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JB PRITZKER Governor MARIO TRETO, JR.
Secretary

CECILIA ABUNDIS
Director

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#### **Social Equity Criteria Data Point Primer**

This Primer is intended to assist applicants for the Social Equity Criteria Lottery, a new application and lottery process pursuant to 68 IAC 1291. 400, available <a href="https://example.com/here">here</a>. For more information on this application and lottery process, please review the Department's <a href="https://example.com/here">Social Equity Criteria Lottery Steps</a> and <a href="https://example.com/here">Acceptable Documents Guide</a>.

In order to be issued a conditional license pursuant to this application process, a top participant<sup>1</sup> must prove, amongst all other statutory requirements<sup>2</sup> and limitations<sup>3</sup>, that it is 51% or more owned or controlled by one or more individuals who each meet the combination of at least one of the criteria under Criteria A and one of the criteria under Criteria B. This does not mean multiple individuals need to meet identical criteria, but each individual accounting for the 51% or more ownership must individually meet at least one criterion from Criteria A and one criterion from Criteria B. In other words, if there are 3 proposed individuals that collectively make up 51% of the ownership of a top participant entity, Individual 1 needs to meet 1 criterion from Criteria A and 1 criterion from Criteria B, and Individual 3 needs to meet 1 criterion from Criteria A and 1 criterion from Criteria B.

In order to be eligible for a conditional license in the above scenario, the top participant must prove to the Department for each individual making up 51% ownership:

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<sup>&</sup>lt;sup>1</sup> Pursuant to 68 IAC 1291.10, "Top participant" means an applicant drawn by lot in a winning slot such that it has the opportunity to be issued a conditional license.

<sup>&</sup>lt;sup>2</sup> See Section 15-36 of the Cannabis Regulation and Tax Act and review the current <u>15-36 Application</u> for other statutory, operational-based requirements which are required in order to be issued a full 15-36 License.

<sup>&</sup>lt;sup>3</sup> Pursuant to 410 ILCS 705/15-30(k), no single person or entity may have a direct or indirect financial interest in more than 10 Early Approval Adult Use Dispensing Organization Licenses, Conditional Adult Use Dispensing Organization Licenses, or Adult Use Dispensing Organization Licenses. Any entity that is awarded a conditional license that results in a single person or entity having a direct or indirect financial interest in more than 10 licenses shall forfeit the most recently issued license and suffer a penalty to be determined by the Department in accordance with section 15-145 of the Act, unless the entity declines the license at the time it is awarded. 68 IAC 1291.420(n). Pursuant to 68 IAC 1291.95(a), if the Illinois Department of Revenue determines a principal officer is not compliant, the Department will notify the principal officer via e-mail and the principal officer will have 60 days to provide proof of compliance from the Illinois Department of Revenue or the applicant will be denied the Conditional License and the next drawn applicant from the lottery will be notified of its eligibility for a Conditional License. The Department must deny all of the applicant entity's Conditional Licenses if one or more principal officers is unable to come into compliance within the timeframe provided in 68 IAC 1291.95(c). In addition to those listed, the Department may deny an applicant's Conditional License for any other reason allowed by law.

- 1. The individual's home address is within the eligible census tract in Criteria A;
- 2. The individual resided at the home address for a total of 5 of the past 10 years; (see Social Equity Criteria Acceptable Documents Guide to prove residency); and
- 3. The individual qualifies under one of Criteria B's requirements.

An individual can prove eligibility with multiple addresses in multiple census tracts for 5 of the past 10 years, so long as each census tract is eligible under one of Criteria A's options. In other words, an individual is not require to have lived at the same address for all 5 years, but if there are multiple addresses, each must qualify in the appropriate census tract. Further, an individual address' census tract qualifies if the locations *currently* meet the eligibility criteria (e.g., a person lived from 2015-2020 at an address in a census tract qualifying using the 2021 Census Bureau 5-year surveys).

Remember, if a top participant has multiple individuals who make up the 51% ownership or control of the entity, the top participant needs to prove the above three bullet points for each individual.

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# Criteria A and Criteria B

### <u>Criteria A</u> See 68 IAC 1291.410(e)(6)(A)

i) An individual who has resided for at least 5 of the preceding 10 years in a census tract that has a poverty rate of at least 20% according to the latest 5-year American Community Survey (Table S1701: Poverty Status in the Past 12 Months) that is publicly available at the start of the application submission window for the lottery conducted under Sections 1291.400 through 1291.440. The data set is available at

https://data.census.gov/cedsci/table?q=poverty%20rate&g=0100000US%241400000&tid=ACSST5Y2020.S1701:

NOTE: The link above is from the 2020 5-year American Community Survey. The rules require the most recent 5-year survey, which was recently updated by the Census Bureau to reflect 2021 instead of 2020. Therefore, all applicants must use the 2021 survey. Please follow the directions below on page 5, particularly Step 3, for selecting the 2021 5-year ACS Survey. The result should be this data:

https://data.census.gov/table?q=poverty+rate&g=0100000US\$1400000&tid=ACSST5 Y2021.S1701

ii) An individual who has resided for at least 5 of the preceding 10 years in a census tract where at least 20% of the households receive assistance under the Supplemental Nutrition Assistance Program in the latest 5-year American Community Survey (Table S2201: Food Stamps/Supplemental Nutrition Assistance Program (SNAP)) that is publicly available at the start of the application submission window for the lottery conducted under Sections 1291.400 through 1291.440. The data set is available at <a href="https://data.census.gov/cedsci/table?q=snap%20participation&g=0100000US%241400000&tid=ACSST5Y2020.S2201">https://data.census.gov/cedsci/table?q=snap%20participation&g=0100000US%241400000&tid=ACSST5Y2020.S2201</a>;

NOTE: The link above is from the 2020 5-year American Community Survey. The rules require the most recent 5-year survey, which was recently updated by the Census Bureau to reflect 2021 instead of 2020. Please follow the directions below on page 7, particularly Step 3, for selecting the 2021 5-year ACS Survey. The result should be this data: https://data.census.gov/table?q=snap+participation&g=0100000US\$1400000&tid=AC SST5Y2021.S2201

