**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: 9/17/2025 Requestor name: Kelly Masefield

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

Business area: Operations

Purpose: Finance/Budget Project Name: Click to enter text.

Proposed start date: 9/17/2025 Proposed due date: 9/19/2025

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? No

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 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. | There are SBA funds that need to be refunded to the borrowers. Need a report with the most updated mailing address. |
| **Request goal:**  How will the business benefit from the report? | Obtain mailing address for SBA customers that need a refund |
| **Required fields:**  Provide the required fields names or description. | Loan Number, Borrower, Householding Number, Minor Code, Minor Description, Status, Loan Officer & full mailing address |
| **Field sort:**  Describe how the information should be sorted (account number, name, branch, etc.). | Filter by the loan numbers on the spreadsheet |
| **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: | | |