Ad Hoc Data Request Form

General Ad Hoc Request Information

This form is used to request university data that is not currently accessible via other means for one-time or periodic use. Requests should be submitted as soon as a need is known. Please allow three weeks whenever possible to complete standard requests, as approvals are needed and other requests are already in the queue, and more complex or involved requests may take longer.

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Primary Requester Information

Requester Name:		Email Address:	
Department/College:		Phone(s):	
Role:	Faculty Staff Student Assistant Other:		

Additional Recipient Information

The data you receive is NOT to be shared with any other individual or internal/external entities unless they are listed below.

Other Recipients:	

Purpose of Request

Please describe what you will do with the data your are requesting. Please provide enough detail to determine if your request should be approved.

Purpose:

Time Frame

Today's Date:	Desired Date:

Please provide your comments below if any of the following conditions exist:
• Your desired date is less than three weeks from today's date
• You have a specific reason that you need this data by a certain date
• Your request should not be processed until an event occurs, such as registration or grading

Comments:

General Information

Type of information needed:	☐ Aggregate/Statistical/Trend ☐ Detailed (per person, enrollment, etc.)
Frequency needed:	☐ One time only ☐ Quarterly ☐ Annually ☐ Other:
Same data requested previously:	☐ No ☐ Yes: **Most recent request ID#:**
Any changes to previous request:	☐ No ☐ Yes - Describe:

PLEASE NOTE: If you are requesting data that you personally have requested previously, and there are no changes other than: 1) The time period covered has changed 2) The courses to be included have changed; then you may forgo this form and send an email to records-stu-data-rqst@calpoly.edu, indicating the prior request ID# if known, and the new time period or courses, if applicable.

Intention to Send Email Communication

Please indicate whether you intend to send email communication(s) as a result of this request:

☐ Yes, and I estimate that I will be sending email to 1,000 or more recipients.
   • Review large mailing policies at: http://servicedesk.calpoly.edu/content/email_calendar/massmail/procedure
   • Contact ITS (it-policy@calpoly.edu) for more information and approval

☐ Yes, and I estimate that I will be sending email to less than 1,000 recipients.

☐ Yes, but I'm not sure if how many recipients I will have (we suggest following procedures for more than 1,000).

☐ No, I do not plan to send any email communications.

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Population Selection - Type	
Please provide information on the types of individuals or other records you would like information about. Please select ONLY ONE Population Type per request.	
Population	☐ Applicants or New Students (have not yet attended classes)
	☐ Students
	☐ Instructors (includes all individuals teaching classes at this time)
	☐ Faculty: ☐ All Current ☐ Other:
	☐ Staff: ☐ All Current ☐ Other:
	☐ Courses (from the catalog)
	☐ Classes / Sections (offered by term)
	☐ Class Enrollments or Grades
	☐ Test Scores
	☐ Other – Describe:

Population Selection – Applicant / Student Attributes	
College	☐ All ☐ Specific College(s):
Major	☐ All ☐ Specific Major(s):
Concentration	☐ All ☐ Specific Concentration(s):
Other Program Criteria (Minor, etc.)	Describe:
Degree Level	☐ All ☐ Undergraduate Only ☐ Graduate Only
Extended Education	☐ Include all types ☐ Include specific types: ☐ Do not include
Admit/Enroll Status	☐ All (includes graduates and former students)
	☐ Currently Active and On Leave
	☐ Enrolled in specific term(s) (list terms):
	☐ Admitted in specific term(s) (list terms):
	☐ Admitted as type(s): ☐ First-time Freshman ☐ Transfer ☐ Graduate
	☐ Expected to Graduate in term(s) (list terms):
	☐ Graduated in term(s) (list terms):
	☐ Discontinued
	☐ Dismissed
Class Level	☐ All ☐ Class Level at beginning of term (specify term): ☐ Freshman ☐ Sophomore ☐ Junior ☐ Senior
	☐ All ☐ Class Level at end of term (specify term): ☐ Freshman ☐ Sophomore ☐ Junior ☐ Senior ☐ Graduate
Academic Progress Level	☐ All ☐ Specify % range:
Inclusions (Excluded by Default)	☐ FERPA Restricted Students – Provide reason:
	☐ Deceased Students – Provide reason:
Exclusions (Included by Default)	☐ Faculty or Staff enrolled as students
	☐ Students currently on a formal leave of absence
Other Selection Criteria	☐ Describe in detail or provide an attachment:

Population Selection – Courses / Enrollments / Other	
Data Type / Level	☐ Courses ☐ Sections/Classes ☐ Enrollments
Course/Section Info	☐ Subject(s): ☐ All ☐ Specific Subject(s):
	☐ Catalog Number(s): ☐ All ☐ Specific (list range or number(s)):
Time Frame	☐ Terms: ☐ Other:
Other Criteria	☐ Describe in detail:

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Information Requested	
Identifying Information	☐ Student ID / EMPLID

	☐ Name ☐ Preferred (default) ☐ Primary – Reason:
	Name Format:
	  ☐ Separate: Last First Combined: ☐ Last, First Middle
	  ☐ Other (specify):

	☐ Unique Anonymous ID (when identity is not needed)
Contact Information	☐ Email Address
Address / Phone	☐ Mailing ☐ Home/Current Address ☐ Dorm Address
	☐ Preferred Phone Number
Student Academic Information	☐ Degree Level / Career (Undergraduate, Graduate)
	☐ Primary College ☐ Primary Major ☐ Primary Concentration
	☐ Minor ☐ Other:
	☐ Admit Term
	☐ Admit Type (First-time Freshman, Transfer, Graduate)
	☐ Program Status (Active, On Leave, Discontinued, etc.)
	☐ Current Class Level (Freshman, Sophomore, Junior, Senior)
	☐ Academic Progress Level: ☐ Actual ☐ Expected
	☐ Expected Graduation Term
	☐ Actual Graduation Term ☐ Actual Graduation Date
	☐ Units Attempted: ☐ in term(s): ☐ Total Cal Poly ☐ Total Higher Ed
	☐ Units Earned: ☐ in term(s): ☐ Total Cal Poly ☐ Total Higher Ed

	☐ Grade Point Average (GPA):
	  ☐ Term – specify term(s): ☐ Cumulative
	  ☐ Cal Poly ☐ Higher Ed

Enrollment Information	☐ Term
	☐ Subject ☐ Catalog Number ☐ Section
	☐ Enrollment Totals
	☐ Enrollment by Student
	☐ Grade Totals
	☐ Grades by Student
	☐ Other – Describe in detail or provide an attachment:

Sort Criteria	
Sort Data by: (Place a number before each field if you select more than one)	____ EMPLID ____ Last Name, First Name ____ Term ____ College ____ Major ____ None ____ Other:

Special Instructions
Please provide any additional information or special instructions:

Form Submission / Data Delivery
Please send this form via email to: records-stu-data-rqst@calpoly.edu – Requests can take up to three weeks so please allow enough lead time.
Your data will be delivered via email in an Excel spreadsheet unless other arrangements are made.

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