- iii) An individual who has resided for at least 5 of the preceding 10 years in a census tract area classified as "low income and low access" where at least 100 households are more than one-half mile from the nearest supermarket and have no access to a vehicle or a significant number (at least 500 people) or share (at least 33%) of the population is greater than 1 mile from the nearest supermarket, supercenter, or large grocery store for an urban area or greater than 20 miles for a rural area, as classified by the latest United States Department of Agriculture Economic Research Service's Food Access Research Atlas data set that is publicly available at the start of the application submission window for the lottery conducted under Sections 1291.400 through 1291.440. The data set is available at the United States Department of Agriculture Economic Research Service's Food Access Research Atlas, is available at <a href="https://www.ers.usda.gov/data-products/food-access-research-atlas/go-to-the-atlas;">https://www.ers.usda.gov/data-products/food-access-research-atlas/go-to-the-atlas;</a>
- iv) An individual who has received Medicaid, Supplemental Security Income, Social Security Disability, and/or subsidized housing for at least 5 of the preceding 10 years; and/or,

v) An individual who has resided for at least 5 of the preceding 10 years in a census tract in the top 15<sup>th</sup> percentile for the percent of residents in the census tract failing to graduate from High School in that state, as classified by the latest 5-year American Community Survey (Table S1501: Educational Attainment) that is publicly available at the start of the application submission window for the lottery conducted under Sections 1291.400 through 1291.440. The data set is available at <a href="https://data.census.gov/cedsci/table?q=s1501&q=0100000US,%241400000">https://data.census.gov/cedsci/table?q=s1501&q=0100000US,%241400000</a>

NOTE: The link above is from the 2020 5-year American Community Survey. The rules require the most recent 5-year survey, which was recently updated by the Census Bureau to reflect 2021 instead of 2020. Please follow the directions below on page 14, particularly Step 3, for selecting the 2021 5-year ACS Survey. The result should be this data: https://data.census.gov/table?g=s1501&g=0100000US,\$1400000&tid=ACSST5Y2021.S1501

#### Criteria B See 68 IAC 1291.410(e)(6)(B)

- i) An individual who has been arrested for, convicted of, or adjudicated delinquent for any offense, or substantially similar offense, of Illinois, federal or other state law for:
  - possession of not more than 500 grams of cannabis; or
  - manufacture, delivery, or possession with intent to deliver, or manufacture of cannabis up to 30 grams;
- ii) An individual who has a family member who has been arrested for, convicted of, or adjudicated delinquent for any offense, or substantially similar offense, of Illinois, federal, or other state law for:
  - · possession of not more than 500 grams of cannabis; or
  - manufacture, delivery, or possession with intent to deliver, or manufacture or cannabis up to 30 grams.
- iii) An individual who has been a victim of firearm injury, as those terms are defined in this Part. This must be evidenced by either a police report or medical record.

A top participant must demonstrate its majority owners meet at least one option from Criteria A and one option from Criteria B to qualify as a Social Equity Applicant under this new process. Four of the five Criteria A options (i, ii, iii, and v) require an individual to have lived for five of the preceding ten years in a qualifying census tract. Census Tracts are the geographic regions tracked by the U.S. Census Bureau with usually about 4,000 inhabitants. They are redrawn after every decennial census and the Census Bureau includes many demographic and socio-economic measures by census tract.

Criteria A(i), A(ii), and A(v) use the American Community Survey, a detailed survey by the U.S. Census Bureau that covers the entire country. The criteria use five-year surveys—data is collected over five years to provide the most precise and detailed estimates even for areas with low populations—for poverty rates of 20% or more of the census tract (Criteria A(i)), Supplemental Nutrition Assistance Program of 20% or more

of the tract (Criteria A(ii)), high school attainment in the bottom 15% of the state of the census tract (Criteria A(v)). The bullets below explain how to use each Census dataset.

Criteria A(iii) uses the U.S. Department of Agriculture Economic Research Service's Food Access Research Atlas, a research project to identify areas of limited food access. Criteria A(iii) identifies "low income and low access" areas where at least 100 households are more than one-half mile from the nearest supermarket and have no access to a vehicle or a significant number (at least 500 people) or share (at least 33%) of the population is greater than 1 mile from the nearest supermarket, supercenter, or large grocery store for an urban area or greater than 20 miles for a rural area.

#### **Criteria A Interactive Map**

This <u>interactive map</u> allows individuals to check if an individual address is within a census tract that qualifies for one of the required social equity criteria. The Department encourages all individuals to utilize this helpful map as they prepare their applications.

The map combines the most recent data from the 5-year American Community Survey (ACS) and the USDA's Economic Research Service's Food Access Research Atlas.<sup>4</sup>

## To use the map:

• Type in an address or city in the upper lefthand corner to zoom into a specific location.

If you do not know the address, use one of these search methods:

- Click the search box and type in an address or choose **Use current location**
- Click within the map using the plus "+" or minus "-" buttons to zoom in/out or the home button
- Use the blue "Clear search location" to select another location or reset the map

The information box will display whether the location meets one of the Social Equity Criteria.

- If the "Social Equity Criteria Eligibility Result(s)" displays a "1," the location meets that criteria
- If the "Social Equity Criteria Eligibility Result(s)" displays a "0," the location does not meet that criteria
- If no social equity criteria options are met, a warning bar will appear saying "The address entered does not fall within any criteria"

While the interactive map is meant to serve as a helpful resource, it should not interpreted as legal advice or as a legal conclusion. Applicants may wish to confirm the information by checking their census tract for themselves following the directions for Criteria A below. Should an applicant be selected as a top participant in the Social Equity Criteria Lottery, the Department will confirm that the applicant's address(es) meet the criteria.

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<sup>&</sup>lt;sup>4</sup> As of January 12, 2023, the 2021 5-year American Community Survey was the most recent and used for Criteria A(i), A(ii), and A(v). The USDA's 2019 Food Access Research Atlas was the most recent and used for Criteria A(iii).

## **How to Find Your Census Tract**

If not using the user-friendly, interactive map

- 1. Go to https://geocoding.geo.census.gov/geocoder/geographies/address?form
- 2. Type in your address; keep all the default settings for Benchmark/Vintage, and click "Get Results"
- 3. Find your Census Tract by scrolling to the bottom:

Census Tracts:

STATE CODE: 17

CENTLON: -087.6426203

GEOID: 17031281900

**CENTLAT:** +41.8792477

COUNTY CODE: 031

**TRACT CODE: 281900** 

AREAWATER: 17458

**AREALAND:** 421030

NAME: Census Tract 2819

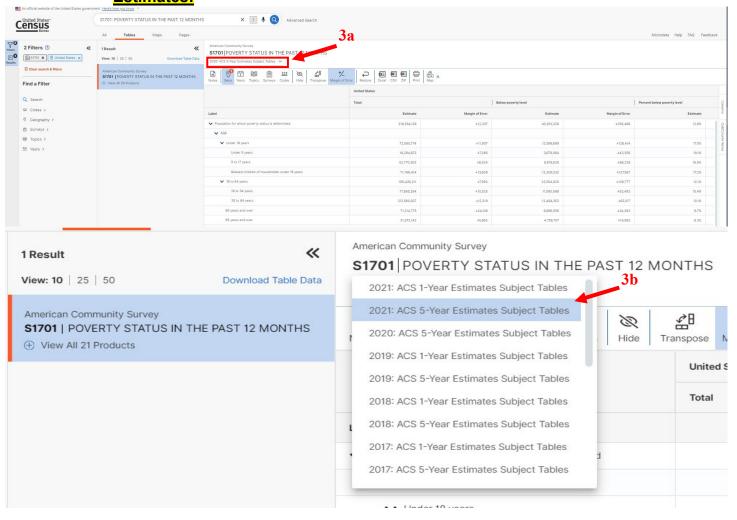
- 4. The GEOID is a unique identifier for your location. The NAME is your Census

  Tract. Both can be used in the searches below.
- 5. For the purposes of this document, the Department is using its office, 555 W. Monroe, Chicago, Illinois 60661, (Census Tract 2819) as a helpful example.

