



SHARES Handbook

Self-Help Automated Reporting and Evaluation System

2023 v4

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Disclaimer

A handbook for grantees of the United States Department of Agriculture (USDA) Section 523 Self-Help Housing Program developed jointly by the Self-Help Housing Technical and Management Assistance (T&MA) Contractors:

- *Florida Non-Profit Housing, Inc. (FNPH)*
- *LIFT Community Action Agency, Inc. (LIFTCAA)*
- *NeighborGood Partners*
- *Rural Community Assistance Corporation (RCAC)*

Funded by: *United States Department of Agriculture, Rural Development*

The work that provided the basis for this publication was supported by funding under an award with the USDA Rural Development (RD). The substance and findings of the work are dedicated to the public. The T&MA Contractors are solely responsible for the accuracy of the statements and interpretations contained in this publication. Such interpretations do not necessarily reflect the views of the Government.

This handbook is designed to provide accurate and authoritative information regarding the subject matter covered. It is distributed with the understanding that the authors are not engaged in rendering legal, accounting, or other professional services. If legal or other expert assistance is required, the services of a competent professional should be sought.

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Region I	Region II
Florida Non-Profit Housing, Inc.	LIFT Community Action Agency, Inc.
P.O. Box 1987	209 North 4 th Street
Sebring, Florida 33871-1987	Hugo, Oklahoma 74743
(863) 385-2519	(580) 326-5165
www.fnph.org	www.liftca.org
Region III	Region IV
NeighborGood Partners	Rural Community Assistance Corporation
363 Saulsbury Road	3120 Freeboard Drive, Suite 201
Dover, Delaware 19904	West Sacramento, California 95619
(302) 678-9400	(916) 447-2854
www.neighborgoodpartners.org	www.rcac.org

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INTRODUCTION

The Self-Help Housing Program

Self-help housing is just as it sounds, participants working to build or repair their own homes. This program is a direct application of the barn raising traditions of pioneering rural Americans. The Self-Help Program began as the Mutual Self-Help Housing method, where participants, working in groups, supply the necessary labor to build their homes, having qualified for mortgage financing to purchase land, building materials, and some subcontracted work on the more technical items. The program authority also allows for two additional methods of home repair (owner-occupied and acquisition rehab).

Regardless of the method selected, the participants must be low or very low income. At least 40% of the total participants served should be in the very low-income category. The remaining participants must be in the low-income category (see income map for details:

<https://www.rd.usda.gov/sites/default/files/RD-DirectLimitMap.pdf>).

Mutual Self-Help Method: With the assistance of skilled staff, a group of generally 4 to 10 households is formed. The regulation requires a minimum of 4 households; we encourage a group of at least 5 households as this makes for a better program. The participants typically select lots, house plans, and apply for individual mortgage loans. While participants await loan approval, the group studies the responsibilities of homeownership, construction techniques, tool usage, safety, homeowner's insurance, taxes, home maintenance, and money management. This time is known as the pre-construction stage.

Once the mortgage loans are closed, the group begins to build under the guidance of a skilled construction supervisor. The participants must complete a minimum of 65% of the construction labor tasks; usually the more technical work such as electrical, plumbing and HVAC is subcontracted out. The construction stage typically lasts from 8 to 12 months, depending on the size of the group and other factors. Participants work during their spare time (evenings, weekends, and days off) so as not to interfere with the regular household employment.

Self-Help Rehab Method Options:

Acquisition Rehabilitation: With the assistance of skilled staff, an applicant repairs a home that they purchase. The participant applies for a loan and/or grant and once qualified, they enter into a contract to purchase a property. The property is inspected, and a scope of work is developed. This information is submitted to Rural Development for approval. Once the loan is approved and closed, the participant, under the guidance of a skilled construction supervisor, completes selected tasks from the scope of work. Usually, more technical work such as electrical, plumbing and HVAC is subcontracted out.

Owner-Occupied Rehabilitation: With the assistance of skilled staff, an applicant repairs a home that they already own and reside in. The participant applies to be in the program and then they may need to apply for a loan and/or grant. Once qualified, they provide proof of ownership and residency. The property is inspected, and a scope of work is developed. This information is submitted to Rural Development for approval. The participant, under the guidance of a skilled construction supervisor, completes selected tasks from the scope of work. Usually, more technical work such as electrical, plumbing and HVAC is subcontracted out.

Rural Development

Rural Development is an Agency of USDA. The Rural Development mission is to help rural Americans improve the quality of their lives. Rural Development helps rural communities meet their basic needs by building water and wastewater systems; financing decent, safe, sanitary, and affordable housing; supporting electric power and rural businesses, including cooperatives, and supporting economic and community development with information and technical assistance.

Rural Development has been providing funds for the Self-Help Housing Program since the late 1960s. They provide Section 523 Self-Help Housing Technical Assistance grants to eligible entities to start and implement the program. Rural Development thoroughly reviews the self-help application before a grant is awarded and will continue to monitor and provide oversight in the areas of construction and administration, through quarterly meetings, construction inspections, and participant accounts throughout the term of the grant.

In most cases Rural Development provides another important ingredient to the self-help program; construction to permanent financing at favorable interest rates in the form of a Single-Family Housing Direct Home Loan (Section 502). They are independent of private or conventional lending institutions, and the financing is directly between Rural Development and the borrower. Each applicant must qualify and obtain a loan individually from Rural Development. Rural Development's function as a lender is significant because private credit institutions in rural areas are relatively few in number, smaller, and often impose more rigid terms which can be a barrier to homeownership.

Rural Development Offices

Rural Development operates from three levels: national, state, area /local. The Rural Housing Service Administrator in the National Office and the State Directors are politically appointed – all others are federal civil service employees.

Rural Development National Office

The Rural Development National Office is responsible for developing policy, interacts with Congress for legislation, managing program funding, and much more. They also obligate and monitor all Section 523 self-help grants, maintain reports and statistics on operating self-help organizations and project needs for funding. At the national level, USDA has a separate Appeals Division that hears appeals on actions unresolved at the state level.

