

For: State and County Offices

**Management Records System (MRS) and  
AGCREDIT Conversion to the Advanced System 36**

Approved by: Acting Deputy Administrator, Farm Loan Programs



**1 Overview**

**A  
Background**

In March 1997, Field Offices were notified that MRS and AGCREDIT data and functions were being integrated and improved as a software application on the Advanced System 36 computer.

Agriculture Credit Directors (ACD's) were directed to:

- coordinate and be responsible for accurate, current, and complete data on MRS and AGCREDIT by August 1, 1997
- ensure that applicant or borrower data was not duplicated and was located in 1 office or on one 3B2 computer.

**B  
Purpose**

This notice:

- provides updated information to facilitate data conversion from the 3B2 computer to the System 36
- asks each State Office to identify how it administers FLP and the County Office locations of its 3B2 computers
- stresses the need for current and accurate information in MRS and AGCREDIT.

<b>Disposal Date</b>	<b>Distribution</b>
May 1, 1999	State Offices; State Offices relay to County Offices

## Notice FC-191

### 2 Workload Scheduling (WLS)

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#### A

#### Standard WLS Codes

The WLS codes in Exhibit 1 will be standard in the combined MRS/AGCREDIT system, which is called the Management of Ag Credit (MAC) system. Many of the WLS items will be created automatically in MAC.

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#### B

#### WLS Conversion

Each series will have the first 300 item codes reserved for National Office use, the next 200 will be reserved for State Office use, and the last 500 are reserved for County Office use.

**Example:** In the 1000 series, the National Office can assign WLS items for item codes 1000 through 1299, the State Office can assign WLS items for item codes 1300 through 1499, the County Office can assign WLS items for item codes 1500 through 1999.

At conversion, any WLS item code not standard will be reassigned a County Office WLS item code (the last 500 item codes in each series).

**Example:** If a County Office has created WLS item code:

- 1013, it will be assigned an item code from 1500 through 1999
- 2003, it will be assigned an item code between 2500 and 2999.

All non-standard WLS item codes previously assigned by the County Office that match 1 of the last 500 item codes in each series will convert as the same WLS item code.

**Example:** If a County Office has created WLS item code 1501, it will convert as WLS item code 1501.

If there is any question about what item code to assign a previously created WLS item code, a 9000 series item code from 9500 through 9999 will be assigned during the conversion process.

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## Notice FC-191

### 3 Action

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#### A State Office Action

SED's shall:

- direct ACD to be responsible for accurate and up-to-date data in the MRS and AGCREDIT software applications on the 3B2 computer

**Note:** MRS priority items for conversion are:

- applicant/borrower information
  - application processing data from date received through loan closing
  - workload scheduling.
- as part of cross training and to prepare the MRS and AGCREDIT systems for conversion to the Advanced System 36, direct program assistants to learn how and participate in entering data into the MRS and AGCREDIT systems
  - provide a written report detailing:
    - the State's Ag Credit system structure
    - location of 3B2 computers
    - which County Office data resides on each 3B2 as of April 30, 1998
    - changes planned between October 30, 1998, and July 1, 1999
  - update the report whenever changes occur before July 1, 1999
  - FAX reports and subsequent updates to Kathleen Miller, LMD, at 202-690-1117 by July 10, 1998.
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#### B County Office Action

County Offices shall:

- use MRS to record application and workload scheduling information instead of the old Management System Box (MSB)

**Note:** Manually entering data from MSB to the MAC system will be very time consuming.

- adopt the WLS item codes in Exhibit 1 to record County Office workload
  - have MRS and AGCREDIT data ready for conversion by October 1, 1998, with complete application data and workload scheduling set as priorities for MRS conversion to the System 36.
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**WLS Codes**

Use these MAC WLS item codes to facilitate data conversion from the 3B2 computer to the System 36. Add the new item codes on this list to MRS WLS and change the MRS item code descriptions to match this list.