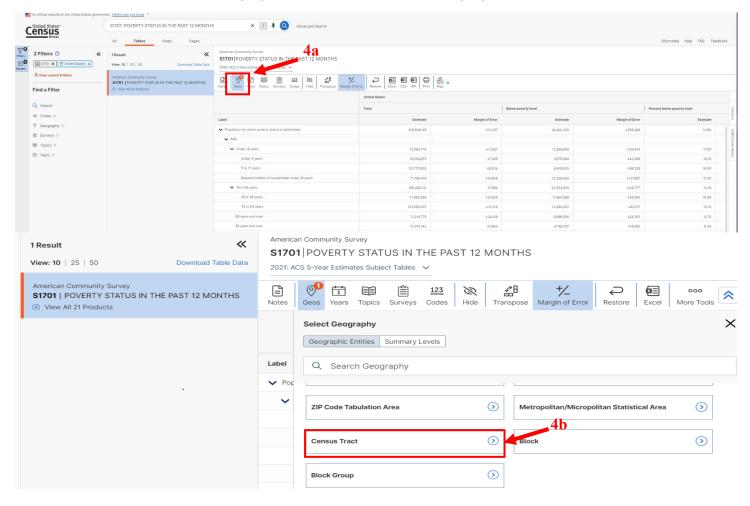
#### Criteria A(i): Poverty Level Census Tract

- Criteria A (i): 20% or more Below the Poverty Level in the Census Tract
  - 1. Go to data.census.gov
  - 2. In the search bar, type: S1701: Poverty Status in the Past 12 Months
  - 3. Click on the dropdown menu (3a) to select the most recent ACS 5-Year Estimates (3b)

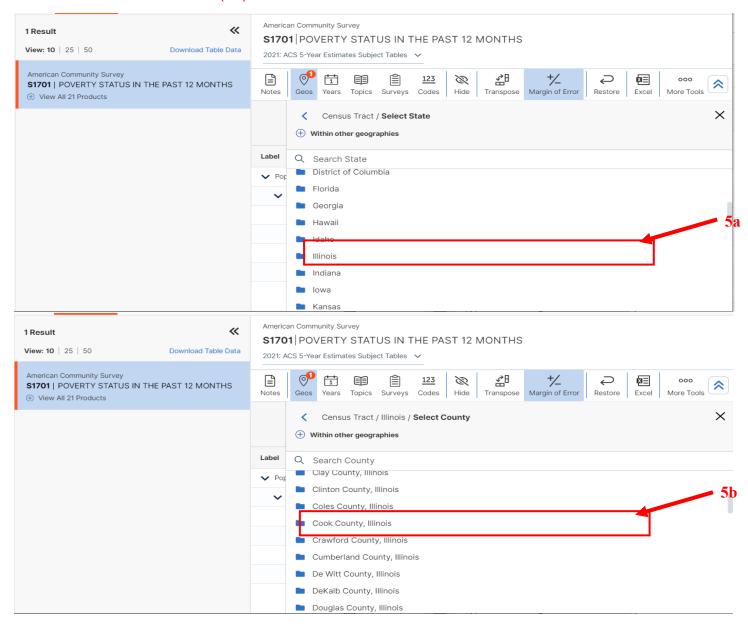
NOTE: don't forget this step to make sure you have 2021's ACS 5-Year Estimates!