Rural Development State Office

Section 502 home loan funds are allocated on a state-by-state basis and obligated at the State Office level. Each state receives 502 funds based on a formula allocation calculated by the National Office. A Funding Unnumbered Letter is released annually specifying the fiscal year allocations for each housing program, set-asides, and state allocations, etc. Staff members who are key to the operation of a self-help program located in the State Offices are the:

- Rural Development State Director – Has the authority to sign grant agreements.
- Rural Housing Program Director – Typically oversees the self-help program.

- Rural Development Housing Specialist – Reviews and approves the 502 direct loans and 504 grant/loans, also approves building sites, and completes environmental reviews.

Rural Development Area/Local Offices

In most states grant monitoring has been retained at the State Office level with the Single-Family Housing Program Director, but in some cases, it has been assigned to the Area/Local Office. In any case, the Rural Development grant manager is responsible for ensuring that the grant is operated effectively and in accordance with the regulations. At this level of Rural Development, the Loan Specialist is typically responsible for making the Section 502 home loans to participating applicants of each self-help group. They will be responsible for monitoring the 502 loans and will also be the co-signer on the participant's Supervised Bank Accounts and will process the construction draws. They are also the personnel who will convert the loans once the local jurisdiction has completed the final inspection and issued a Certificate of Occupancy.

Rural Development Section 502 Single Family Direct Home Loan

Most applicants that participate in the self-help housing program use Rural Development's Section 502 home loan program to finance their homes. Section 502 loans are only available for homes in eligible rural areas as defined by USDA

(<https://eligibility.sc.egov.usda.gov/eligibility/welcomeAction.do?pageAction=sfpd>). In order to qualify for a Section 502 loan, prospective self-help applicants must meet Rural Development income eligibility requirements as low-income or very low-income (see the income map for details: <https://www.rd.usda.gov/sites/default/files/RD-DirectLimitMap.pdf>). They must be credit-worthy, have repayment ability for the loan requested, and be unable to secure a mortgage from other sources. The income limits, developed in consultation with the U.S. Department of Housing and Urban Development, are subject to local variation and are published annually. Current information on income limits and eligibility requirements for Section 502 loans is available at RD local offices or online (links above).

The repayment period for the Section 502 loan is either 33 or 38 years, and the interest rate is between 1% and the current market rate. The actual rate of interest the borrower pays depends on the borrower's income, as does the loan term. If a borrower is eligible to pay less interest than the market rate, the borrower then receives a subsidy called "payment assistance." The amount of payment assistance a borrower receives is determined by the loan amount, loan period, and the household income. The payment is either determined based on 24% of their monthly income or the loan at a 1% interest rate, whichever is the higher of the two, but can never be higher than the loan at full note rate. The assistance makes up the difference between the full loan interest rate and the interest rate the participant pays. A portion of this subsidy must be repaid at time-of-sale or loan payoff based on equity, time, etc. This process is called subsidy recapture.

Some other benefits of a 502 loan are that there is no requirement for a down payment, closing costs can be included in the loan (up to the appraised value with authorized exceptions to include the tax service fee, homeownership education fee, appraisal fee, and any required contribution to an escrow account for taxes and insurance (excluding the first-year insurance premium)) and there is no requirement for private mortgage insurance. Rural Development can offer a moratorium on loan payments for up to two years if a borrower's income decreases by at least 20% by no fault of their own.

During construction, Section 502 funds are advanced from the Rural Development finance office in St. Louis and disbursed by the local offices to the self-help grantee. Grantees prepare the drawdowns and checks for each participant's account as needed to purchase materials for different phases of construction. This funding can be used for either new construction, acquisition rehab and in certain circumstances, owner-occupied.

Rural Development Section 504 Single Family Housing Repair Loan & Grant

Also known as the Section 504 Home Repair program, this provides loans to very-low-income homeowners to repair, improve or modernize their homes or grants to elderly (62 or older) very-low-income homeowners to remove health and safety hazards or remodel a dwelling to make them accessible to a household member with a disability. The maximum loan is \$40,000 and the maximum grant amount is \$10,000. This funding could be used with the owner-occupied rehab program, or other funding could be sought.

The 523 Self-Help Housing Technical Assistance Grant

For organizations to operate a self-help housing program, Rural Development provides technical assistance (TA) grants. The TA grant is for a period of up to two years, and is available to nonprofit organizations, federally recognized Tribes, and units of state or local government. The amount of grant funds an organization can receive is based primarily upon how many houses they build or repair in a grant period. For new construction programs, an organization can receive up to 15% of the average cost of a similar new home in their area, for every home they are planning to build. Check with your Contractor for other methods of determining grant amounts for repair programs.

Allowable uses of Section 523 technical assistance grant funds include:

- Recruit eligible households to participate in the self-help program.
- Hold training meetings with participants on the self-help process and homeownership topics such as mortgages, insurances, taxes, and maintenance.
- Assist participants to obtain and develop building sites; obtain or create Rural Development-approved house plans and help participants select theirs.
- Help participants bid and select building supplies and subcontractors; train participants in construction techniques and provide construction supervision.
- Supervise participant Section 502 loan accounting, including:
 - Totaling invoices and itemizing payments to suppliers and subcontractors.
 - Maintaining records of deposits and withdrawals.
 - Preparing checks (accompanied with invoices and statements).

Disallowed activities using Section 523 Technical Assistance grant funds are:

- The use of any TA funds to pay staff to provide labor on the houses.
- Purchasing any real estate or building materials for participating families.
- Paying any debts, expenses or costs which should be the responsibility of the participating families.
- Any lobbying activities as prohibited in 2 CFR 200 subpart F.

Regulations

The main regulation that governs the Self-Help Housing Program, RD Instruction 1944-I, can be downloaded from the following web-link: <https://www.rd.usda.gov/files/1944i.pdf>. Additionally, USDA Rural Development provides an overview and guidance for the Self-Help Housing Program in the [USDA RD Handbook 3550 Appendix 13](#). Appendix 13 guidance includes an overview of the following:

- Overview of Self-Help Housing
- Application Processing Priority
- Self-Help Loan Application Packaging
- Environmental Reviews
- Appraisals
- Loan Approval and Closing
- Selecting a Contractor
- Construction Documents
- Sub-Contracts
- Administering Construction Funds
- Self-Help Inspections
- Post Closing Leveraged Loans/Grants
- Participant Withdrawal
- Construction Closeout
- Self-Help Take-out Loans
- Other Loan Financing
- Rural Eligibility Reviews

The T&MA Contractors

Rural Development contracts with four Technical and Management Assistance (T&MA) Contractors to assist operating and potential self-help housing grantees. This assistance ranges from staff and board training, grant management, and development of applications to 502 loan program and processing training, newsletters, and conferences, among other services. These services are provided at no cost to the grantee.

