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**Financial & Corporate Compliance**

# **Release Notes**

TSoftPlus™

December 2024

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# Financial & Corporate Compliance

This publication was written for TSoftPlus SaaS

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# TSoftPlus Release Notes

TSoftPlus is specifically designed to support SBA loan processing for banks, credit unions, and other financial institutions without sacrificing compliance or risk management.

These release notes provide information about new features, enhancements, and defect corrections for TSoftPlus. The release notes are organized based on each monthly release and include product changes made over the current calendar year.

## Release Schedule

The following is a list of planned releases for 2024. When necessary, this schedule may be adjusted according to business needs or deploy additional releases outside of this schedule.

January 18  
February 15  
March 21  
April 18  
May 14 (Hotfix)  
May 16  
June 12 (Hotfix)  
June 20  
July 18  
August 15  
September 19  
October 17  
November 21  
December 19

## Complimentary Custom One-on-one Training

You are invited to join us for a TSoftPlus™ training opportunity. This complimentary offering is designed for customers who desire a customized training package to meet your specific institution's needs. A Wolters Kluwer representative will contact you to discuss, develop, and design the event, which can be delivered in multiple 2-hour blocks via the web at no charge.

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To request an assessment, please send an email request to [sues@wolterskluwer.com](mailto:sues@wolterskluwer.com), and a Wolters Kluwer representative will contact you within 24 hours.

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## TSP Build: 1.0.0.6132 —December 19, 2024

### Updated SBA Guarantee Fee Calculations (SBA 7a Borrower Information Form)

The SBA published [Information Notice 5000-858936](#) announcing 7(a) fee changes for fiscal year 2025 (FY2025). With this announcement, the 7(a) *Lender's Annual Service Fee* (or on-going guaranty fee) and the *SBA Guaranty Fee* (or upfront guarantee fee) for 7(a) loans have been updated. The fees are effective for all 7(a) loans approved on October 1, 2024, through and including September 30, 2025.

With this announcement, the calculation for the *Upfront Guarantee Fee* has been modified. For 7(a) loan types excluding 504, PPP, PPF, SBA Veterans Advantage and Export Working Capital the rates for calculation the *Upfront Guaranty Fee* will be calculated according to the following conditions:

- If the loan term is 12 months or more:
  - if the loan amount is equal \$500,000 or less: 0.00%.
  - if the loan amount is from \$1,000,001 to \$5,000,000: 3.5% of the SBA guarantee up to \$1,000,000, plus 3.75% of the SBA guarantee over \$1,000,000.

### RMA Annual Statement Studies

RMA Annual Statement Studies® data for 2024-25 is now available in TSoftPlus. The Risk Management Association (RMA) releases industry benchmark data in the Annual Statement Studies. The 2024-2025 data set is now available as a supplement for use in performing financial analysis.

### Financial Analysis File Upload Validation

Updated the file upload feature on the *Financial Analysis* page to enhance application security and protect against vulnerabilities that can be introduced through files uploaded to the application. You can now upload only Microsoft Excel (.xls) files on the *Financial Analysis* page through the **Upload** feature. The file size limit on uploaded files (spreadsheets) is 5 MB.

## TSP Build: 1.0.0.6056 —November 21, 2024

### Summary Page File Upload Validation

Updated the file upload feature on the *Summary Documents* page to enhance application security and protect against vulnerabilities that can be introduced through files uploaded to the application. You can now upload only supported file types, listed below, on the *Summary Documents* page through the **Upload Document** feature. Uploaded files are displayed in the *Additional Documents Phase* view and the file size limit on uploaded files is 5 MB.

#### Supported Document File Types

- pdf (Portable Document Format; Adobe Acrobat)

- 
- .doc, .docx (Microsoft Word Document)
  - .xls, .xlsx (Microsoft Excel Document)
  - .csv (Comma-separated value file)
  - .ppt, .pptx (Microsoft PowerPoint Presentation)
  - .dwg (CAD software)
  - .rtf (Rich Text Format)
  - .txt (Text files)

### Supported Image File Types

- .bmp
- .png
- .jpg / .jpeg
- .gif
- .ico
- .psd
- .tiff

## Loan Import Page File Upload Validation

Updated the file upload feature on the *Summary Documents* page to enhance application security and protect against vulnerabilities that can be introduced through files uploaded to the application. You can now upload only XML files (.xml) on the *Summary Documents* page through the **Import XML** feature. The file size limit on imported transaction files is 5 MB.