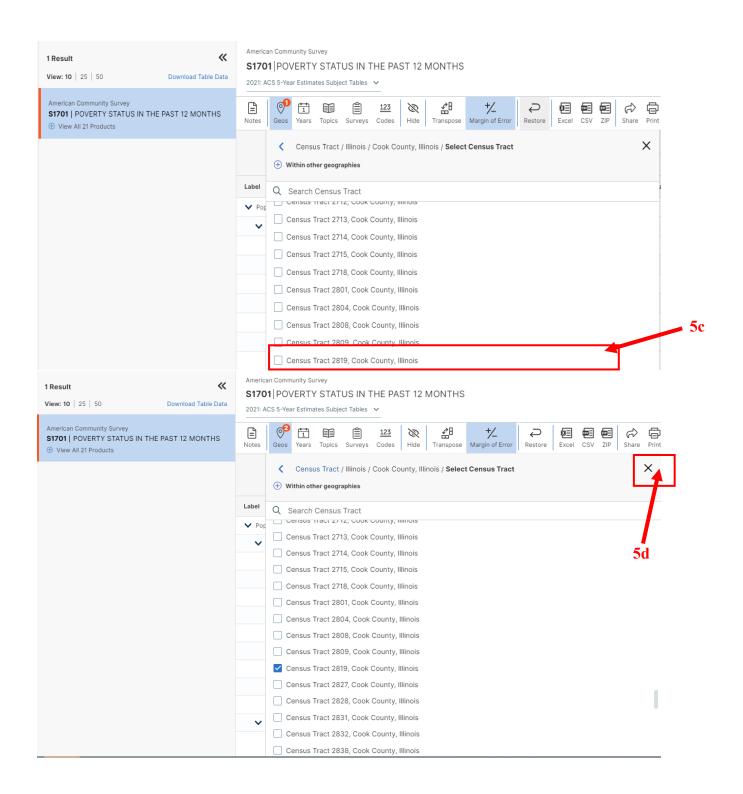


4. Click on "Geos" (4a) and select "Census Tract" (4b)

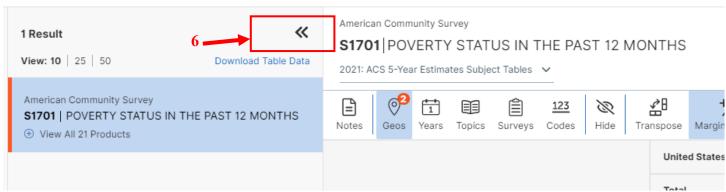


5. Select the State (5a), then County (5b), then Census Tract (5c) of the residence, then click "X" (5d).



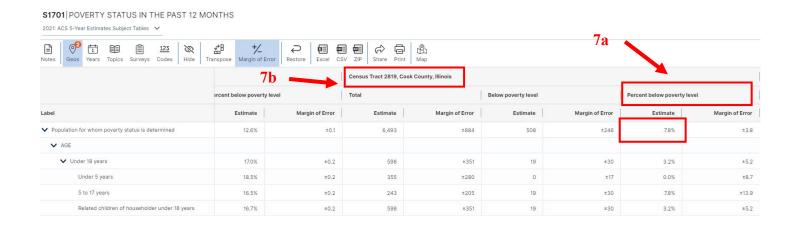


6. Click the double arrows (<<) to expand the table



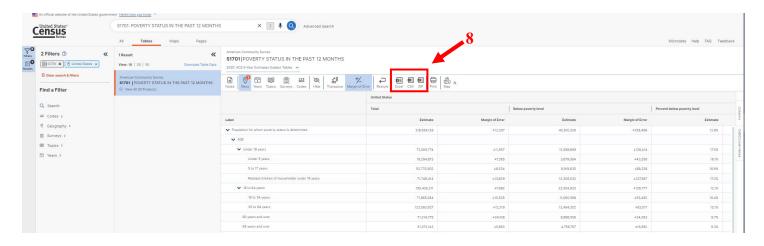
7. You must then scroll to the right of the table until you see "Percent below poverty level" column (7a) for your selected Census Tract (7b). This then is the percentage to compare whether it is equal to or greater than 20%.

Note: if you download the data in Excel, CSV, or Zip, the "Percent below poverty level" is under the column named "S1701 C03 001E."



\*The Department's address is in a census tract that has a poverty level of 7.8%. Because this is less than 20% as required by the rules, this particular census tract would not satisfy Criteria A(i).

8. You may then download the data (click the Excel, CSV, or Zip icons) to keep a record of your results. The Department will accept Excel, CSV, or zip file formats of this data. Please clearly label the data file using the follow title format: LAST NAME\_First Name\_CensusTractData.

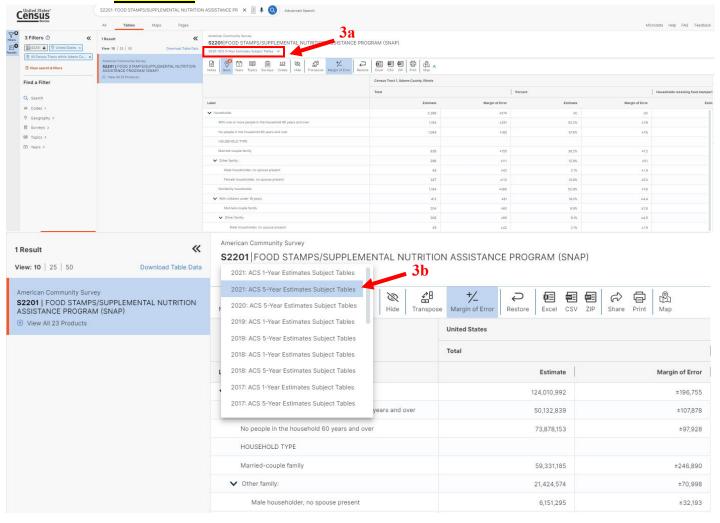


Note: If you wish to reset your filters, use the filters column on the far left of your screen.

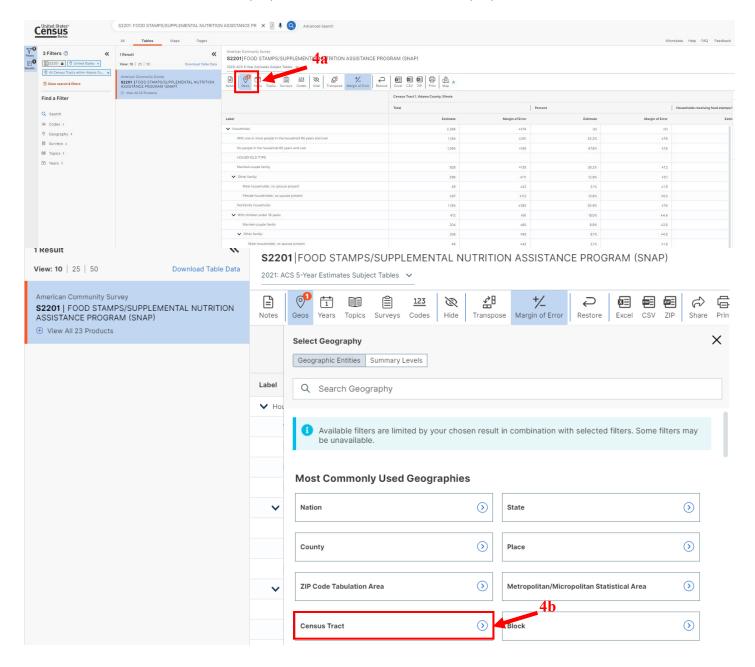
#### Criteria A(ii): SNAP Census Tract

- Criteria A (ii): 20% or more receiving assistance under the Supplemental Nutrition Assistance Program the Census Tract
  - 1. Go to data.census.gov
  - 2. In the search bar, type: S2201: Food Stamps/Supplemental Nutrition Assistance Program (SNAP)
  - 3. Click on the dropdown menu (3a) to select the most recent ACS 5-Year Estimates (3b)

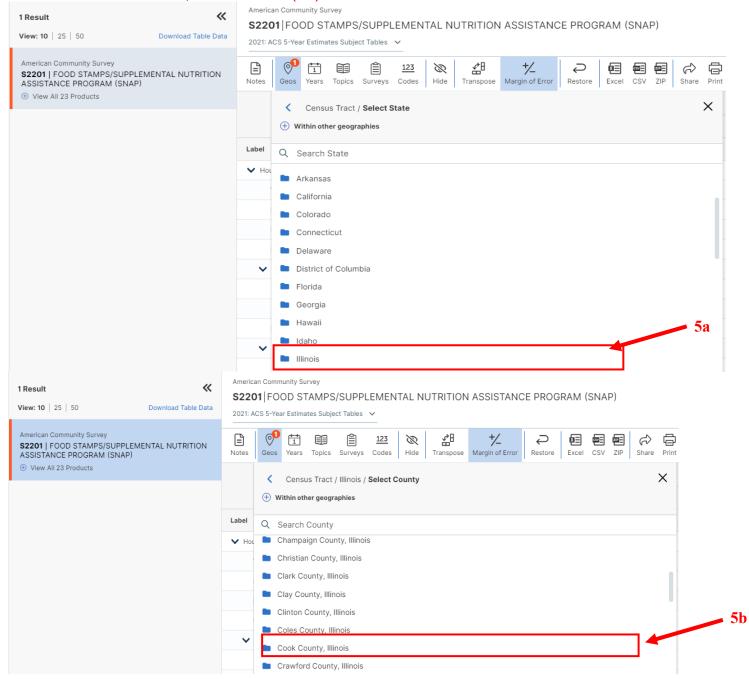
NOTE: don't forget this step to make sure you have 2021's ACS 5-Year Estimates!

