

Package: ffiec (via r-universe)

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Type Package

Title R Interface to 'FFIEC Central Data Repository REST API' Service

Version 0.2.0

Description Provides a simplified interface to the Central Data Repository 'REST API' service made available by the United States Federal Financial Institutions Examination Council ('FFIEC'). Contains functions to retrieve reports of Condition and Income (Call Reports) and Uniform Bank Performance Reports ('UBPR') in list or tidy data frame format for most 'FDIC' insured institutions. See https://cdr.ffiec.gov/public/Files/SIS611_-_Retrieve_Public_Data_via_Web_Service.pdf for the official 'REST API' documentation published by the 'FFIEC'.

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Encoding UTF-8

LazyData true

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Depends R (>= 4.1)

Imports cli, dplyr, httr2, jsonlite, purrr, rlang, stringr, tibble, xml2

Suggests knitr, rmarkdown, testthat (>= 3.0.0)

URL <https://github.com/ketchbrookanalytics/ffiec>,
<https://ketchbrookanalytics.github.io/ffiec/>

BugReports <https://github.com/ketchbrookanalytics/ffiec/issues>

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get_facsimile	<i>Retrieve Facsimile</i>
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Description

Retrieves Call Report or UBPR facsimile data from the FFIEC Central Data Repository API for the requested financial institution.

Usage

```
get_facsimile(
  user_id = Sys.getenv("FFIEC_USER_ID"),
  bearer_token = Sys.getenv("FFIEC_BEARER_TOKEN"),
  reporting_period_end_date,
  fi_id_type = c("ID_RSSD", "FDICCertNumber", "OCCChartNumber", "OTSDockNumber"),
  fi_id
)

get_ubpr_facsimile(
  user_id = Sys.getenv("FFIEC_USER_ID"),
  bearer_token = Sys.getenv("FFIEC_BEARER_TOKEN"),
  reporting_period_end_date,
  fi_id_type = c("ID_RSSD", "FDICCertNumber", "OCCChartNumber", "OTSDockNumber"),
  fi_id
)
```

Arguments

user_id	(String) The UserID for authenticating against the FFIEC API
bearer_token	(String) The Bearer Token for authenticating against the FFIEC API
reporting_period_end_date	(String, character vector, Date, or Date vector) One or more reporting period end dates. Character values must be formatted as "MM/DD/YYYY". Date objects are also accepted and will be coerced to the required format automatically.
fi_id_type	(String) The type of identifier being provided; one of c("ID_RSSD", "FDICCertNumber", "OCCChartNumber", "OTSDockNumber"); default is "ID_RSSD"
fi_id	(String or character vector) One or more financial institution identifiers (can also be supplied as an integer vector)

Value

A tibble containing the facsimile data.

References

https://cdr.ffiec.gov/public/Files/SIS611_-_Retrieve_Public_Data_via_Web_Service.pdf

Examples

```
if (!no_creds_available()) {
  # Assume you have set the following environment variables:
  # - FFIEC_USER_ID
  # - FFIEC_BEARER_TOKEN

  # Retrieve facsimile data for reporting period 2025-03-31 for institution
  # with ID RSSD "480228"
  get_facsimile(
    reporting_period_end_date = "03/31/2025",
    fi_id = 480228
  )

  # Retrieve UBPR facsimile data for reporting period 2025-03-31 for
  # institution with FDIC Cert Number "3510"
  get_ubpr_facsimile(
    reporting_period_end_date = "03/31/2025",
    fi_id_type = "FDICCertNumber",
    fi_id = "3510"
  )

  # Retrieve facsimile data for reporting periods 2025-03-31 and 2025-06-30
  # for institutions with ID RSSD of "480228" and "451965"
  get_facsimile(
    reporting_period_end_date = c("03/31/2025", "06/30/2025"),
    fi_id = c("480228", "451965")
  )
}
```

```
# Retrieve UBPR data for reporting periods 2025-03-31 and 2025-06-30
# for institution with ID RSSD of "480228"
get_ubpr_facsimile(
  reporting_period_end_date = c("03/31/2025", "06/30/2025"),
  fi_id = 480228
)
}
```

get_filers_since_date *Retrieve Filers Since Date*

Description

Retrieves filer information from the FFIEC Central Data Repository API for filers updated since a specified date.