## New Role for Demographics Information

Added a new permission, *Demographics page - View, Modify*, to enable those granted the permission to view and modify demographic information presented on the *Demographics* page. This update is introduced now in preparation of future implementation of features supporting **Section 1071** compliance requirements requiring financial institutions to collect and report certain data points on applications for credit for small businesses to the CFPB.

## Updated Eligibility Page for Section 1071 Support

Added a new option, **Section 1071**, on the *Eligibility* page. This option is introduced now in preparation of future implementation of features supporting compliance requirements related to **Section 1071** of the Dodd-Frank Act.

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## TSP Build: 1.0.0.5990 —October 17, 2024

### Form 1919-Ownership and Demographic Table Updates

Updated the *Ownership and Demographic Information* section display to differentiate direct and indirect ownership more clearly. The display table was updated to separate direct and indirect ownership into two columns. The calculation rules for total ownership, including direct and indirect ownership, were updated to disclose based on the applicant. The **Indirect Ownership %** on the *Ownership and Demographic Information* section was changed to allow direct entry of the percentage in the displayed table and the mapping from the *Parties* page was removed.

## TSP Build: 1.0.0.5944—September 19, 2024

### Form 1059-Security Agreement

Changed the document to define collateral more thoroughly.

- **Collateral** descriptions were added for the following in *Section 4. Collateral Description*: Collateral Types: Accounts (Generally), Deposit/Share Accounts, General Intangibles (Generally), Chattel Paper, Instruments, Fixtures, and Documents. Previously the se did not print a general description.
- **Collateral type** descriptions were modified for the following: Letter of Credit -- Proceeds, All Goods, Commercial Tort Claims, Boat (State Titled/Residence), Boat (State Titled/Non-Residence), Trailer (Titled/Non-Residence), and Outboard Motor.
- **A new paragraph** was added to end of *Section 4. Collateral Description*.
  - If *Farm Products* or *Timber to be cut* is selected as collateral on the loan, the new paragraph reads: "*Other than farm products and/or timber to be cut, there is no intention to limit the scope of any general collateral category stated above by adding a description of a specific property that is included within a general category*".
  - If *Farm Products* and *Timber to be cut* are **not** selected as collateral, the new paragraph reads: "*There is no intention to limit the scope of any general collateral category stated above by adding a description of a specific property that is included within a general category*".

### Form 1919-Borrower Information Form

On July 12, 2024, the SBA updated *Form 1919: SBA 7(a) Borrower Information Form* as a result of the final *Criminal Justice Rule* where regulations governing SBA's business loan programs for criminal background reviews were amended.

The following changes have been made to Form 1919:

- **Section I: Questions, question #4** was updated to read: "*Is the Applicant or any Associate of the Applicant currently incarcerated, serving a sentence of imprisonment imposed upon adjudication of guilty, or is under indictment for a felony or any crime involving or relating to financial misconduct or a false statement?*".

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- In the **Applicant Certification** section, a new paragraph was added: *“The U.S. Small Business Administration (SBA) is hereby authorized to release any and all information about my existing SBA Loans to the Lender processing this loan application. I understand that information released may include, but may not be limited to, information relating to my loan amount and payment transactions history, and/or the provision of copies of my loan documents, which may contain non-public information relating to all obligors and/or guarantors (if applicable)”*.
  - The *Expiration* and *Revision Dates* have been adjusted to match the updated form.

## Form 159 Fee Disclosure and Compensation Agreement

Added *Form 159 Fee Disclosure and Compensation Agreement* to the **Closing** package. Currently this document selects in the **Application** phase. With this change, it is now selected in both.

### California

#### Real Estate Property Insurance Disclosure-CA

The *Real Estate Property Insurance Disclosure* for California has been added to **Closing** packages. This document will select if the loan has real estate collateral, and the organization jurisdiction or collateral location is California.

### Texas

#### Designation of Homestead and Affidavit of Non-Homestead (TX)

The *Designation of Homestead and Affidavit of Non-Homestead (TX)* has been added to **Closing** packages. This document will select if the loan has residential real estate collateral located in Texas, and the property is not the owner's homestead. To define whether the collateral is the owner's homestead, a new field has been added under the *Options Date Fill-In* page under Collateral.

### Maine

#### Notice Pursuant to Section 505\_5 of Title 33 of MRSA-ME

The *Notice Pursuant to Section 505\_5 of Title 33 of MRSA-ME* has been added to **Closing** packages. This document will select in the closing package if the loan has real estate collateral, and the collateral state is Maine, and a lienholder has been added to the collateral record. In addition, a new field has been added under *Options Date Fill-In* page under Lienholder to further define if the current lender holds the existing lien or not.