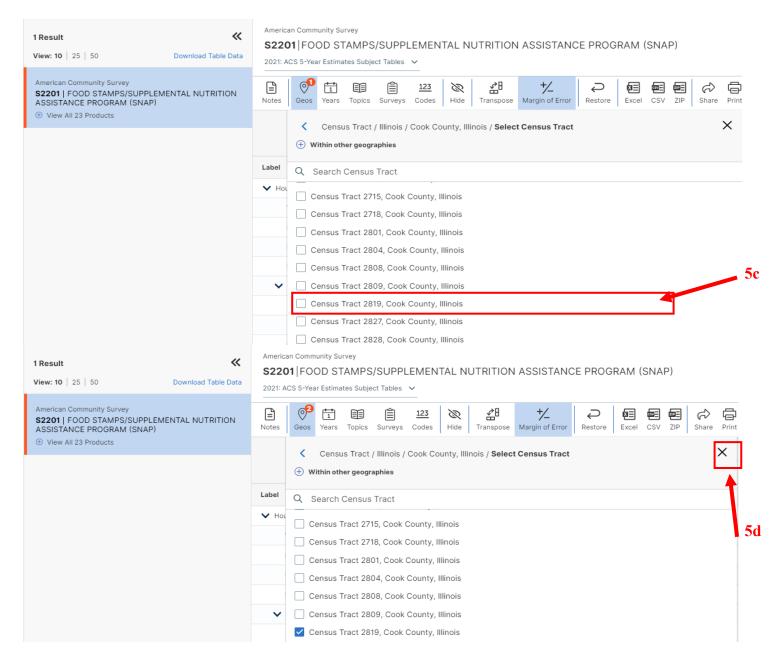


4. Click on "Geos" (4a) and select "Census Tract" (4b)

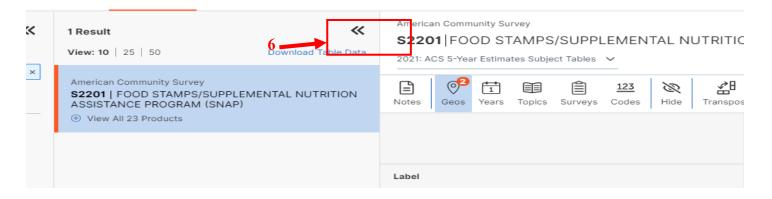


5. Select the State (5a), then County (5b), then Census Tract (5c) of the residence, then click "X" (5d).



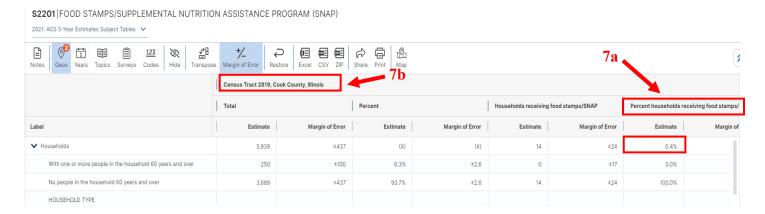


#### 6. Click the double arrows (<<) to expand the table



7. You must then scroll to the right of the table until you see "Percent households receiving food stamps/SNAP" column (7a) for your selected Census Tract (7b). This then is the percentage to compare whether it is equal to or greater than 20%.

**Note:** if you download the data in Excel, CSV, or Zip, the "Percent households receiving food stamps/SNAP" is under the column named "**\$2201\_C04\_001E**."



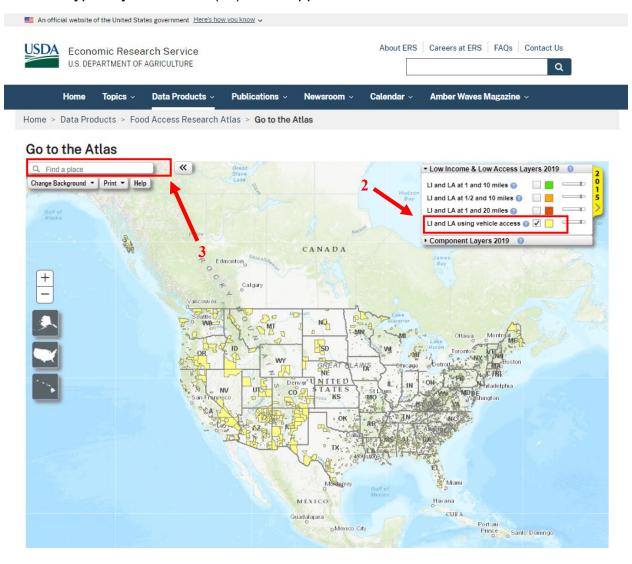
\*\*The Department's address is in a census tract that has a percent households receiving food stamps/SNAP of 0.4%. Because this is less than 20% as required by the rules, this particular census tract would not satisfy Criteria A(ii).

8. You may then download the data (click the Excel, CSV, or Zip icons) to keep a record of your results. The Department will accept Excel, CSV, or zip file formats of this data. Please clearly label the data file using the follow title format: LAST NAME\_First Name\_CensusTractData.

Note: If you wish to reset your filters, use the filters column on the far left of your screen.

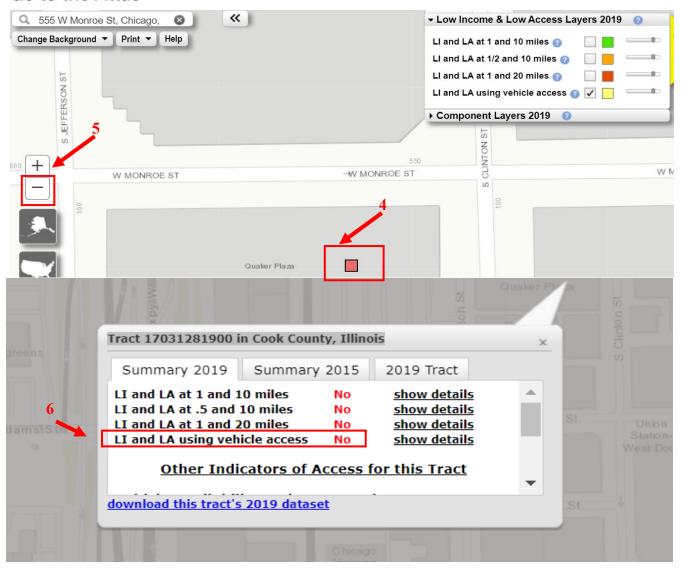
## Criteria A(iii): Food Desert Census Tract

- Criteria A (iii): Low income and Low access to food
  - 1. Go to <a href="https://www.ers.usda.gov/data-products/food-access-research-atlas/go-to-the-atlas">https://www.ers.usda.gov/data-products/food-access-research-atlas/go-to-the-atlas</a>
  - 2. Select "LI and LA using vehicle access" in the legend; make sure no other boxes are selected.
  - 3. Type in your address(es) in the upper left box and hit enter



- 4. Click on the red square, which should be your address. A pop-up box should appear.
- 5. Review the pop-up box. If the last line reading, "LI and LA using vehicle access," has a "No" beside it, the tract does not qualify. If there is a "Yes" beside the line, the address does qualify for Criteria A(iii).

