UNITED STATES DEPARTMENT OF AGRICULTURE
Farm Service Agency
Washington, DC 20250

Notice FLP-536

For: State and County Offices

FBP Enhancements

Approved by: Acting Deputy Administrator, Farm Loan Programs

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1 Overview

A Background

FLP regulations require that FBP be used to perform financial planning, analysis, loan origination, and servicing functions. Changes have been made in FLP directives, which had not been implemented in FBP. Changes to FBP, General Information Screen and Eligibility sections have now been completed and are scheduled for release on May 4, 2009.

B Purpose

The notice:

- informs State and County Offices of the new FBP enhancements that will be available
- provides instructions to Field Offices on implementing the new FBP enhancements.

C Contact

If there are questions about this notice:

- Service Centers shall contact the State FBP Coordinator

- State Office shall contact Pixie Greer by either of the following:

  - e-mail at **pixie.greer@wdc.usda.gov**
  - telephone at 202-720-1652.

Disposal Date	**Distribution**
October 1, 2009	State Offices; State Offices relay to County Offices

2 New FBP Enhancements

A Assessment Element Headings

A new General Information model has been created in FBP with assessment element headings that match 1-FLP, paragraph 222. This new General Information model will be automatically displayed for all **new** customers added to FBP.

For **existing** customers, the new General Information model will need to be selected by the user when a new Credit Action is added. This is a **one-time step,** and once completed, the new General Information model will always be displayed when the customer is accessed.

Note: There is no requirement to immediately update all existing customers; however updates will be required when completing a new credit action.

Instructions on how to select the new General Information model have been provided by Web Equity Solutions (WES) in a recorded training session. User should access the training session at **http://www.webequitysolutions.com/FBP-Webcast-042709/FBP-042709.html**

When the new General Information model is selected by the user, text from the previous completed assessment, will automatically copy over to the new assessment elements based on the following table. For those assessment elements where the old element does not match up with the new element, user will need to perform a **one-time** cut and paste, to move text to the correct new assessment element.

Example: Any text information in an existing assessment under the element “Training Recommendations” will transfer to “Loan Evaluation” when the new General Information model is selected. The user will need to determine if this information should now be included under a different element, ie; “Training Plan”, and if so, move the text using the cut and paste functionality in word.

Old Assessment Element	Text Copied to New Assessment Element
Type of Operation	Type of Farming Operation
Goals & Objectives	Goals for the Farming Operation
Real Estate Facilities & Environmental Concerns	Adequacy of Real Estate, Including Facilities, to Conduct the Operation
Chattel Property	Adequacy of Chattel Property Used to Conduct the Operation
Farm Business & Organization & Key Personnel/Record Keeping	Farm Organization and Key Personnel Qualifications
Key Management Goals	Supervisory Plan
Historical Financial Data	Historical Performance

2 New FBP Enhancements

A Assessment Element Headings (Continued)

Old Assessment Element	Text Copied to New Assessment Element
Projected Farm Business Plan	Farm Operating Plan
Planned Changes	Training Plan
Training Recommendations	Loan Evaluation
Market Placement/Test For Credit	(See Note below)
Planned Supervision	(See Note below)

Note: These text boxes will not have a prefilled assessment element heading in the new General Information model. Information automatically transferred to these elements will need to be moved, using cut and paste, to the appropriate assessment element. These text boxes will not "update" in new credit actions and should remain blank on the General Information Screen.

B Case# Field on General Information Screen

The "Case#" field on the General Information screen is being changed to "Credit Relationship Status". This will automatically be displayed for all **new** customers added to FBP.

For **existing** customers, this will automatically be displayed when the updates in subparagraph A are completed.

C Eligibility Questions

Both the "Cred.Pres./Borr.Class." and "Eligibility Only" Credit Presentations have been changed to remove the "Credit Worthiness" section and to rearrange and clarify eligibility criteria for both Loan Making and Loan Servicing.

These changes will automatically be displayed on any new credit actions that are created for **new** and **existing** customers.

D Credit Reports

The option to select a single or merged report has been removed. The System will now automatically default to a merged report.

E New FBP Coordinator Functionality

FBP Coordinators now have the ability to change the "Balance Sheet Model" in a customer's file if the incorrect balance sheet is selected when a new customer is added to FBP.

3 Action

A Service Center Action

All employees, with FBP access, shall immediately view the recorded training session that is provided by WES (subparagraph 2 A).

Note: E**xisting** customers shall be updated according to the instructions provided in subparagraph 2 A.

B State Office Action

State Offices shall ensure that Service Centers comply with the required actions in this notice.

C National Office Action

The National Office FBP Program Manager shall continue to monitor the FBP active database to ensure that accounts are managed as described in this notice.