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## TSP Build: 1.0.0.5882 —August 15, 2024

### Form 1919 Disclose in Ownership Table Flexibility

Updated the *Disclose in Ownership Table* checkbox to allow editing in the *Ownership and Demographic* section. This change allows you to determine what owners are submitted in the data to E-Tran and included on the *Form 1919*. With this change, the base rules determining the defaults selections for the *Disclose in Ownership Table* checkbox remain unchanged, including:

- Selected when ownership %  $\geq 20\%$ ,
- Selected for a direct owner if the same selection is made for the indirect owner,
- The selections remain in place unless the party is removed or the ownership percentage is updated.

### IRS Form 4506 Request for Copy of Tax Return

On January 16, 2024, the IRS published revisions to their *Request for Copy of Tax Return, Form 4506*. The document date was updated to January 2024, the requested form fee was reduced from \$43 to \$30, and the states listed in the chart for individual returns (Form 1040 states) were rearranged. All text updates have been made to the form in the system, and *Section 8 Fee* will calculate using \$30 instead of \$43.

## TSP Build: 1.0.0.5841—July 18, 2024

### Form 1919 Enhancements (SBA 7a Borrower Information Form)

Added mapping for the *Entity Type* section of Form 1919. The mapping is based on the *Entity Type* field on the *Party Details* page. Previously, the *Entity Type* was only available for selection directly on the document.

## TSP Build: 1.0.0.5798—June 20, 2024

There are no changes impacting the user interface or documents in the June 2024 release.

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**Note:** The June 12, 2024, release included features supporting the latest *SBA Form 1919* revisions.

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## TSP Build: 1.0.0.5798—June 12, 2024

### Form 1919 Enhancements (SBA 7a Borrower Information Form)

With this release, we have replaced the prior version of *Form 1919*. This enhancement involved several modifications to the TSoftPlus screens related to entering information required on the *SBA 7a Borrower Information Form* (Form 1919). The SBA significantly reorganized and streamlined the form and changed the requirements (the information necessary) for submitting the form into E-Tran. The system was updated to adhere to these changes in data collection and E-Tran submission requirements.

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## Application Changes

- Updated the *Use of Proceeds* information to associate to a **party and not a transaction**. The *Use of Proceeds* page was modified to support collection of proceeds information at the party level – for each borrower or guarantor. Previously, it was collected on the transaction level.
  - On the *Use of Proceeds* page, you can click **View/Specify** to open a summary showing all categories and use of proceeds options.
  - On the *Summary* and *Weighted Average Term* pages, the *Use of Proceeds* sections displays the total amount of the proceed type for all borrowers/guarantors.
- Updated the *Use of Proceeds* section on the *Quick Quote* feature to include options for borrower, unlimited guarantor, and limited guarantor. Selecting one of these options adds a new row on the page where use of proceeds information can be entered.
- Updated how *Controlling Interest* is calculated, collected, and submitted to E-Tran as part of *E-Tran Additional Required Data*. You can set controlling interest options for borrowers (the default is *Yes* for the first borrower). For owners, direct or indirect, the value is set to *Yes* if the ownership percentage is greater than 50% OR if the ownership percentage is 20% or greater and there is no Owner with a greater than 50% ownership percentage.
- A new section, **Ownership and Demographic Information**, has been added to the *Loan Information* page. You can optionally disclose an applicant with less than 20% ownership by selecting the **Disclose in Ownership Table** options in the *Ownership and Demographic Information* section.
- Moved the *Eligible Passive Company/Operating Company* section to the top of the *Loan Information* page.
- In the May 14, 2024, release, the underlying schema supporting loan application submissions to E-Tran was updated to schema version 7.4. The following changes have been made to the data mapping in this release:
  - Updated the mapping of indirect owners to support printing of *Indirect Owners* on the revised form.
  - Updated the mapping of direct and indirect owners, as Principals and added required and conditional data points to support passing of information to E-Tran.
  - Updated the mapping of guarantors (borrowers) to support passing of information to E-Tran.
- Subject individuals are no longer sent to E-Tran. The Form 1919 no longer reflects subject individuals.

## Document Changes

The following documents are impacted by this change.

- *Form 1919, SBA 7(a) Borrower Information Form*, has been **revised**.
- *SBA Small Loan Advantage Authorization* and *PLP Loan Authorization Transmittal* are **discontinued** as the SBA no longer requires the submission of these documents.
- Each applicant, borrower or guarantor (as an operating company) is provided *Form 1919*. Previously, only one *Form 1919* was created per transaction.