## Go to the Atlas



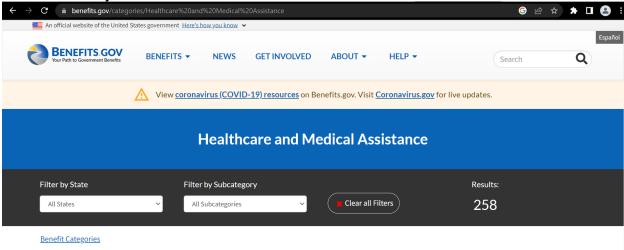
\*\*The Department's address is in a tract that has a "No" beside line "LI and LA using vehicle access." Because of this, the tract would not satisfy Criteria A(iii).

# <u>Criteria A(iv): Medicaid, Supplemental Security Income, Social Security Disability, and/or Subsidized Housing</u>

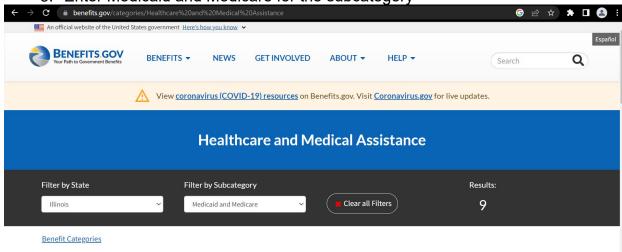
 Criteria A (iv): received Medicaid, Supplemental Security Income, Social Security Disability, and/or subsidized housing for at least 5 of the preceding 10 years

## 1. For individuals receiving Medicaid:

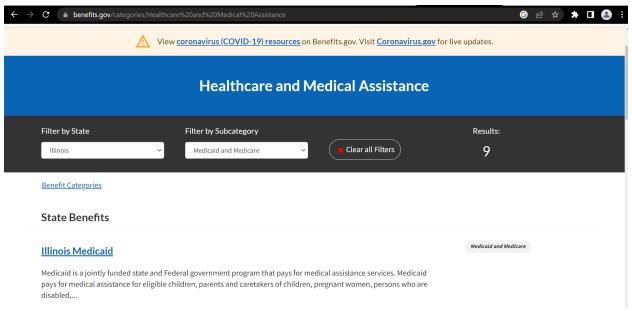
- 2. Enter your state



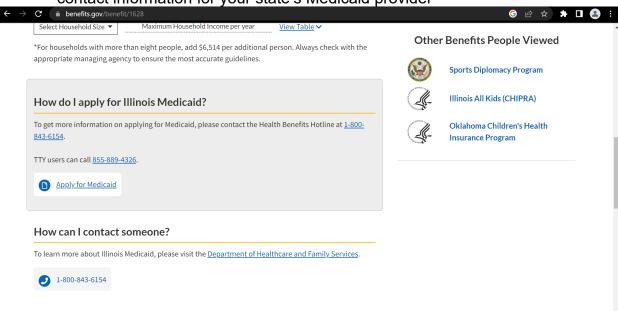
3. Enter Medicaid and Medicare for the subcategory



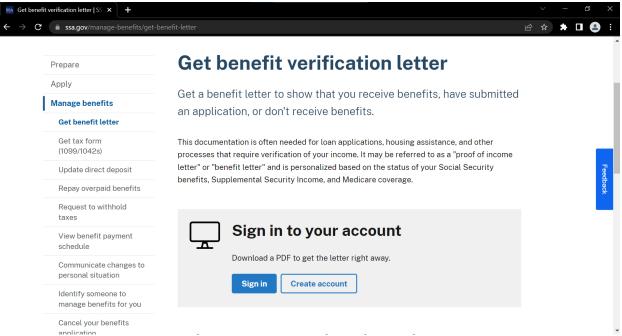
4. Click on the link under State Benefits



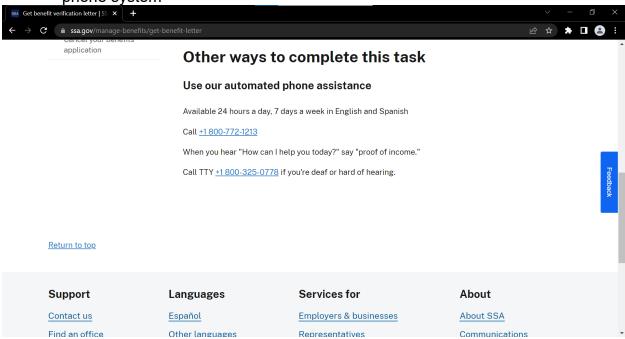
5. Find the "How Can I Contact Someone" towards the bottom of the page for contact information for your state's Medicaid provider



- 6. Obtain copies of your eligibility determination letters or Medicaid cards for the applicable years and save as PDF files.
- 2. Supplemental Security Income (SSI) and Social Security Disability Income
  - 1. Visit <a href="https://www.ssa.gov/manage-benefits/get-benefit-letter">https://www.ssa.gov/manage-benefits/get-benefit-letter</a>
  - 2. Sign into your account if you have one and print off your eligibility letter

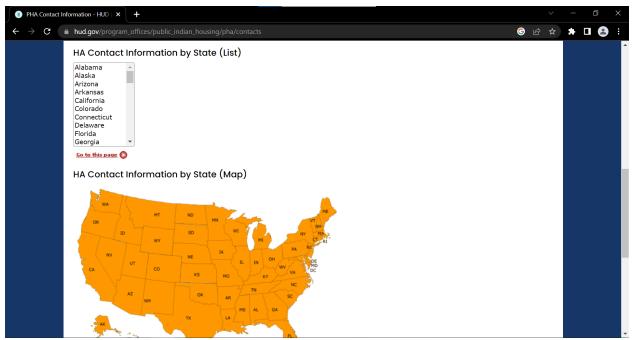


- 3. Download and save a PDF copy of the letter.
- 4. If you do not have an account through SSA.gov, you can utilize their automated phone system



## 3. Subsidized Housing

- 1. Visit https://www.hud.gov/program offices/public indian housing/pha/contacts
- 2. Find your state either in the list or on the provided map and click "Go to this page":