Usage

```
get_filers_since_date(
  user_id = Sys.getenv("FFIEC_USER_ID"),
  bearer_token = Sys.getenv("FFIEC_BEARER_TOKEN"),
  reporting_period_end_date,
  last_update_date_time,
  as_data_frame = FALSE
)
```

Arguments

`user_id` (String) The UserID for authenticating against the FFIEC API

`bearer_token` (String) The Bearer Token for authenticating against the FFIEC API

`reporting_period_end_date` (String or Date) The reporting period end date. Character values must be formatted as "MM/DD/YYYY". Date objects are also accepted and will be coerced to the required format automatically.

`last_update_date_time` (String) Filter for records updated since this date/time. See [Details](#) for formatting options.

`as_data_frame` (Logical) Should the result be returned as a tibble? Default is FALSE.

Details

Set the `last_update_date_time` value to the last time you ran the method to retrieve only those institutions that have filed a newer report. Possible formatting options include:

- "04/15/2025"
- "2025-04-15 21:00:00.000"
- "04/15/2025 9:00 PM"

Value

A list containing the parsed JSON response from the API, where each element in the list represents an RSSD ID value. If `as_data_frame = TRUE`, then the list is converted to a tibble (and returned as such).

References

https://cdr.ffiec.gov/public/Files/SIS611_-_Retrieve_Public_Data_via_Web_Service.pdf

Examples

```
if (!no_creds_available()) {
  # Assume you have set the following environment variables:
  # - FFIEC_USER_ID
  # - FFIEC_BEARER_TOKEN

  # Retrieve filers since 2025-03-31, as of 2025-04-15 and return as a list
  get_filers_since_date(
    reporting_period_end_date = "03/31/2025",
    last_update_date_time = "04/15/2025"
  )

  # Retrieve filers since 2025-03-31, as of 2025-04-15 21:00:00.000 and return
  # as a tibble
  get_filers_since_date(
    reporting_period_end_date = "03/31/2025",
    last_update_date_time = "04/15/2025 21:00:00.000",
    as_data_frame = TRUE
  )
}
```

get_filers_submission_datetime

Retrieve Filers Submission Date Time

Description

Retrieves filer information from the FFIEC Central Data Repository API for the ID RSSDs and submission date and time of the reporters who have filed after the provided `last_update_date_time` and whose new filings are available for public distribution.

Usage

```
get_filers_submission_datetime(
  user_id = Sys.getenv("FFIEC_USER_ID"),
  bearer_token = Sys.getenv("FFIEC_BEARER_TOKEN"),
  reporting_period_end_date,
```

```

    last_update_date_time,
    as_data_frame = TRUE
  )

```

Arguments

`user_id` (String) The UserID for authenticating against the FFIEC API

`bearer_token` (String) The Bearer Token for authenticating against the FFIEC API

`reporting_period_end_date` (String or Date) The reporting period end date. Character values must be formatted as "MM/DD/YYYY". Date objects are also accepted and will be coerced to the required format automatically.

`last_update_date_time` (String) Filter for records updated since this date/time. See Details for formatting options.

`as_data_frame` (Logical) Should the result be returned as a tibble? Default is FALSE.

Details

Set the `last_update_date_time` value to the last time you ran the method to retrieve only those institutions that have filed a newer report. Possible formatting options include:

- "04/15/2025"
- "04/15/2025 9:00 PM"

Value

A list containing the parsed JSON response from the API, where each element in the list represents an RSSD ID value. If `as_data_frame = TRUE`, then the list is converted to a tibble (and returned as such).

References

https://cdr.ffiec.gov/public/Files/SIS611_-_Retrieve_Public_Data_via_Web_Service.pdf

Examples

```

if (!no_creds_available()) {
  # Assume you have set the following environment variables:
  # - FFIEC_USER_ID
  # - FFIEC_BEARER_TOKEN

  # Retrieve filers since 2025-03-31, as of 2025-04-15 and return as a tibble
  get_filers_submission_datetime(
    reporting_period_end_date = "03/31/2025",
    last_update_date_time = "04/15/2025"
  )

  # Retrieve filers since 2025-03-31, as of 2025-04-15 21:00:00.000 and return

```

```
# as a list
get_filers_submission_datetime(
  reporting_period_end_date = "03/31/2025",
  last_update_date_time = "04/15/2025 21:00:00.000",
  as_data_frame = FALSE
)
}
```

get_panel_of_reporters

Retrieve Panel of Reporters

Description

Retrieves filer information from the FFIEC Central Data Repository API for the financial institutions in the Panel of Reporters (POR) expected to file for a given Call reporting period.

