**Bristol County Savings Bank Internal Report Request Form**

Instructions: All report requests must be submitted on an Internal Report Request Form. Please complete all of the fields, providing specific detail in the “Report Detail” section. Email this form, and any report samples or screen shots, to [**Report.Request@bcsbmail.com**](mailto:Report.Request@bcsbmail.com)

Submitted date: 10/2/2024 Requestor name: Kelly Abernathy

Type of request:  New  Modify existing (report name): Click to enter text.

Business area: Loan Operations

Purpose: Informational Project Name: Loan Modification Report

Proposed start date: 10/21/2024 Proposed due date: 10/31/2024

Output format:  PDF  Excel  iDashboard

|  |  |  |
| --- | --- | --- |
| Most recent business day | Most recent end-of-month | Specific Date: Click to enter a date. |
| Date Range: From: Click to enter a date. To: Click to enter a date. | | |

Report data as of:

Will this be a recurring report? Yes

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Daily | Weekly | Monthly | Quarterly | Yearly |
| Other: Click to enter text. | | | | |

If yes, frequency:

***Report Detail:***

|  |  |
| --- | --- |
| **Specific business need:**  Describe the business situation to be addressed by the report. | Provide insight into all the loan modifications tracked on active/Non-performing CML loans and who performed the updates |
| **Request goal:**  How will the business benefit from the report? | Insight, auditability |
| **Required fields:**  Provide the required fields names or description. | Acctnbr, Modification Reason, Mod Reason Description, Mod Date, Number of times modified, Modification fee, Person that completed the modiciation |
| **Field sort:**  Describe how the information should be sorted (account number, name, branch, etc.). | Status: ACT/NPFM, Major: CML |
| **Account Status:**  Check off account status(es) to include. | Active  Dormant  Non-Performing (non-accrual)  Closed  Charged-off |

To be completed by Report Writer

|  |  |  |
| --- | --- | --- |
| Job # | Date Submitted: | Date Assigned: |
| Created by: | | |
| Data Source(s) Used (COCC table name, etc): | | |
| Criteria/Filter: | | |
| Validation: | | |
| Output scheduled/saved (include schedule detail): | | |
| Draft submitted date: | Final delivery date: | |
| Final approval by: | | |