

Meeting Minutes

Borrower Inquiry Sub Committee

January 22, 2020

Attendees: Denice Dosh - Columbia Threadneedle, Nina Nolley - VHDA, Melissa Gayle - VHDA, Yvonne Broaddus – VHDA, Heidi Morrow- Trimont, Andrea Chin Scott - CPC, Mandar Shilotri- CPC, Rahmon Habeeb - CPC, Jessica Underwood- CPC, Denise Pappu – Wells Fargo, Chris Fielder – CBRE, TJ Arrowsmith – NCB, Thomas Firestone – Capital Impact, Joan Sittard – McCracken

Meeting started at 2:00 pm EST by Denice Dosh

Meetings will be scheduled for the 3rd Wednesday of each month at 1:00 pm Central time. According to need the meeting time may be increased or decreased.

Reviewed the outstanding jobs for Borrower Inquiry; group set priority

Job	Description	Priority 1-5 (1 Low-5 High)
20304	Modify Borrower Inquiry to upload and display external documents into the application. Also add functionality to display MCA bills from the application.	<p>The subcommittee requested that this job be broken out into two jobs.</p> <p>Ability to have external documents be uploaded and displayed was given a high priority (5)</p> <p>Ability to add MCA bills priority is low (2)</p> <ul style="list-style-type: none">- How many customers impacted?- Currently bug in MCA bills
20534	Amortization Schedule Borrower Inquiry>Reports>Amortization Schedule Customer has requested two items to be updated on the Borrower Inquiry Amortization Schedule Report Change the field label Loan Amount to be Loan Balance (this will avoid confusion with original loan amount) Move the label ***Notes*** to be right justified to align with the info	<p>This was given a high priority of a 5</p> <ul style="list-style-type: none">- Cosmetic/Quick Hit

20944	Add within the Borrower Inquiry application a means of changing the email address for users. When the email address is blank the user is prompted to set up an email address, however there is not a means of changing the email address once after set up. Changing the email address should be a function of the system administrator. 20981report, an error is received.	This was given a high priority of a 5 <ul style="list-style-type: none"> - This is related to Security and not the customer updating data. - Password change and email address input on first log-in after update - New BI version ID is case sensitive - With update receive email when password change requested
20981	Error Received When running a Borrower Inquiry reserve history report	On Work In Process List for R20
21020	Create the ability to have forms in Borrower Inquiry	This was not discussed; there was an incorrect job number on the outstanding list

Other Discussion:

CPC inquired if custom billing statements are included in Borrower Inquiry. This would be a custom request

NCB inquired if job 20475 – Amortization Schedule with pending payments would be included in Borrower Inquiry. This job is not scheduled.

VHDA has a request to change the 5,000 record limitation when running an account status summary. They would like the number of records increased. They have borrowers with a growing portfolio and do not want to run each individually.

Meeting Adjourned 2:20 pm EST

Items for February meeting:

Job 20475 – Amortization Schedule with pending payments would be included in Borrower Inquiry. This job is not scheduled.

- Priority?
- Others interested?
 - o Columbia Threadneedle

Change the 5,000 record limitation when running an account status summary. They would like the number of records increased. They have borrowers with a growing portfolio and do not want to run each individually.

- (record = transaction and currently 125 loans exceed the limit)
- This also impacts Columbia Threadneedle.
- Priority?