The four contractors are:

- Florida Non-Profit Housing – covering Region I, the Southeast, including the states of AL, FL, GA, MS, NC, SC, TN, Puerto Rico, and the Virgin Islands.
- LIFT CAA fka Little Dixie CAA – covering Region II, the South-Central US, including the states of AR, KS, LA, MO, ND, NE, NM, OK, SD, TX, and WY.

- NeighborGood Partners fka NCALL – covering Region III, the Northeast and Midwest, including the states of CT, DE, IA, IL, IN, KY, MA, MD, ME, MI, MN, NH, NJ, NY, OH, PA, RI, VA, VT, WI, and WV.
- Rural Community Assistance Corporation (RCAC) – covering Region IV, the Western US, including the states of AK, AZ, CA, CO, HI, ID, MT, NV, OR, UT, WA, and the Western Pacific.

Self-Help Training Handbooks

The T&MA Contractors have produced a variety of training materials for the purpose of assisting grantees and training grantee staff. The following is a list of the available self-help handbooks. Please contact your T&MA Contractor for a copy or for more information.

- Accounting for Individual Borrower 502 Loan Accounts Handbook
- Acquisition and Owner-Occupied Rehab Handbook
- Board of Directors Governance Guide
- Construction Supervisor Handbook
- Custodial Accounting for Mutual Self-Help
- Feasibility Handbook
- Financial Management Handbook for Federally Funded Organizations
- Group Coordinator Handbook
- Orientation Handbook
- Orientation for Grantees PowerPoint
- Pre-Construction Meeting Handbook
- Program Director Handbook
- Section 523 Self-Help Housing Application Training PowerPoint
- Section 523 Technical Assistance Grant Application Handbook
- Self-Help 502 Loans Guidebook
- SHARES Handbook

CHAPTER 1 – Introduction to SHARES

WHAT IS SHARES?

SHARES is an acronym for Self-Help Automated Reporting and Evaluation System. It is a web-based application designed to manage, track and evaluate the status of the Self-Help Housing Section 523 Grant Program as well as share this information with all parties who provide assistance to the program.

The application is divided into two distinct Modules (Files). From the SHARES Home page, you can access a Table of Contents page that includes a host of topics that provide background information on the 523 Grant Program. This background information includes the 1944-I regulations, and exhibits that govern the delivery of the Self-Help Housing program. Other topics link the user to related web sites such as those dealing with building codes or the weather across the nation. The intent was to provide the user with a ready reference to the information related to the 523 Grant Program.

The second component of SHARES is the automated application itself. The application allows the user to enter Grant related information and generate reports, including the quarterly SHARES Report. Multiple users can access the data using the internet with their web browser, though all web browsers may not be supported. This precludes the need to install the application on user computers. The data is stored in a centralized database and thus is available for reporting as soon as any updates have been saved to the database by the user entering it.

WHO CAN ACCESS SHARES?

The SHARES system is used by grantees, contractors, USDA Rural Development (RD) office staff and RD National Office staff. Security is designed so that grantees can only see and update their own grants. Contractors can only view, and update grants associated to the grantees they support. RD office staff can only view, and update grants they are set up to service. RD National Office staff can see and update all grants.

HOW IS SHARES DESIGNED?

To provide greater ease of use, the SHARES application is broken up into four major modules: Grant Module (File), Borrower Module (File), Entity Module and Report Module. SHARES is structured and designed based on the 1944-I Instructions.

Grant Module (File) – designed for users when they are reviewing, entering, or updating Grant level data or want to view all the Houses or Lots related to a Grant file. Screens (or tabs) related to the Grant

Module (file) include Grant, Grant Funds, Offices (serving that grant), Grant Reviews, Lots, Houses (delete only), Problems, Grant Metrics and Grant Comments. (Also referred to as a Grant File)

Borrower Module (File) – designed for users when they are reviewing, entering, or updating Borrower level data. Screens (or tabs) related to the Borrower Module (File) include Borrower, Dates, Borrower Funds, Lot, House, Construction, Grant (read-only) and Borrower Comments. (Also referred to as a Borrower File).

Entity Module – designed for users when they are reviewing, entering, or updating Grantee or Contractor level data. Screens (or tabs) related to the Entity Module include Entity, Address, Contacts, Individuals, and Entity Comments.

Reports Module – presents a menu from which the user can select the report they want to generate, followed by a screen to allow them to select various filters to limit the data displayed on the report selected.

WHO CAN I CONTACT FOR HELP?

To assist the Grantees in the use of the SHARES application, the USDA National Office has enlisted the help of several Technical Resource Coordinators (TRCs) from each of the four regions. The TRCs are part of the T&MA (Technical & Management Assistance) Contractor staff. They work closely with the Grantees in their region to assist them in executing the Self-Help program and the SHARES application. They can also provide additional training when necessary.

As of the publication of the document, below is a link to the names, phone numbers and email addresses of the Technical Resource Coordinators who can help you.

[List of SHARES contacts](#)

You will be required to login to gain access to the list of contacts.

Important Note: Print or PDF Print the Help Page from SHARES to keep a list of contacts available to you even when offline.

CHAPTER 2 – GETTING STARTED

WHAT IS NEEDED TO GET SHARES ACCESS?

To gain access to SHARES you must have the following:

- * Level 2 eAuth ID.
- * Internet Access – Broadband access is strongly recommended.
- * Any web browser.
- * Be assigned Rural Development security to your proper SHARES Role (i.e., Grantee, Contractor, RD office, RD National Office, SHARES Administrator). This will be handled through the RD National Office in conjunction with RD Security.

HOW TO REQUEST ACCESS TO SHARES

Level 2 eAuth ID and verification is required for SHARES access.

