Building Rural America
National Association of Credit Specialists
of the
USDA – Farm Service Agency
Information Technology Committee

THE INFORMATION TECHNOLOGY COMMITTEE MET AT PATRIOTS PLAZA III, IN WASHINGTON, D.C. ON JULY 11 – JULY 13, 2016, TO REVIEW RESOLUTIONS SUBMITTED BY THE MEMBERSHIP.

THE FOLLOWING RESOLUTIONS ARE RECOMMENDED FOR ADOPTION:

Resolution 1

CONCERN:
Events can only be entered in OTIS prior to the acutal event for approval.

PROPOSED SOLUTION:
Add a check box to mark event as unplanned which will allow user to input results for one approval.

Resolution 2

CONCERN:
Dashboard items are not always able to be completed by designated timesframes due to lack of resources, however the only options are to delete them or mark them complete.

PROPOSED SOLUTION:
Add an option for multiple selection of items that have a lower priority (such as farm assessment, chattel inspections, analysis, classifications, etc.) to mark them "not compete".

Also for completed items, create a summary page where you can view all items that have workflow that needs to be completed and can all be updated from that main page. Similar to how we have our loan checklist in DLM. However, don't remove where we can go into them individually.

Add an option for multiple "customer" selection of specific categories (such as farm assessment, chattel inspection, analysis, classifications) to mark as "not complete".

Resolution 3

CONCERN:
After checks are processed in NRRS, there is too much time lapsing before checks are completely processed (sometimes as long as 60 days), and we are releasing security in accordance with procedure before we are realizing that checks have been dishonored.

PROPOSED SOLUTION:
When checks are marked as final payment in NRRS, FLMs should receive notification within seven business days when a check has been honored or dishonored to prevent security from being released in accordance with proceedure (30 days).

Resolution 4

CONCERN:
DLS shows the incorrect number of years remaining for the term limits. This causes the field staff to manually calculate and update the field which adds time to loan processing.

PROPOSED SOLUTION:
Fix DLS to show the correct number of years remaining for term limits as reflected in PLAS.

Resolution 5

CONCERN:
Inputting emails into the notes section of FBP is very time consuming.

PROPOSED SOLUTION:
Allow us to attach/upload files to the FBP notes section.

Resolution 6

CONCERN:
FSFL are able to obtain real-time payoffs in DLM, but FLP aren't.

PROPOSED SOLUTION:
Allow FLP to have the same functionality.

Resolution 7

CONCERN:
USDA provides online services to enable its customers access USDA Web applications using eAuthentication. When a customer registers and is upgraded to Level 2 they should have access to FSAfarms+, Financial Inquiries for FSA Producers, etc.

The FSA provides access to these online programs to individuals but doesn't provides these services to entities or their representatives. Individual members of an entity can register and be upgraded to level 2 but this doesn't provide access to the entities customer records.

PROPOSED SOLUTION:
USDA and FSA should update online access to customer records and link individual entity members, with level 2 clearance, to the entity's customer records similar to the access provided to individual producers.

Resolution 8

CONCERN:
Laptops we are provided are excessively heavy (especially considering the files we also must take with us) as well as slow and with poor screen quality.

PROPOSED SOLUTION:
Since we always use them when connected to the internet, Surface Pro would be much cheaper and more mobile.

Resolution 9

CONCERN:
We are unable to pull a report with all loan officers by bank in GLS.

PROPOSED SOLUTION:
Create a report that lists the bank and Loan Officer with contact info (email, address & phone number) within a servicing offices territory.

Resolution 10

CONCERN:
Currently there is no place on the DLS Dashboard to record a chattel appraisal done by FSA or 3rd party other than the Loan Making Checklist Environmental area. Our appraiser each year asks us for a list of chattel appraisals completed.

PROPOSED SOLUTION:
Under the DLS Farm Visit tab add a checkbox for chattel appraisal completed. Also provide an interface between FMMI & PLAS into DLS to show 3rd party appraisals have been completed.

Resolution 11

CONCERN:
Payment remainder letter does not address acured interest. See attached letter.

PROPOSED SOLUTION:
Add wording to address acured interest for the design of the letter to look more like a payment statement.

Resolution 12

CONCERN:
Currently there is no way to keep track of PAD for customers

PROPOSED SOLUTION:
Designate on customer profile if customer has PAD; Impliment report to track who has PAD payments; Designate PAD Payments in DLS or ADP histroy screens.

