

Appendix E: Activity Report for Approved Credit Counseling Agencies

Please submit this report within 15 calendar days following the end of each **six month period**.

Questions? Contact United States Trustees at (202) 514-4100, Fax (202) 305-8536

Reporting Period: (Check one)	<input type="checkbox"/> July-December	<input type="checkbox"/> January-June	Year: _____
Name of Agency:	_____		Agency No:
Contact Person:	_____		E-Mail:
Someone who could answer USTP questions regarding report			

Instructions: Please provide actual (not estimated) data from all clients seen by your agency this reporting period. No cell should be left blank. If none, enter "0" in the cell.

New Clients this Reporting Period

Q1 Number of pre-bankruptcy clients counseled this reporting period	<input style="width: 90%;" type="text"/>
Q2 Number of other new clients counseled this reporting period	<input style="width: 90%;" type="text"/>

Debt Management Plans (DMPs)

Q3 DMPs active at the start of this reporting period	<input style="width: 90%;" type="text"/>
Q4 DMPs active at the end of this reporting period	<input style="width: 90%;" type="text"/>
Q5 Of all pre-bankruptcy clients seen this reporting period, how many enrolled in DMPs	<input style="width: 90%;" type="text"/>
Q6 Of all other new clients seen this reporting period, how many enrolled in DMPs	<input style="width: 90%;" type="text"/>
Q7 DMPs closed this reporting period with completed debt management plans	<input style="width: 90%;" type="text"/>
Q8 DMPs closed this reporting period without completed debt management plans	<input style="width: 90%;" type="text"/>
Q9 Percentage of pre-bankruptcy new credit counseling clients enrolled in DMPs*	<input style="width: 90%; background-color: #cccccc;" type="text"/> % <small>(Q5 ÷ Q1) x 100</small>
Q10 Percentage of other new credit counseling clients enrolled in DMPs*	<input style="width: 90%; background-color: #cccccc;" type="text"/> % <small>(Q6 ÷ Q2) x 100</small>

* If greater than 100%, please check your data

Instructions: Please provide actual counts and total fees for all bankruptcy certificates issued by your agency this reporting period. No cell should be left blank. If none, please enter "0" in the cell.

Credit Counseling Certificates Issued this reporting period

	Counseling Method			
	a In-Person	b Telephone*	c Internet	
Q11 Certificates issued at no cost				Q14 <u>Total Fees or Contributions</u> <input style="width: 90%; border: 1px solid black;" type="text"/> a <input style="width: 90%; border: 1px solid black;" type="text"/> b <input style="width: 90%; background-color: #cccccc; border: 1px solid black;" type="text"/>
Q12 Certificates issued at reduced cost				
Q13 Certificates issued at regular cost				
Total				
	(Q11a+Q12a+Q13a) (Q11b+Q12b+Q13b) (Q11c+Q12c+Q13c)			(Q14a+Q14b)

* Includes both Telephone only and Telephone combined with Internet counseling.