

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 for 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 new **pre-bankruptcy** clients counseled this reporting period

Q2 Number of **other** new clients counseled this reporting period

Debt Management Plans (DMPs)

Q3 DMPs active at the start of this reporting period

Q4 DMPs active at the end of this reporting period

Q5 Of all new **pre-bankruptcy** clients seen this reporting period, how many enrolled in DMPs

Q6 Of all **other** new clients seen this reporting period, how many enrolled in DMPs

Q7 DMPs closed this reporting period **with** completed debt management plans

Q8 DMPs closed this reporting period **without** completed debt management plans

Q9 Percentage of new **pre-bankruptcy** new credit counseling clients enrolled in DMPs* %
(Q5 ÷ Q1) x 100

Q10 Percentage of **other** new credit counseling clients enrolled in DMPs* %
(Q6 ÷ Q2) x 100

* 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 (Counts)			
	a In-Person	b Telephone*	c Internet	
Q11 Certificates issued at no cost				Q14 Total Fees or Contributions <div style="border: 1px solid black; width: 80px; height: 20px; margin: 5px;"></div> <div style="border: 1px solid black; width: 80px; height: 20px; margin: 5px;"></div> <div style="border: 1px solid black; width: 80px; height: 20px; margin: 5px;"></div>
Q12 Certificates issued at reduced cost				
Q13 Certificates issued at regular cost				
Total				(Q14a+Q14b)

(Q11a+Q12a+Q13a) (Q11b+Q12b+Q13b) (Q11c+Q12c+Q13c)

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