Usage

```
get_panel_of_reporters(
  user_id = Sys.getenv("FFIEC_USER_ID"),
  bearer_token = Sys.getenv("FFIEC_BEARER_TOKEN"),
  reporting_period_end_date,
  as_data_frame = TRUE
)
```

Arguments

`user_id` (String) The UserID for authenticating against the FFIEC API

`bearer_token` (String) The Bearer Token for authenticating against the FFIEC API

`reporting_period_end_date` (String or Date) The reporting period end date. Character values must be formatted as "MM/DD/YYYY". Date objects are also accepted and will be coerced to the required format automatically.

`as_data_frame` (Logical) Should the result be returned as a tibble? Default is TRUE.

Value

A tibble containing the parsed JSON response from the API of filer information since the given `reporting_period_end_date` date value. If `as_data_frame = FALSE`, then the result is returned as a nested list object, where each element represents a unique ID_RSSD value.

References

https://cdr.ffiec.gov/public/Files/SIS611_-_Retrieve_Public_Data_via_Web_Service.pdf

Examples

```
if (!no_creds_available()) {
  # Assume you have set the following environment variables:
  # - FFIEC_USER_ID
  # - FFIEC_BEARER_TOKEN

  # Retrieve expected filers for reporting period 2025-03-31 and return as a
  # tibble
  get_panel_of_reporters(
    reporting_period_end_date = "03/31/2025"
  )

  # Retrieve expected filers for reporting period 2025-03-31 and return as a
  # list
  get_panel_of_reporters(
    reporting_period_end_date = "03/31/2025",
    as_data_frame = FALSE
  )
}
```

get_reporting_periods *Retrieve Reporting Periods*

Description

Retrieves Call Report or UBPR filer information from the FFIEC Central Data Repository API for available reporting periods.

Usage

```
get_reporting_periods(
  user_id = Sys.getenv("FFIEC_USER_ID"),
  bearer_token = Sys.getenv("FFIEC_BEARER_TOKEN"),
  as_data_frame = FALSE
)

get_ubpr_reporting_periods(
  user_id = Sys.getenv("FFIEC_USER_ID"),
  bearer_token = Sys.getenv("FFIEC_BEARER_TOKEN"),
  as_data_frame = FALSE
)
```

Arguments

`user_id` (String) The UserID for authenticating against the FFIEC API
`bearer_token` (String) The Bearer Token for authenticating against the FFIEC API
`as_data_frame` (Logical) Should the result be returned as a tibble? Default is FALSE.

Value

A list containing the parsed JSON response from the API, where each element in the list represents an available reporting period. If `as_data_frame = TRUE`, then the list is converted to a tibble (and returned as such).

References

https://cdr.ffiec.gov/public/Files/SIS611_-_Retrieve_Public_Data_via_Web_Service.pdf

Examples

```
if (!no_creds_available()) {  
  # Assume you have set the following environment variables:  
  # - FFIEC_USER_ID  
  # - FFIEC_BEARER_TOKEN  
  
  # Retrieve reporting periods and return as a list  
  get_reporting_periods()  
  
  # Retrieve UBPR reporting periods and return as a tibble  
  get_ubpr_reporting_periods(as_data_frame = TRUE)  
}
```

no_creds_available	<i>Handle missing UserID / Bearer Token values without throwing an error for unit testing purposes</i>
--------------------	--

Description

Handle missing UserID / Bearer Token values without throwing an error for unit testing purposes

Usage

```
no_creds_available(  
  user_id = Sys.getenv("FFIEC_USER_ID"),  
  bearer_token = Sys.getenv("FFIEC_BEARER_TOKEN")  
)
```

Arguments

`user_id` (String) The UserID for authenticating against the FFIEC API
`bearer_token` (String) The Bearer Token for authenticating against the FFIEC API

Details

Intended for internal use.

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no_creds_available

Value

(Logical) FALSE if a non-empty user_id and bearer_token have been supplied; otherwise TRUE.

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