If you already have access to eForms, jump to the last paragraph in this section.

To request access, you will need to navigate to <https://shares.sc.egov.usda.gov> and follow the directions below. It is strongly recommended that you save the URL for SHARES as a bookmark in your browser for future use. Many government systems have similar looking pages, so be sure you are only using the URL above.

Click Create Account.

Sign up as a “Customer” then enter your email address and Click Submit.

An official website of the United States government [Here's how you know](#)

USDA eAuthentication
U.S. DEPARTMENT OF AGRICULTURE

eAuth

HOME CREATE ACCOUNT MANAGE ACCOUNT HELP

Account Registration ?

What type of user are you?

☒ Customer

☐ USDA Employee / Contractor

☐ Other Federal Employee / Contractor

Continue

An official website of the United States government [Here's how you know](#)

USDA eAuthentication
U.S. DEPARTMENT OF AGRICULTURE

eAuth

HOME CREATE ACCOUNT MANAGE ACCOUNT HELP

Customer Account Registration ?

Please enter your email address

Email Address

shares@rcac.org

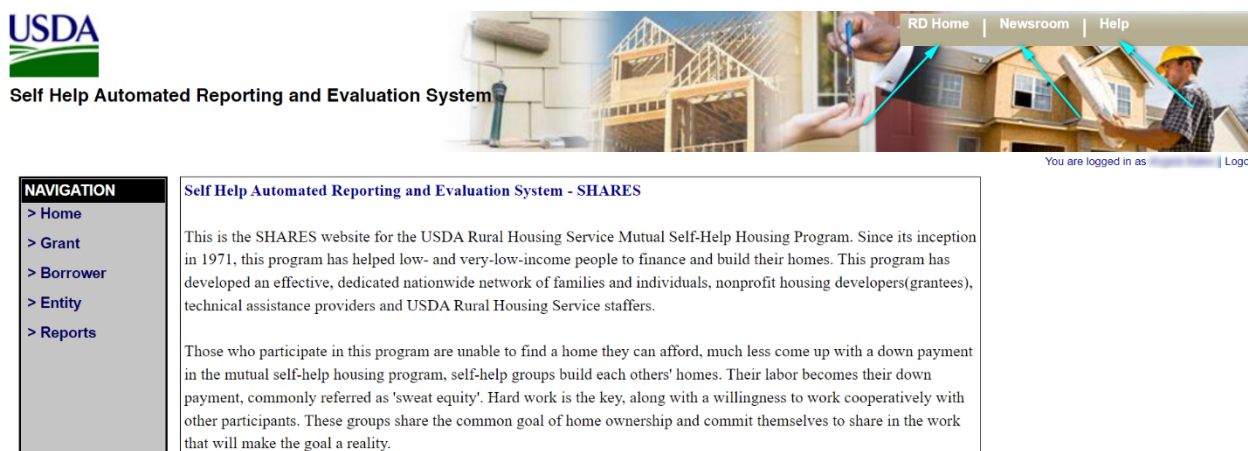
Submit

You will receive a confirmation email within an hour. After you have received the email, it will ask you to identify yourself via the online system. If you are unable to verify your identity through the system, the system will direct you to go to an RD or Farm Service (RD-LRA) location near you. Be sure to take your photo ID with you.

After your ID has been verified, contact your TRC for your service area and provide them with your full name, the email address used for your eForms access, and full company contact information. This will enable them to request activation of your SHARES account. Once your account has been activated, your TRC will notify you.

CHAPTER 3 – GETTING TO KNOW SHARES

The SHARES application is comprised of four Modules (two of which are also referred to as Files) as referenced earlier) and a Home screen. Within the Home screen, users can access RD Home Page, Newsroom, and a Help screen.



RD HOME PAGE

This will take you to the U.S. Department of Agriculture’s main website, where you can access information about USDA and programs within the USDA, as well as articles and contact information.

NEWSROOM

This will take you directly to the USDA Rural Development’s Newsroom where you can view News Releases, Stakeholder Announcements, Tribal Outreach, Success Stories, Federal Funding Opportunities, and USDA Radio.

HELP PAGE

The Help Page will let you have access to this handbook, contact information for all T&MA Contractors’ SHARES Coordinators, eAuth ID Help Desk contact information, Local State Office information, National Office contact information and Rural Development Help Desk contact information.

INFORMATION CONTAINED IN EACH MODULE

Grant Module (File)

Screen/Tab Title	Description
Grant Search Submenu	Search for Grants based on various Search criteria.
Grant Add Submenu	Add a new Grant to the system.
Grant List Screen	List of Grants that matched a Grant Search's criteria. Allows a user to open a specific Grant for inquiry of Grant related details or to update Grant related details.
Grant Tab	Enter new Grant information or update a searched Grant's information.
Grant Funds Tab	Enter, update, and delete Funds received and used related to the grant.
Offices Tab	Associate the RD Offices that service the grant.
Reviews Tab	Enter, update, and delete Reviews related to the grant.
Lots Tabs	Lists Lots related to the Grant and allows the user to add, update and delete Lots.
Houses Tab	Lists Houses related to a Grant and allows the user to view and delete Houses.
Problems Tab	Enter, update, and delete Problems and/or Comments related to the Grant that will show on the SHARES Report.
Metrics Tab	Displays various metrics of the current Grant, borrowers, funds, and EUs.
Comments Tab	Enter, update, and delete Comments related to the Grant for internal purposes.

Borrower Module (File)

Screen/Tab Title	Description
Borrower Search Submenu	Search for Borrowers based on various Search criteria.
Borrower Add Submenu	Add a new Borrower to the system.
Borrower List Screen	List of Borrowers that matched a Borrower search's criteria. Allows a user to open a specific Grant Borrower for inquiry of Borrower-related details or to update Borrower related details.
Borrower Tab	Enter new Borrower information or update a searched Borrower's information.
Dates Tab	Enter, update, and delete pre-construction dates related to the Borrower's application and loan process.
Borrower Funds Tab	Enter, update, and delete funds related to the Borrower.
Lot Tabs	Lists lot and address information related to a Borrower's lot and allows the user to assign an existing lot to the borrower.
House Tab	View, enter, and update house information related to the borrower.
Construction Tab	Enter, update, and delete start and end dates for each construction tasks related to a Borrower. (Pre-construction dates on this tab will auto-fill from Borrower Dates tab.)
Grant Tab (Read-Only)	Displays the same information as the Grant Tab in the Grant File for read only.
Comments Tab	Enter, update, and delete Comments related to the Borrower for internal purposes.