**Note:** Since new standard WLS items are being developed, this may not be the final list.

Item Code	Description	Element WLS Item Generated From	Follow-up Date
<b>1000 Series - Applications</b>			
1010	14-day Loan Decision for ALP/CLP/PLP Lender	"Application Completed Date" is completed and "Lender Status Code" equals 1, 2, or 3.	10 days
1011	Application Completed Letter	"Application Completed Date" is completed.	3 days
1012	40-day Application Completed	"Date Received (Appl)" is completed and "Application Completed Date" is blank.	20 days
1014	5-day Application Letter 1 (Guaranteed Loans - 1980-B-1 letter)	"Direct/Guar" equals "G" and "Date Received (Appl)" is completed and "Completed Date" is blank.	3 days
1015	10-day Application Letter 1 Review for Incomplete Application	"Direct/Guar" equals "D" and "Date Received (Appl)" is completed and "Application Completed Date" is blank.	5 days
1016	20-day Application Letter 2 Review for Incomplete Application	"Incomplete Appl Letter 1" is completed and "Application Completed Date" is blank.	10 days
1017	5-day Eligibility/Non-Eligibility Letter Sent	"Eligibility Decision Date" is completed and "Action Description 1, 2, or 3" equals "ECC", "RCC", "ELO", or "RLO."	2 days
1018	3-day Rejection Letter Sent (Feasibility)	"Final Disposition Date" is completed and "Final Disposition Action" equals "R."	
1019	2-year Completion of Borrower Training Requirement	"Training Effective Date" is completed at loan closing or restructure.	18 months
1021	Appraisal/Environmental Functions		

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## WLS Codes (Continued)

Item Code	Description	Element WLS Item Generated From	Follow-up Date
<b>1000 Series - Applications (Continued)</b>			
1023	Personal Interview/Budget		
1024	Farm Assessment		
1025	60-day Loan Decision for Direct Loans	"Application Completed Date" is completed and "Direct/Guar" equals "D."	45 days
1027	30-day Loan Decision for Other Lenders	"Application Completed Date" is completed and "Lender Status Code" equals "4".	20 days
1028	Reason Code	"Application Completed Date" is completed and "+45 days and Final Disposition Date" is blank.	10 days
1030	10-day Schedule Loan Closing	"Check Date" completed (Direct Loan Processing).	5 days
1035	3-day CAIVRS Check on delinquency of Federal debt	"Date Received (App.)" completed.	2 days
<b>2000 Series - Servicing Direct and Guaranteed</b>			
2000	60-day Real estate Appraisal	"Fund Code" equals "41" and "Final Disp. Action" equals "A".	45 days
2001	Supplementary Payment Agreement		
2010	Delinquency Visit (Office)		
2015	Supervisory Visit (Field)		
2020	Supervisory Visit (Office)		
2024	Graduation Review		
2025	30-day Graduation Review Follow-up (Borrower)	"Screening Results" equals "1".	15 days
2026	Lender Prospectus Follow-up		

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WLS Codes (Continued)

Item Code	Description	Element WLS Item Generated From	Follow-up Date
<b>2000 Series - Servicing Direct and Guaranteed (Continued)</b>			
2027	Notice of Intent for Refusal to Graduate <b>Note:</b> May require OGC concurrence.		
2030	Debt Settlement Follow-up		
2035	Problem Case Report		
2040	Acceleration Notice		
2050	Delinquency Visit (Field)		
<b>3000 Series - General Office</b>			
3000	First Year Return of Insurance Policy		
3001	Supervised Bank Account Monthly Report		
3005	Expiration of Builders Warranty		
3006	Development Inspection		
3010	Final Building Inspection		
3011	30-day Follow-up after End of Cost Item		
<b>4000 Series - Additional Servicing</b>			
4000	1-Year Limited Resource Review	"Loan Closing Date" or "Last Review Date" is completed.	11 months
4001	Classification Review		
4002	Farm Assessment	"Loan Closing Date" is completed on Program Loans.	6 months
4003	Guaranteed Status Report		

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WLS Codes (Continued)