Resolution 13

CONCERN:
GLS prefills the guarantee fee on the conditional commitment when using the data filled forms option for loans being made in conjunction with a direct down payment loan with a non-beginning SDA applicant. A guarantee fee is not required

PROPOSED SOLUTION:
Program GLS to have either a code or block to show that this is a non-beginning farmer SDA applicant for a loan being made in conjunction with a direct FLP down payment loan.

Resolution 14

CONCERN:
It takes a lot of time to go through the DLS dashboard and select each items, update, save, then select the next item.

PROPOSED SOLUTION:
Create a summary page for individual borrowers where you can view all items that have workflow that needs to be completed and can all be updated from that main page. Similar to how we have our loan checklist in DLM. However don't remove where we can go into them individually.

THE FOLLOWING RESOLUTIONS ARE RECOMMENDED FOR NON-ADOPTION:

Resolution 15

CONCERN:
Enterprise Analyses must be preloaded into Farm Business Plan for each individual borrower.

PROPOSED SOLUTION:
It would be a significant time savings to have the Enterprise Analysis feature of Farm Business Plan preloaded for all borrowers.

EXPLANATION FOR NON-ADOPTION BY THE COMMITTEE:
This capability is already available at the state level.

Resolution 16

CONCERN:
All FSFL and FLP reminders show up on the dashboard. In states where FSFL is not administered by FLP, it is difficult to manage only FLP customers as FSFL customers are also included in the reminders lists.

PROPOSED SOLUTION:
Create a tab for FLP and a tab for FSFL, so that FLP reminders can easily be sorted from FSFL reminders.

EXPLANATION FOR NON-ADOPTION BY THE COMMITTEE:
This issue has already been resolved.

Resolution 17

CONCERN:
On the FBP Assessment Term Limits section for FO under 2a it states "Have until the following date to apply for another FO (Subject to a limit of 10 outstanding years of total FO eligibility).

PROPOSED SOLUTION:
Change it to read "Have until the following date to close another FO (Subject to a limit of 10 outstanding years of total FO eligibility).

EXPLANATION FOR NON-ADOPTION BY THE COMMITTEE:
This issue has already been resolved.

Resolution 18

CONCERN:
Corrections to collateral codes are needed to ensure that they properly describe the actual security taken for the loan(s). In addition to the code corrections, collateral information should flow to the 540 report or other report.

PROPOSED SOLUTION:
Develop an easily accessible report that reflects the actual security associated with each individual loan.

EXPLANATION FOR NON-ADOPTION BY THE COMMITTEE:
We are able to pull collateral code report from Data Mart.

Resolution 19

CONCERN:
DLM does not notate an individuals account being linked to a specific entity account if they are a member of an entity.

PROPOSED SOLUTION:
Add to customer profile of DLM the name of the entity that an individual is linked to.

EXPLANATION FOR NON-ADOPTION BY THE COMMITTEE:
If entity relationships are entered correctly into Business Partner the active entity loans will show up on the individual's customer profile.

Resolution 20

CONCERN:
When using the fillable forms out of GLS, the forms only populate with one name and not all the related entity names. This causes problems as the county office has only two choices: 1. Type the other names on the forms with a typewriter or 2. Use the regular form off the forms website. Each of these options take valuable time away from employees, when the form should populate with the needed information in the first place.

PROPOSED SOLUTION:
A linkage needs to be established to pull all applicants and related entity names on to all fillable forms produced from GLS.

EXPLANATION FOR NON-ADOPTION BY THE COMMITTEE:
The Conditional Commiitment states that each individual entity member should sign, therefore only the entity name needs to be on these forms.

Resolution 21

CONCERN:
The state office in my state has established a FLP only listserv to cut down on unnessary emails to Farm Programs, however they have not done the same. It takes up time and server space to send out all these emails when they only apply to part of the agency.

PROPOSED SOLUTION:
Direct Farm Programs to set up a listserv in each state.

EXPLANATION FOR NON-ADOPTION BY THE COMMITTEE:
This will not fit with goals set by "One USDA" and Bridges to Opportunity.

Resolution 22

CONCERN:
There are multiple printers in the office that are unusable, take up space, and are still being paid for.

PROPOSED SOLUTION:
Identify unused and nonworking printers to be removed from the office inventory to lower costs.

EXPLANATION FOR NON-ADOPTION BY THE COMMITTEE:
State offices are already receiving quarterly or monthly inventory reports. Additionally, the manager of an office can notify ITS to remove any access equipment.

Respectfully submitted by the 2015/2016 Information Technology Committee,

LeAnn Gibbs, Zone A   Kris Bargen, Zone B

Becky Minter, Zone C - Chairperson   Patricia Sorensen, Zone D