Entity Module

Screen/Tab Title	Description
Entity Search	Search for Entities based on various Search criteria.
Entity List	List of Entities that matched an Entity Search's criteria. Allows user to link to a specific Entity for inquiry of an Entity's related details or to update an Entity's related details.
Entity	Enter and update details related to the Entity.
Entity Address	Enter, update, and delete an Entity's addresses.
Entity Contacts	Add, update, or delete an Entity's contact information.
Entity Individuals	Add, update, or delete an Entity's key personnel and roles.
Entity Comments	Enter, update, or delete Comments related to an Entity.

Reports Module

Report	Description
List of Self-Help Contractors and Grantees	Contact information for all Grantees in the system as well as all T&MA Providers in the country.
List of Grant Records in SHARES	Full list of every grant start and end dates and the proposed homes under each grant.
Average Housing Statistics for Each Grant	Average square footage, number of bedrooms, number of baths, appraised value, and RD loan amount for each grant. Historical and statistical base for changes from grant to grant.
Average Unit Cost for Each Grant	Lists 523 grant funds used, total grant funds, approved cost per unit, Equivalent Units (EU's) completed and cost per unit for 523 funds. Provides tracking of expenses and showing changes in unit costs.
502 Loans Funded for All Grants in Selected Periods	Lists Borrowers, low or very-low-income designation, loan closed date, appraised value, equity, 502 loan amount, other funds amount, and total funds and averages of the appraised values, equity, 502 loans, other funds, and total funds for all borrowers.
Grant Funds Report	Lists all grant funds received, funds used, other funds used, approved cost per unit, actual cost per unit, total funds used, total 523 funds used, 523 balance, proposed home amount, and EUs earned. Should be provided at Quarterly Review Meetings.
Lot Information Report	List of lot numbers, lot status, lot description, location, borrower assigned, lot square footage, sale price, development fees, water, sewer, total number of lots, total lots assigned to borrowers, total lots not assigned to borrowers.
Borrower Demographics Report	Lists borrower name, borrower group, status, docket status, docket status date, funding income designation, occupation, household size, type of dwelling, disabled, extended, deficient housing, 502 account number, congressional district, ethnicity, gender, marital status, energy efficiency and the totals for low income, very-low income, families with loan pending, families with loan rejected, families with loan withdrawn, families with loan closed.
Borrower Fund and Equity Matrix	Lists grant name, grantee name, borrower, group, lot number, address, income designation, household size, annual income, adjusted income,

Report	Description
	loan limit, RD loan, other leveraged loan, deferred loan, grants, total funding, appraised value, equity, total families in grant, total families with approved loans, and total families with pending loans.
Grant Construction Report	Lists grant name, grantee name, borrower name, group, lot number, pledged points, construction start date for borrowers, construction end date for borrowers, month elapsed, tasks completed, construction points, total EUs for each borrower and total EUs for all borrowers.
Construction Task Matrix for All Families	Lists end dates for completion of each of the 27 tasks for all borrowers currently building.
SHARES Report	Summary report including grant period, grantee name, grantee address, grant name, duration, counties served, grant start date, grant end date, grant extension date, total actual and planned EUs for the period, total actual and planned EUs for this grant-to-date, preconstruction EU's for the period, preconstruction EUs for period for loans pending, total number of houses for each method, average housing statistics, number of proposed units, number of houses completed under grant, number of families in preconstruction, number of families contacted, number of very-low income families, number of low income families, number of construction supervisors, number of TA employees, number of loan dockets approved or rejected, number of loan docket rejections for grant to date, comments for any adverse issues affecting the grantee's ability to accomplish goals.

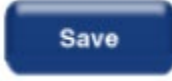
SCREEN CONTROLS

To ease the navigation of the SHARES application to enter, update, and delete information related to Self-Help Grants, its Borrowers, home construction, and other related information, the user has various screen controls available such as:

The left Navigation menu allows the user to switch to a different SHARES module from anywhere in the application. The user can move their mouse over the items in the Navigation menu and be presented with a choice to add a new Grant or Search for a Grant to update its details, add a new Borrower or Search for a Borrower to update their details, Add a new Entity or Search for an Entity to update its details or be presented with the Report menu.



The SHARES application has several buttons available to allow the user to perform significant actions such as “Save” or “Cancel” and notifications informing the user of the status of their data input.

	Allows the user to submit criteria entered into search boxes, checkboxes, or radio buttons.
	Allows the user to return to the previous screen and cancel out of any changes they have made without saving them to the database.
	Allows the user to save to the database the changes they have made on the current screen and/or previous screens. At some points in the application, the user will be required to save changes or fill in required data before changing screens.
	Allows the user to delete an item of data if there are not interconnected data items related to the deletion. (Ex. A Grant cannot be deleted without deleting any houses, lots or borrowers that are connected to the grant first)
	Allows the user to add another row of fields into which data can be entered. The button is present in Grant Extensions, Grant Funds, and Borrower Funds screens among others.
	Allows the user to copy selected Construction Task Pledges from one Borrower to the rest of the

	Borrowers in the same Group.
 Delete Row Icon	Allows the user to delete a row of data. The Save button must be clicked in order to keep changes to data rows.
 Radio Button Icon	Allows the user to select only one item from a list of two or more items.
 Check Box Icon	Allows the user to select or deselect a given item or to select one or more items from a list.
 Calendar Icon	Presents the user with a calendar control allowing the user to select a date to be placed in the date field adjacent to the icon.
 Search Icon	Presents the user with a search screen for producing a list of data items that can be associated to the current Grant, Borrower, or other entity.
 Drop-Down List	Allows the user to select one item from a drop-down list.
Borrower Search Borrower List Borrower (Breadcrumbs or Hyperlink Path)	Clicking the desired "Breadcrumb"/Hyperlink for the current data search allows the user to return to the active search screen or results list without having to re-enter search criteria. The hyperlink path (or "Breadcrumbs") is displayed near the top left of the screen following a search for grant, borrower, or entity.
	Chevron controls appear throughout the application at the top of the List pages to allow the user to change the sorting criteria for the column to or from ascending to descending or vice versa.
 Data sucessfully saved.	Notification that your data has been successfully saved. Should always show after clicking the Save button.

