Account Escrow and Tax Snapshot

Tax and Insurance Inquiry
PS_TAX_INS_RECS
Application 14313

Overview

This report provides the ability to view escrowed and non escrowed tax and insurance records for an individual account number regardless of whether the records are still active. This report is launched via a DNA slide out to be viewed online. The installation script adds the slide-out to the Core Escrow Inquiry form.

After installation, the Tax/Ins Inquiry report slide-out shows to the far left in screen 14022 Escrow Inquiry. Open the Escrow Inquiry screen by selecting Maintenance – Loan Accounts – search for an account, and then select Escrow Inquiry from the list under Inquiries. Clicking on “Tax/Ins Inq” will execute the report using the account number that is displayed on the Escrow Inquiry screen.

The report has three sections

Summary Info

AcctNbr: XXXXXXXX
Tax Reported For Owner:
Loan Due Date:
Collateral Address:
Escrow Balance: $ X,XXX.XX
Escrow Payment $ XXX.XX

Insurance records

Insurance records display on the screen grouped by insurance type with the records in order by oldest due date. The following fields are listed on the screen for insurance records, with column headings:

Insurance Type – values will be insurance type description, i.e. Homeowners
Payee – Org name – 30 max, i.e , Any State Mutual Insurance
Escrow YN – Y/N indicator on whether premium amount is escrowed
Freq – Calendar period code for premiums, i.e. MNTH, 3YR, ANNU***
Due Date – the next due date for the record, even if in the past, MM/DD/YYYY
Amount – the current premium amount, e.g. $1,667.77

Policy # - from extpolicynbr, i.e. G01KXX5LMN6900
Expiration Date – If populated, this will be the Expiration Date for the insurance policy.
Cancel Date – If populated, this will be the Inactive Date, not the Expiration Date

Taxrecords

Tax records display on the screen grouped by tax type with the records in order by oldest due date. The following fields will be listed on the screen for tax records, with column headings:

Tax Type – values will be tax type description, i.e. City Taxes, Town Taxes
Payee – Org name – 30 max, i.e , Any County Revenue Commission **Escrow**
YN – Y/N indicator on whether tax amount is escrowed
Freq – Calendar period code for tax, i.e. ANNU***
Due Date – the next due date for the record, even if in the past, MM/DD/YYYY
Amount – the current premium amount, i.e. $ 1,667.77
ID – The data from the property tax record, i.e. PPIN 01234 00-11-22-3-44-555.00
Cancel Date – If populated, this will be the Inactive Date

Installation

Using SQL Talk or another SQL application log onto the database and run SETUP_PS_TAX_INS_RECS.SQL
Copy the file named PS_TAX_INS_RECS.SQT into the PS directory which holds your institutions custom code