AD HOC REPORT REQUEST

> To the Requestor:
>
> For accurate production of reports, all information must be entered in the administrative information area and the selection criteria area. Also, please be sure to indicate any special instructions.

ADMIN. INFORMATION

Requestor's Name: _____   E-mail: _____

Department: _____   Phone: _____

Date of Request: _____   Date Required: _____

Purpose of Report: _____

_____

Number of copies: _____

Frequency of production: ☐ Once ☐ Biweekly ☐ Monthly ☐ Quarterly ☐ Annually

Transfer information: ☐ Pickup ☐ E-mail ☐ Campus mail

TYPE OF REQUEST

☐ **REPORT/DATA EXTRACT**

Date range: ☐ Current Year ☐ Prior Year From: _____   To: _____

Fields to appear on the report
listed in order of appearance: Sort Order:

1. _____   1. _____

2. _____   2. _____

3. _____   3. _____

4. _____   4. _____

5. _____

6. _____

SELECTION CRITERIA

(Check all that apply in each criterion.)

Category:

- ☐ Faculty
- ☐ Staff
- ☐ Major Admin.
- ☐ General Admin.
- ☐ Non-Fringe
- ☐ Post-Doc. Fellow

Group:

- ☐ Full-time
- ☐ Part-time
- ☐ Temporary
- ☐ Grad. Asst.
- ☐ Fellow
- ☐ Student
- ☐ Emeritus

Schools:

- ☐ College of Arts & Sciences
- ☐ College of Engineering
- ☐ Dentistry
- ☐ Nursing
- ☐ Applied Social Sciences
- ☐ Law
- ☐ Management
- ☐ Medicine

Special Instructions: _____

_____

_____

Report contains confidential information: ☐ Yes ☐ No   If yes, request must by authorized by supervisor below.

Name: _____ Title: _____

_____ / _____
Supervisor's Signature   Date

Please return completed form to:

Human Resources Information Specialist
Department of Human Resources
304 Crawford Hall
LC: 7047   Fax: (216) 368-4678

AD HOC REPORT INSTRUCTIONS

The Department of Human Resources (HR) is responsible for supporting the Case administration in the preparation of address labels and/or address lists of Case employees. This HR information is considered by the University administration to be confidential and is only released for official purposes on a need-to-know basis. Requests for the release of this information must be made on the appropriate request form. If you have difficulties after drafting your information needs based on the following notes, please do not hesitate to contact HR by phone at 216-368-5049, or by e-mail at james.e.ryan@case.edu.

Information to consider before completing the request form:

1. The purpose for which you wish to use the information.

2. The "target population" that you wish to contact.

3. THE REQUESTOR INFORMATION, at the top of the form. This area needs to be filled out in full in order to facilitate the completion of the request.

4. TYPE OF REQUEST, identifies the type of request.

    A. LABELS - If this is a label request there is no need to fill out any more information than the first two lines. Labels may be requested for campus or home addresses, or both. Be sure to fill in number of copies in the administrative information area. Requests for home addresses must be accompanied by signed approval by the Dean or Corporate Officer from every division / school for which the request is made. A signed approval is not required for campus addresses if the requestor can verify an appropriate need.

    B. REPORTS (data extracts) If this is a report/data extract request, please indicate under report/data extract request what information (such as name, address, hire date) must be included. The difference between a report and a data extract is the delivery of the information. A report will be produce on paper. A data extract will be produced on disk in a format that can be imported into other software packages.

5. SELECTION CRITERIA. This identifies the population to be included. Mark clearly each area that needs to be included on the report or for the labels.

6. A space is provided at the bottom of the form to identify any other requirements for the labels or reports. Not all such special needs can be met due to the nature of the data. Where requests are very specialized, consideration should be made for development and completion of the task.