Some of the key changes to the *SBA 7(a) Borrower Information Form* include:

- Submissions to E-Tran must pass the required information only and not the actual form.

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- Change to require only a single (1) Authorized Representative to complete, certify, and sign the application.
  - Changes to how Beneficial Owners are identified. Direct and indirect owners of the Applicant, whether a natural person or corporation, partnership, etc., must be listed in E-Tran.
  - Modified the application questions concerning prior criminal history were redesigned into a new question (Question 4) to comply with revised regulatory requirements.
  - Modified the list of activities subject to eligibility restrictions to include “lending activities, lobbying activities” (Question 7).
  - Removed the question on citizenship status and replaced with applicant certification.
  - Removed the question regarding child support and replaced with applicant certification.
  - Modified borrower certifications and representations to streamline eligibility and fraud checks.
  - Revised rules on calculating the number of employees and jobs.

## TSP Build: 1.0.0.5714—May 16, 2024

There are no changes impacting the user interface or documents in the May 2024 release.

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**Note:** We expect to release features supporting the latest SBA Form 1919 in an upcoming off-cycle release very soon.

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## TSP Build: 1.0.0.5714—May 14, 2024

### Schema Version 7.4 Support

The SBA has announced that **effective May 15, 2024**, all loan application submissions to E-Tran must adhere to the published schema version 7.4. Accordingly, we have updated the platform to adhere to the new 7.4 loan origination schema definition (SBA\_ETran.7.4.orig.xsd) for loan data submitted to the SBA’s E-Tran portal.

### E-Tran Submission Eligibility Codes

Updated the processing of eligibility rules to align with SBA guidance, **effective May 15, 2024**, requiring *eligibility code 111* to be included on submissions for SBA-supported loan applications. With this change, when all eligibility requirements are satisfied, *eligibility code 111* will be included on the submission with a **yes** value. When code 111 is absent, the submission failed with error; *For Application, answer to eligibility question(s) is mandatory. (944)*.

## TSP Build: 1.0.0.5615—April 18, 2024

There are no changes impacting the user interface or documents.

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## TSP Build: 1.0.0.5590—March 21, 2024

### New Compliance PreCheck Feature for SBA E-Tran Submissions

Introduced the option to perform an analysis using the **SBA Compliance PreCheck** service prior to submitting a transaction. This feature allows lenders to submit transaction data prior to submitting the transaction to E-Tran to check for any potential compliance issues. On the *Summary Documents* page, a new row called **Pre-Check** is available. Click **Submit** in the Pre-Check row to send the transaction data to the Compliance PreCheck service. The service will return the results in the E-Tran status row, including any error codes found during the check.

### Loan Numbers Not Updating on Documents

Corrected an issue where documents were not updated to the correct loan number when the *Transaction Name* value was changed. The expected behavior is that the loan number displayed on documents is updated when the *Transaction Name* is modified.

## TSP Build: 1.0.0.5508—February 15, 2024

### SBA Franchise Directory

Effective May 11, 2023, the SBA no longer supports or maintains the *Franchise Directory* and franchise information is no longer required on an E-Tran transaction. The link and integration to the SBA Franchise Directory has been removed.

Franchise information remains available in the *Franchise* section on the *Eligibility* screen if previously entered. The *Franchise* section is not available for new transactions or existing transactions that had not previously been populated.

## TSP Build: 1.0.0.5482—January 18, 2024

### E-Tran Submissions Now Require a Calendar Basis

Updated the application to conform to SBA rule changes, effective January 15, 2024, that defines the *Calendar Basis* field (*CalendarBasisCode*) as mandatory on a transaction submission. As a result, the schema (SBA ETran version v7.2) was updated to support inclusion of Calendar Basis codes as part of the **Accrual Method** options for Loan Payments.

The *Calendar Basis* is displayed on the loan when submitted to E-Tran. If the **Accrual Method** selected in the application is not valid, a warning message is displayed. For example, if the **Accrual Method** is set as *Actual/Actual*.

### Support Using Middle Names for Loan Officers and other Contacts

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Updated to support the inclusion of middle names for all individual contact types in Administration. If a middle name is provided for the *Responsible Officer*, *Authorizing Officer*, or *Document Return To*, it will now be included as part of the contact name on a transaction.

## Duplicate Records Causing Errors in E-Tran Submissions

Corrected an issue that caused an error when submitting a transaction to E-Trans. The error occurs in cases where a single owner is associated with two or more borrower entities and results in duplicate *PrincipalRace* records being created for the transaction. The issue is resolved and duplicate records are no longer created.

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