Item Code	Description	Element WLS Code Generated From	Follow-up Date
<b>4000 Series - Additional Servicing (Continued)</b>			
4004	Default Status Report	If "Status" is "B" from the Guaranteed Status Screen (60 days).	
4005	Field Visit		
4006	County Committee Classification Review		
4007	Process Limited Resource Interest Rate Change	30-days from the Limited Resource Review Date.	15 days
4008	Payment Reminder		90-day follow-up to installment date/60-day expiration
4010	Follow-up 1962-1		
4015	Follow-up on Security Agreement		
4020	Financing Statement Renewal		
4025	Year-end Analysis	"Loan Closing Date" is completed for all loan closings, if one has not already been scheduled.	
4026	Release of Liability		
4030	Subordination Review		
4035	Guaranteed Loan Review		
4040	Line of Credit Review		
4046	Interest Assistance Review		
4050	24-month NRB Review		
4051	Annual Shared Appreciation Agreement Reminder		Due 7/1 Expires 9/30 of the following year

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WLS Codes (Continued)

Item Codes	Description	Element WLS Code Generated From	Follow-up Date
<b>4000 Series - Additional Servicing (Continued)</b>			
4052	6-month Shared Appreciation Calculation		6 months
4053	60-day Notification of Appreciation Due		60 days
4054	30-day Follow-up to Shared Appreciation Notification		30 days
4055	Partial release, Subordination, Consent Request		
4060	Chattel Appraisal		
4065	Annual Farm Visit	"Loan Closing Date" is completed for all loan closings, if one has not already been scheduled.	
4070	Chattel Inspection	"Loan Closing Date" is completed for all loan closings, if one has not already been scheduled.	
4075	Crop Inspection		
4080	NRCS Conservation Follow-up		
4081	Conservation Contract Compliance Review		
4085	Crop Insurance (Premium Due Date)		
4086	CAT Insurance or Waiver		
4087	Hazard Insurance Coverage		
4100	60-day Primary Loan Servicing Request	Date application received for servicing.	
4105	Real Estate Lien Follow-up		
4110	Highly Erodible/Wetland Conservation Compliance		

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WLS Codes (Continued)

Item Code	Description	Element WLS Code Generated From	Follow-up Date
<b>5000 Series - 1951-S Servicing</b>			
5000	Exhibit A and Attachments 1 and 2 - 90 days past due	15 days from delinquent date	7 days
5001	1951-C Offset Letter - 90 days past due	15 days from delinquent date	7 days
5002	Real Estate Contractor Appraisal		20 days
5010	Exhibit F, Attachment 3 Signed - Waiting on Negotiated Appraisal	30 days from date signed	
5015	Process 1951-T Application	"DSA -Application Completion Date" is completed and "DSA-Final Disposition Date" is blank.	
<b>6000 Series- FHP Key Management Practices</b>			
<b>8000 Series - Appeals</b>			
8001	Appeal Request		
8002	Meeting for Reconsideration		
8003	NAD Appeal Follow-up		
8004	NAD Pre-Hearing Conference Call		
8005	Copy Document for NAD and Appellant		
8006	NAD Appeal Hearing		
8007	30 day NAD Appeal Implementation Follow-up	"Final Decision Date" is completed.	20 days
8008	National Office Review Follow-up		
8010	Mediation Follow-up		

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WLS Codes (Continued)

Item Code	Description	Element WLS Code Generated From	Follow-up Date
<b>8000 Series - Appeals</b>			
8011	State Committee Appeal Follow-up		
8012	State Committee Reconsideration Follow-up		
8013	Appraisal List to Appellant		
8014	Appellant's Appraisal Follow-up		
8015	Review Appraisal Follow-up		
8016	Selection by Appellant of Third Appraiser		
8017	Appraisal Appeal, Exhibit F, Attachment 3 Follow-up		
8018	Appellant's Negotiated Appraisal Follow-up		
8019	Appraisal Appeal Implementation		
<b>9000 Series - Miscellaneous</b>			