



Understanding the ER Case Summary Report

The **ER Case Summary Report** provides users with the ability to monitor and track Employee Relations Cases. This report offers overall case information, summary metrics, as well as a drill down option to the ER Case Report. *This report does not include cancelled actions and ER Consultations.*

Parameter Page

The parameter page is where you will choose your report filters.

ER Case Summary Parameters



- **Status of Actions:** Indicate if you wish to view actions with a specific status (Active, Closed, Archived or Closed or Archived) or if you wish to view actions of all status types.
- **Generate Report by:** Select a date field to filter the report.
- **Start and End Dates:** Enter a date range to filter the report.
- **Case Type:** Indicate if you wish to filter the report by a particular Case Type of if you wish to view all Case Types.

- **Final Action:** Indicate if you wish to filter the report by a particular Final Action or if you wish to view cases with all Final Actions.
- **ER Team:** Indicate if you wish to filter the report by a particular ER Team or if you wish to view cases related to all ER Teams. *Note: Your current permission settings dictate the ER Teams available for viewing.*
- **IC:** Indicate if you wish to filter cases by a specific Institute or Center (IC) or if you wish to view cases for all ICs.
- **Search Admin Code:** Indicate whether you would like to view actions for a specific admin code, a root admin code, or 'All.' By choosing 'By Exact Match' you can enter a specific admin code and the report will only return actions for that admin code. By choosing 'Begins With,' you can enter the root admin code for an organization. *For example, if you enter HN32, the report will return all actions that have an admin code beginning with HN32 (HN3212, HN32A, etc.),*
- **Display By:** Indicate if you wish to filter the report by a particular ER Specialist or ER Team Leader.

After you have selected your report parameters, *click* the 'Generate Report' button to retrieve your report.

ER Case Summary Report

The report displays overview information about ER cases including the number of calendar days the case took to close (*Date Received in HR to Date Case Closed*). The Action Status, Issue, and Comments (*from the Transaction Information tab*) are aligned on the left-hand side of the report underneath the Case #. Additionally, the Case # is a hyperlink to the ER Case Report.

Case # / Action Status Code	IC Contact's IC / Admin Code	ER Team	Branch Chief / Team Leader / Specialist	Date Received In HR	Case Type	Employee Name / Prior Discipline	Position Title Pay Plan Series Grade	IC Contact	Deciding Official	Proposed Action	Final Action	Did Employee Appeal? / Appellate Body	Date Case Closed	# of Days To Close Case
26323	OD - OHR / HNAM425	Team B	Lesiw, Roman / McDougal, Eugene / McDougal, Eugene	09/10/12	Conduct	MICHAEL D ANDREA / No	Human Res Spec (Info Sys/Class) GS-0201-13	Michael D andrea	Laura McClintock	Oral counseling	Reprimand	Yes / MSPB	09/24/12	14
Issue: Discourteous/inappropriate behavior, AWOL  Closed Comments: 10/03/12 - Issued Last Chance Agreement to employee.														
26350	OD - OHR / HNAM42	Team A	Lesiw, Roman / McDougal, Eugene / McDougal, Eugene	09/13/12	Conduct	MICHAEL D ANDREA / No	Human Res Spec (Info Sys/Class) GS-0201-13	Kenneth Kerr	Terronn Verge	Suspension - More than 14 days	Written counseling	No /	09/29/12	16
Issue: Ethics, Discourteous/inappropriate behavior, Confidential information - Failure to protect and/or disclosure, AWOL  Closed Comments:														

Summary Metrics Table

The report includes a summary metrics table, which can be used to monitor case workload and duration. The summary metrics table displays the number of Active and Closed/Archived cases, the number of cases that were appealed (*multiple appeals for one case are counted once*) and the average number of days to close a case. The table groups cases by the Case Type and shows the total for all.

Type of Case	# of Active Cases	# of Closed/ Archived Cases	# of Cases Appealed	Average # of days to Close Case
Performance	8	10	7	141
Conduct	10	21	11	30
Medical	3	2	1	23
Total	26	33	19	62

Exporting and Printing

This report can be printed or exported to Excel, PDF, or Word by clicking on the icon on the toolbar:

Note: The Summary Metrics Table does not export to MS Excel.