CHAPTER 4 – REVIEWING & UPDATING ENTITY INFORMATION

Entity Tab

- Hover mouse over Entity in Navigation menu.
- Click on Search Entity.
- Enter Entity Name in the Entity Name field or choose Entity Type, Status, Region, or State in each drop-down menu for those fields.
- Click Submit.
- Click on Entity Name in the list to open the Entity Module.

NAVIGATION

- > Home
- > Grant
- > Borrower
- > Entity
- > Reports

Self Help Automated Reporting and Evaluation System - SHARES

This is the SHARES website for the USDA Rural Housing Service Mutual Self-Help Housing Program. Since its inception in 1971, this program has helped low- and very-low-income people to finance and build their homes. This program has dedicated nationwide network of families and individuals, nonprofit housing developers(grantees), lenders and USDA Rural Housing Service staffers.

Those who participate in this program are unable to find a home they can afford, much less come up with a down payment in the mutual self-help housing program, self-help groups build each others' homes. Their labor becomes their down payment, commonly referred as 'sweat equity'. Hard work is the key, along with a willingness to work cooperatively with other participants. These groups share the common goal of home ownership and commit themselves to share in the work that will make the goal a reality.

Entity List

Entity Name ▲	Entity Type ◆	Status ◆	Region ◆	State ◆
Test Entity	Grantee	Active	South Central	MO

Confirm that all Entity information is correct. If any information needs to be updated, Click on each field and enter the information or choose from the drop-down menu for those fields; then Click Save.

Entity

Entity | Address | Contacts | Individual

Save **Delete** **Cancel**

Entity Name: * Entity Type: *

Status: * Region:

Address Tab

Click on the Address Tab and review the information. Ensure that the Street and Mailing address information is correct. If any information needs to be updated, Click on each field and enter the information or choose from the drop-down menu for those fields; then Click Save.

Entity

Entity Address Contacts Individual

Save Cancel

Street Address

Address Line 1: 12345 West Main Address Line 2:

City: Hometown

State: MO

Zip Code: 63026

County: St. Louis Congressional District:

Mailing Address

Address Line 1: 12345 West Main Address Line 2:

City: Hometown

State: MO

Zip Code: 63026

Contacts Tab

Click on the Contacts Tab and review the information. The contact information in this Tab will include Primary phone number for the office, Fax Number, Email Address, Website URL and Cell Phone. If any information needs to be updated, Click on each field and enter the information or choose from the drop-down menu for those fields then Click Save.

To Delete a line, Click on the X next to the line you would like to delete; then Click Save.

Entity

Entity Address Contacts Individual

Save Cancel

Entity Name: Test Entity Entity Type: Grantee

Status: Active Region:

Contacts

Contact Type Contact Information

X Primary Phone 000-000-0000

X Web Site URL www.test.org

X E-Mail Address test@test.org

X SHARES Coordinator 222-222-2222

Add

Important Note – It is important to ensure your organization's contact information is up to date. The data

from this Tab is used on the List of Self-Help Contractors and Grantees Report. This report is a good source of contact information for all grantees if the information is accurate.

Individual Tab

Click on the Individual Tab and review the information. The information in this tab will include the Last Name, First Name, Middle Name and Title of each staff member that works in the program in any capacity. If any information needs to be updated, Click on each field and enter the information or choose from the drop-down menu for those fields then Click Save.

To Delete a line, Click on the X next to the line you would like to delete then Click Save.

Entity

Entity Address Contacts **Individual**

Save **Cancel**

Entity Name: Test Entity **Entity Type:** Grantee
Status: Active **Region:** West

Individuals

	Last Name	First Name	Middle Name	Title
X	Schmitz	Bernie	M	Business Analyst
X	Jacobsen	Nancy		SHARES POC
X	Baker	Anne		SHARES POC
X	Baker	Angela		SHARES POC

Add

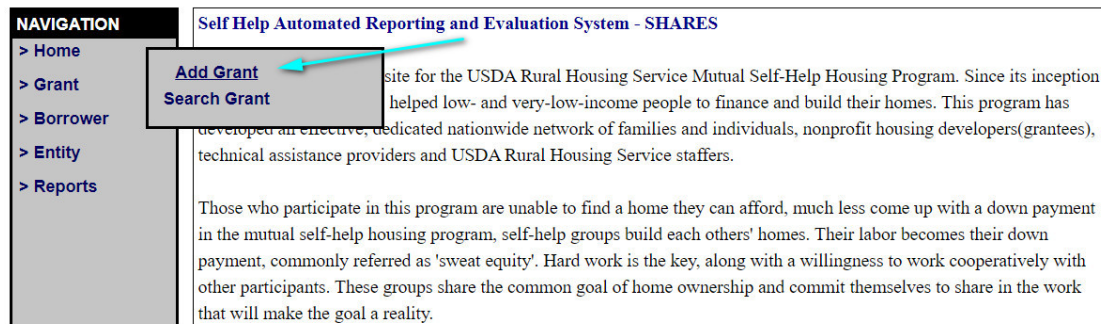
Important Note – It is important to ensure your organization's staff information is up to date.

CHAPTER 5 – THE GRANT MODULE (FILE)

ADDING A NEW GRANT

Hover mouse over Grant in Navigation menu.

Click on Add Grant.



Grant Tab

Begin entering all relevant information into the Grant Tab.

Important Note - When entering a Grant Name, be sure to use a unique name for your grant and include the grant years as shown in the example below. Using unique names will eliminate any data overlap issues in the future.

You must choose either Current Grant or Pre-development in the Status field from the drop-down list.

To enter the Grantee Name, Click on the Magnifying Glass to choose your organization.

In the Contractor field, choose the correct T&MA contractor for your region from the drop-down list.

