LEVEL REPORT DISTRIBUTION

The following process is used to obtain, change, or discontinue receipt of monthly level reports.

Receiving monthly Level Reports is a critical tool for monitoring the activity in your accounts. Level Reports are generated on a monthly basis and are usually received by the second week of each month reflecting the activity of the previous month. Each Responsibility Center is required to approve the distribution of their accounts to those within their areas or outside if necessary; therefore, ALL requests are processed only if the appropriate approval signature appears on the request form.

TYPES OF DISTRIBUTION
Reports can be received by various methods of distribution:

A) Distribution can be made based on the 2 digit Responsibility Center number (i.e. 90 for WPIC). This will provide the recipient with ALL ACCOUNTS under the Responsibility Center for the reports selected.

B) Distribution can be made based on an entity & area number (i.e. 02.35). This will provide the recipient with ALL ACCOUNTS associated with this particular entity & area for the reports selected.

C) Distribution can be made based on an entity & department number (i.e. 04.02022). This will provide the recipient with ALL ACCOUNTS associated with this particular entity & department number for the reports selected.

D) Distribution can be made based on a 5-digit purpose number or 6-digit project number. This will provide the recipient with the particular account(s) identified by the purpose or project number/s for the reports selected.

PROPER COMPLETION OF THE REPORT DISTRIBUTION CORRECTION FORM:
This form is included each month with your Level Reports and should be used to request copies of Level Reports or to make changes to current recipient distributions:

SECTION ONE: This section is ONLY to be used when copying or moving an entire predefined distribution from one recipient to another. Provide the Current Recipient and New Recipient information in this section on the form and mark the action requested (i.e. copy or replace).

SECTION TWO: This section is to be used when adding new recipients, deleting current recipients, or making specific changes to existing recipients.

1) Choose the section which corresponds to the account type (i.e. Non-Research or Research).

2) Provide the required recipient information in this section.

3) Circle the action requested (add or delete).

4) Supply the appropriate account distribution type information (refer to the above information).

5) Mark all of the reports you want distributed or discontinued.

SECTION THREE: Completion of the information in this section will insure the processing of your request. ALL FORMS MUST HAVE THE APPROPRIATE APPROVING SIGNATURE AT THE RESPONSIBILITY CENTER LEVEL.

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