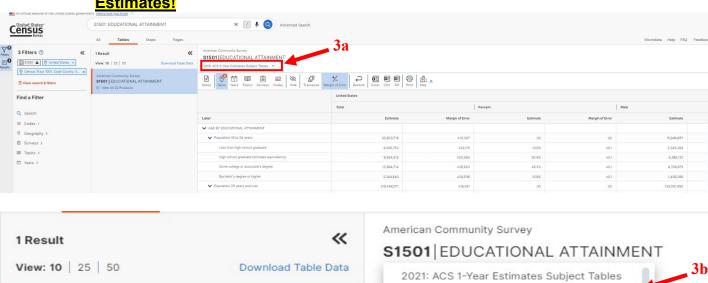
3. Find the housing authority for your area and contact them to discuss obtaining an eligibility letter, voucher history, or other acceptable documentation listed in the Acceptable Documents Guide

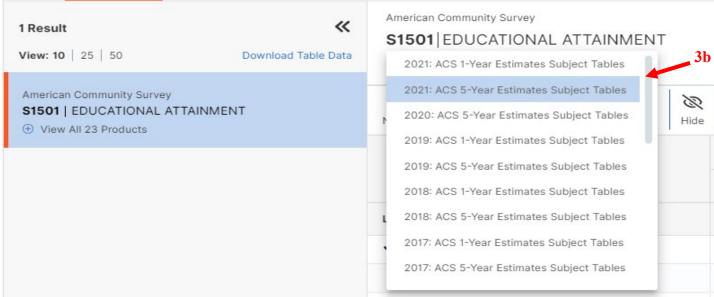
# Criteria A(v): High School Graduation Tract

Criteria A (v): top 15<sup>th</sup> percentile for the percent of residents in the census tract failing to graduate from High School in that state

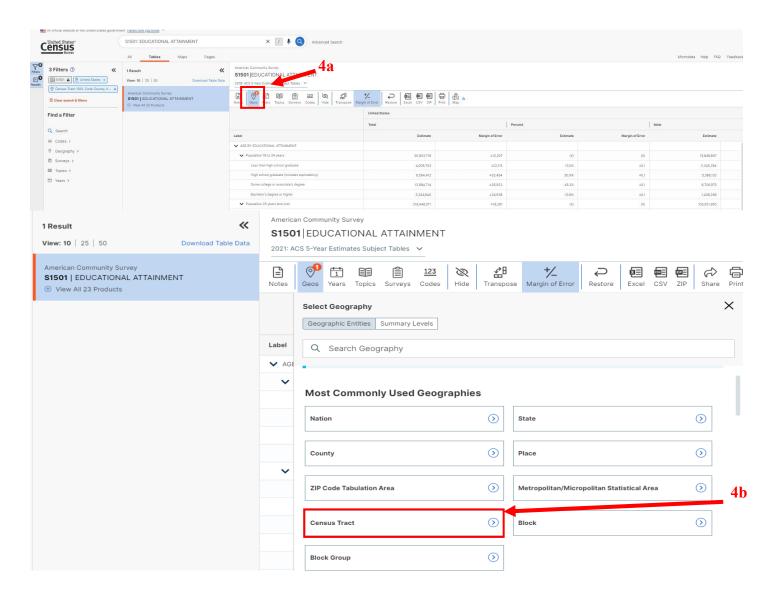
- 1. Go to data.census.gov
- 2. In the search bar, type: S1501: Educational Attainment
- 3. Click on the dropdown menu (3a) to select the most recent ACS 5-Year Estimates (3b).

NOTE: don't forget this step to make sure you have 2021's ACS 5-Year Estimates!

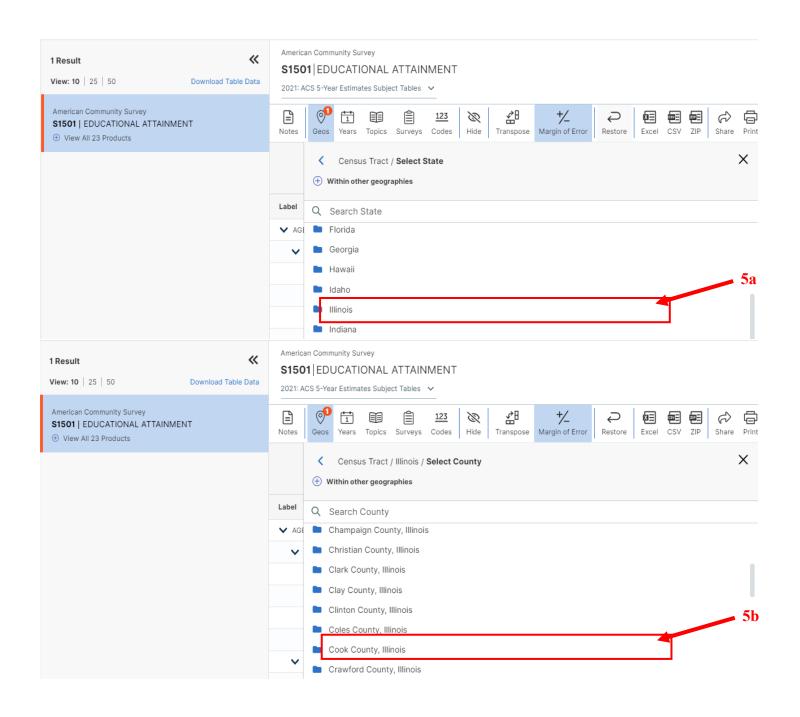


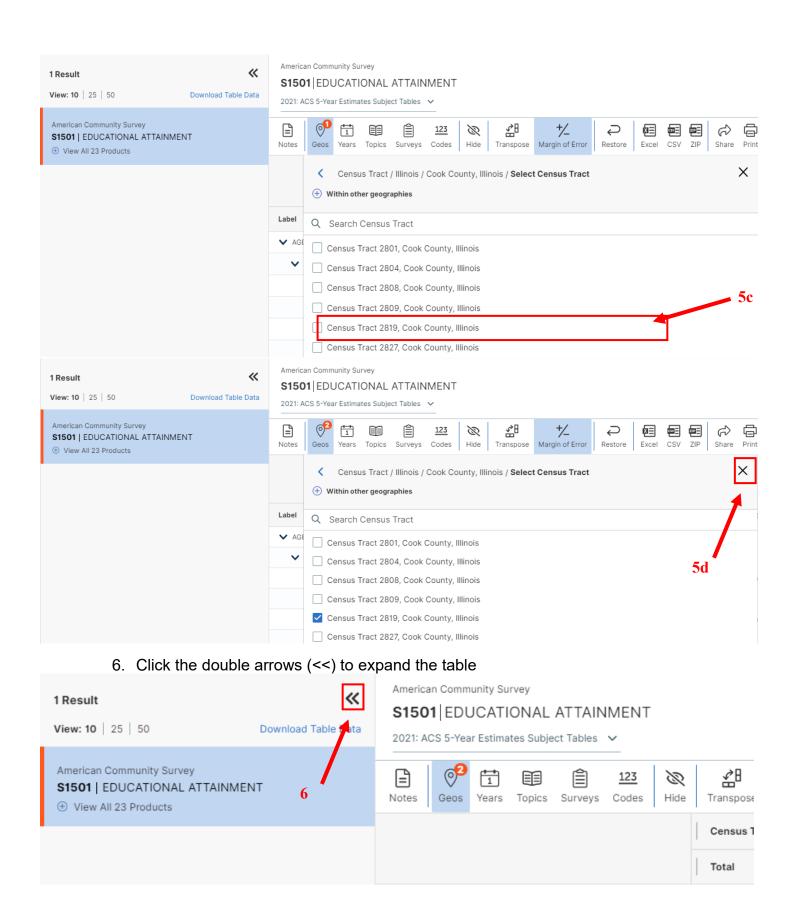


4. Click on "Geos" (4a) and select "Census Tract" (4b)



5. Select the State (5a), then County (5b), then Census Tract (5c) of the residence, then click "X" (5d).





7. You must then calculate the percent without a high school/high school equivalent degree in a specific Census Tract:

First, add the rows:

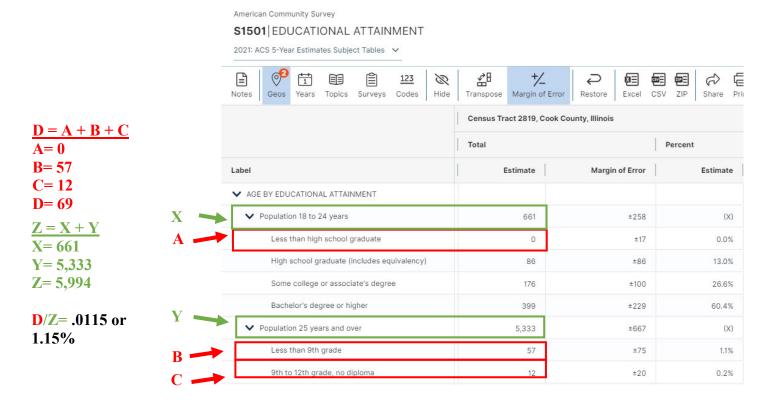
- A. "Population 18 to 24 years: Less than high school graduate" (S1501\_C01\_002E) *plus*
- B. "Population 25 years and over: Less than 9<sup>th</sup> grade" (S1501\_C01\_007E), *plus*
- C. "Population 25 years and over: 9<sup>th</sup> to 12<sup>th</sup> grade, no diploma" (S1501\_C01\_008E)
- D. D = A + B + C; the sum equals the number of people 18 and older who have less than a high school or high school equivalent education

#### Second, add the rows:

- X. "Population 18 to 24 years" (S1501\_C01\_001E) plus
- Y. "Population 25 years and over" (S1501\_C01\_006E)
- Z. Z = X + Y; the sum equals the total number of people 18 and over in each Census Tract

Third, dividing the number of people with less than a high school or equivalent education by the total people over 18 equals the percent to compare to the table below.

d / z = the percent of people 18 and older who have less than a high school or high school equivalent education



8. Compare the sum calculated above to the lowest 15<sup>th</sup> percentile of your state. The table below shows the percentile cutoff for each state from the <u>ACS 5-Year 2021</u> Educational Attainment survey. If your number is equal to or greater than the percent below, your census tract qualifies.

State	15 <sup>th</sup> Percentile	State	15 <sup>th</sup> Percentile
Alabama	21.9%	Missouri	17.5%
Alaska	11.7%	Montana	11.0%
Arizona	24.7%	Nebraska	14.6%
Arkansas	20.9%	Nevada	23.8%
California	30.3%	New Hampshire	11.7%
Colorado	15.4%	New Jersey	19.2%
Connecticut	18.0%	New Mexico	24.8%
Delaware	15.8%	New York	23.2%
District of Columbia	16.3%	North Carolina	20.2%
Florida	20.8%	North Dakota	11.8%
Georgia	22.3%	Ohio	17.8%
Hawaii	11.3%	Oklahoma	19.5%
Idaho	15.7%	Oregon	15.1%
Illinois	19.7%	Pennsylvania	15.5%
Indiana	19.3%	Puerto Rico	30.8%
lowa	12.7%	Rhode Island	19.0%
Kansas	17.0%	South Carolina	21.6%
Kentucky	22.4%	South Dakota	14.3%
Louisiana	24.0%	Tennessee	19.7%
Maine	11.6%	Texas	30.6%
Maryland	16.7%	Utah	13.4%
Massachusetts	18.4%	Vermont	10.3%
Michigan	16.0%	Virginia	17.3%
Minnesota	11.8%	Washington	15.2%
Mississippi	23.3%	West Virginia	19.6%
Missouri	17.5%	Wisconsin	13.0%
Montana	11.0%	Wyoming	12.0%

Illinois'  $15^{th}$  percentile is 19.7%. The calculations from the previous page equate to 1.15% (D/Z). 1.15% is less than 19.7%. Therefore, this particular census tract would not satisfy Criteria A(v).

Note: if you wish to compare the table's thresholds, these values are calculated in Excel by using each state's percent of people in a census tract failing to graduate from High School at the 85th percentile. For each state, the Excel function is:

=PERCENTILE([all of state tracts' Percentages without a high school/equivalent degree],0.85)

9. You may then download the data (click the Excel, CSV, or Zip icons) to keep a record of your results. The Department will accept Excel, CSV, or zip file formats of this data. Please clearly label the data file using the follow title format: LAST NAME\_First Name\_CensusTractData.

Note: If you wish to reset your filters, use the filters column on the far left of your screen.

## Criteria B: Interaction with Criminal Justice System

#### How to obtain the documentation necessary to prove Criteria B:

- **Police reports and arrest records** will be held by the police department that performed the arrest.
  - To obtain a copy, contact the arresting police department's records division and ask how to obtain a copy of the police report and any arrest records.
  - olf you are unsure of which police department performed the arrest, you may wish to contact a public aid attorney to assist you in obtaining a criminal background.
  - o All copies of records should be saved as PDF documents.
- Records of convictions can be obtained from the clerk of the court in the county you were convicted in.
  - To obtain a copy, you can either call the courthouse in the county you were convicted in or visit the courthouse in person and request the clerk of the court's office.
  - If you are unsure of which county you were convicted in, you may wish to contact a legal aid attorney to assist you in obtaining a criminal background.
  - o All copies of records should be saved PDF documents.
- For <u>Pardons and Expungements</u>, applicants will need to provide evidence of a pardon or expungement, either state or federal.
  - o All copies of records should be saved PDF documents.
- <u>Medical records</u> can be obtained from the hospital or healthcare provider who treated you
  - To obtain copies, contact the hospital or healthcare provider's records department and ask about obtaining copies.
  - o If you are unsure of which hospital or healthcare provider treated you, you may wish to contact your primary care provider for assistance in determining your healthcare history.
  - o All copies of records should saved as PDF documents.