Grant

Grant Grant Funds Offices Reviews Lots Houses Problems Metrics Comments

Save Cancel

Grant Name: * Eureka 12/2021-12/2023

Status: * Current Grant

Contractor: * Rural Community Assistance Corporation

Proposed Number of Homes: * Florida Non-Profit Housing, Inc.
LITTLE DIXIE COMMUNITY ACTION AGENCY, INC.
NCALL Research, Inc.
Rural Community Assistance Corporation

Proposed Grant Amount:

Pre-Dev Start Date:

Pre-Application Date:

Grant Start Date:

Initial Grant Amount:

Number of TA Staff:

Grantee Name: * Test Entity

State: * CO

County:

Pre-Development Amount:

Proposed Grant Period:

Pre-Dev End Date:

Application Date:

Grant End Date:

Construction Supervisors:

Click the Magnifying Glass in the County field to choose the county or counties served. After the Sub screen comes up, choose the State from the drop-down list. Leave the county blank if you need to add more than one county to the list. If you only need one county, type the county name in the county field.

Grant

Grant Grant Funds Offices Reviews Lots Houses Problems Metrics Comments

Save Delete Cancel

Grant Name: * Eureka 03/2021 - 03/2023

Status: * Current Grant

Contractor: * Rural Community Assistance Corporation

Grantee Name: * Test Entity

State: * CO

County:

Submit Cancel

County Name: State: CO

Submit Cancel

County Name: Alamosa State: CO

You will be taken to an additional if you are looking at all counties in the State. Click on each box next to the counties that need to be added then Click Submit.

County List

County	State
☐ Adams	CO
☒ Alamosa	CO
☐ Arapahoe	CO
☐ Archuleta	CO
☐ Baca	CO
☐ Bent	CO
☐ Boulder	CO
☐ Broomfield	CO
☐ Chaffee	CO
☐ Cheyenne	CO
☐ Clear Creek	CO
☐ Conejos	CO
☒ Costilla	CO
☐ Crowley	CO
☐ Custer	CO
☐ Delta	CO

Enter the rest of the fields based on the information for each field below; then Click Save. To ensure that the data has been saved correctly, look for the *Data Successfully saved* notification that will appear at the top of the page.

Field	Description of Field Information
Proposed Number of Homes	Number of homes to be built during the full grant period.
Pre-Development Amount	The amount of any Pre-Development grant monies that were awarded.
Proposed Grant Amount	Total grant amount that your organization applied for.
Proposed Grant Period	Total months for grant period (grants always start at 24 months).
Pre-Dev Start Date	Start date of any pre-development work.
Pre-Dev End Date	End date of any pre-development work.
Pre-Application Date	Date your organization started the process of notifying USDA RD of your organization's intention to apply for the grant.
Application Date	Date the full application with all correct documentation was submitted to USDA RD.
Grant Start Date	Date your organization's grant started based on your official Grant Agreement.
Grant End Date	Date your organization's grant ends based on your official Grant Agreement.
Initial Grant Amount	Full grant amount that was awarded.
Construction Supervisors	Total number of construction supervisors.
Number of TA Staff	Total number of TA staff working in the program including the total number of construction supervisors.

Grant Funds Tab

All Grant Funds as well as any supplemental funds that are being used to run the program should be entered into the Grant Funds Tab.

- Begin in the Funds Used section by Clicking the drop-down menu under Source to choose either 523 Grant or Other as the source of funds.
- Enter a description of the funds that were used. This would generally be the time period that the funds cover.
- Click on the Calendar Icon to choose the correct date for the funds used through.
- Click on the Amount Field and enter the total number of funds used for that source.
- To Add an additional line, Click on the Add button at the bottom of the section.
- To Delete an unwanted line, Click on the X Icon next to the line you want to delete.

Source *	Description *	Date *	Amount *
X 523 Grant	Monthly Expenses May 2021	05/31/2021	\$16,700.00
X Other	Monthly Expenses May 2021	05/31/2021	\$4,000.00
X 523 Grant	Monthly Expenses April 2021	04/30/2021	\$15,000.00
X 523 Grant	Monthly Expenses March 2021	03/31/2021	\$16,700.00
Total 523			\$48,400.00
Total Other			\$4,000.00
Total			\$52,400.00

Add

- Next, move to the Funds Received section
 - Click the drop-down menu under Source to choose either 523 Grant or Other as the source funds.
 - Enter a description of the funds that were received. This would generally be the draw number and group number it is covering.
 - Click on the Calendar Icon to choose the correct date for the funds used through.
 - Click on the Amount Field and enter the total number of funds received for that source.
- To add an additional line, Click on the Add button at the bottom of the section.
- To Delete an unwanted line, Click on the X Icon next to the line you want to delete.

Funds Received			
Source *	Description *	Date *	Amount *
☒ 523 Grant	Draw 3 - Group 1 & 2	05/31/2021	\$16,700.00
☒ Other	Fundraising	05/31/2021	\$4,000.00
☒ 523 Grant	Draw 1 - Group 1	04/30/2021	\$16,700.00
☒ 523 Grant	Draw 2 - Group 1	04/30/2021	\$15,000.00
Total 523			\$48,400.00
Total Other			\$4,000.00
Total			\$52,400.00

Offices Tab

The Offices Tab is used to keep track of the Rural Development Servicing Offices that serve your organization's area. To choose the Servicing Offices:

- Click on the Magnifying Glass Icon.

Grant	
Grant	Grant Funds
Offices	Reviews
Lots	Houses
Problems	Metrics
Comments	

Grant Name: Eureka 03/2021 - 03/2023
Status: Current Grant
Start Date: 03/31/2021

Grantee Name: Test Entity
State: CO
End Date: 03/30/2023

Servicing Office	
Rural Development Servicing Office	Office Type
523 Disbursing Office	
☒ Colorado State Office	State
	☐

After the sub search screen comes up, choose the most appropriate way to search by using the drop-down menus or typing the Office Name into the Office Name field and Clicking Submit.

Office Search	
Submit	Cancel
Office Name:	
Office Type:	All
State:	CO

If multiple offices need to be added, choosing the State only will allow you to choose all offices that need to be added by Clicking on the box next to each office name to check it then Clicking Submit.

