with the results of the appeal, you can file another appeal to the Office of the President as per Executive Order No. 02, Operationalizing in the executive branch the people's constitutional right to information and the state policies to full public disclosure and transparency in the public service and providing guidelines therefore.

Thank you very much.

Very truly yours,

JOSEFINA V. ALMEDA, Ph.D.

Head of the Institute/Executive Director III



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