Office Search

Office Name:
 Office Type:
 State:

Office List

Office	Office Type	State
☒ Colorado State Office	State	CO
☒ Alamosa Field Office	Field	CO
☐ COFFEE Field Office	Field	CO
☐ Cortez Field Office	Field	CO
☐ Craig Field Office	Field	CO
☐ Delta Field Office	Field	CO
☐ Las Animas Field Office	Field	CO
☒ Wray Field Office	Field	CO

Once you have added the Offices, Click on the Radio button next to the office that will be disbursing your grant funds then Click Save.

Grant

Grant Grant Funds **Offices** Reviews Lots Houses Problems Metrics Comments

Grant Name: Eureka 03/2021 - 03/2023 **Grantee Name:** Test Entity
Status: Current Grant **State:** CO
Start Date: 03/31/2021 **End Date:** 03/30/2023

Servicing Office

Rural Development Servicing Office  Office Type 523 Disbursing Office

☒ Colorado State Office State ☒ 
☒ Alamosa Field Office Field ☐

Reviews Tab

The Reviews Tab is used for USDA RD and the T&MA Contractors to enter Reviews and Review Comments for the Grantees.

Grant

Grant Grant Funds Offices **Reviews** Lots Houses Problems Metrics Comments

Save Cancel

Grant Name: Eureka 03/2021 - 03/2023
Status: Current Grant
Start Date: 03/31/2021

Grantee Name: Test Entity
State: CO
End Date: 03/30/2023

Review

Review Type	Reviewer	Review Period *	Review Date *	High Risk	Agreement Date	Risk End Date
X				☐		

Add

Lots Tab

The Lots Tab is used to keep track of all Lots available to Borrowers in the grant. Each lot that will be available to Borrowers for the grant will need to be entered into the system. The lots can be entered by Clicking on the Add button. On the Lot sub screen, you will only enter information into the Lot section and the Lot Location section.

Important Note: The Borrower section is auto filled after the lot is connected through the Borrower File. The Borrower section in the Grant File is for viewing only and is locked to changes to ensure data integrity.

Grant

Grant Grant Funds Offices Reviews **Lots** Houses Problems Metrics Comments

Grant Name: Eureka 03/2021 - 03/2023
Status: Current Grant
Start Date: 03/31/2021

Grantee Name: Test Entity
State: CO
End Date: 03/30/2023

Lots

Borrower Name	Group	Lot Status	Lot No	Address	Description
Add					

Enter the following information into the Lot & Lot Location Section. Once all data is entered Click Save.

Grant

Grant Grant Funds Offices Reviews **Lots** Houses Problems Metrics Comments

Grant Name: Eureka 03/2021 - 03/2023
Status: Current Grant
Start Date: 03/31/2021

Grantee Name: Test Entity
State: CO
End Date: 03/30/2023

Save Cancel

Borrower

Borrower Name:
Standing:

RD Borrower Id:
Group:

Lot

Lot Number: *
Lot Parcel Number:
Sale Price:
Water: *
Sold Lot: ☐ Yes ☒ No
Acquisition Cost:

Lot Description:
Lot Size: ☐ Acres ☒ Square Feet
Development Fees:
Sewer: *
Lot Acquired by 2nd Borrower: ☐ Yes ☒ No
Lot Status: *

Lot Location

Address Line 1:
City:
State:
Zip Code:
County:

Address Line 2:
Congressional District:

Lot Section Fields	Description
Lot Number	Designated number that the Grantee uses to describe a lot.
Lot Description	Legal Description of the lot. Ex. Lot 9, Block 58, Lake Manor Section.
Lot Parcel Number	County Tax Property ID for the Parcel (if available).
Lot Size	Acres or Square Footage of the property. Click appropriate radio button for Acres or Square Feet.
Sale Price	Total price the Borrower will be charged.
Development Fees	Total fees the Grantee or developer is charging for the lot.
Water	Type of water source available to the property. Click on drop-down box to choose from: Public Corporation, Private Corporation, Homeowner (Septic Fields), and Community Owned.
Sewer	Type of sewer source available to the property. Click on drop-down box to choose from: Public Corporation, Private Corporation, Homeowner (Septic Fields), and Community Owned.
Sold Lot	Was the lot sold by the grantee to the borrower? Click on Radio Button and choose appropriate choice of Yes or No
Lot Acquired by 2nd Borrower	Was the lot let go and given to another Borrower? Choose the appropriate Radio Button of Yes or No.
Acquisition Cost	Cost for the Grantee to acquire the lot.
Lot Status	Status of the lot. Click on the Drop-down and choose from: Available, Borrower Owned, Purchased, or Option to Purchase.

Lot Location Fields	Description
Address Line 1	Legal street address.
Address Line 2	Legal unit or additional street address information.
City	City where the lot is located.
State	State where the lot is located.
Zip Code + 4	Zip Code plus the four additional delivery route numbers for the Zip Code for the lot. (the + 4 is optional information)
County	County where the lot is located. Click on the drop-down box for the county only after the State is chosen.
Congressional District	Choose the correct congressional district from the drop-down box based on the address. The congressional districts can be found at: https://www.house.gov/representatives/find-your-representative

Grant

Grant Grant Funds Offices Reviews **Lots** Houses Problems Metrics Comments

Grant Name: Eureka 03/2021 - 03/2023
Status: Current Grant
Start Date: 03/31/2021

Grantee Name: Test Entity
State: CO
End Date: 03/30/2023

Save Cancel

Borrower

Borrower Name:
Standing:

RD Borrower Id:
Group:

Lot

Lot Number: *
Lot Parcel Number:
Sale Price:
Water: *
Sold Lot: ☐ Yes ☒ No
Acquisition Cost:

Lot Description:
Lot Size: ☐ Acres ☒ Square Feet
Development Fees:
Sewer: *
Lot Acquired by 2nd Borrower: ☐ Yes ☒ No
Lot Status: *

Lot Location

Address Line 1:
City:
State:
Zip Code:
County:

Address Line 2:
Congressional District:

To Delete a Lot Click on the X next to the Borrower's Name that you want to Delete the Lot for.

Important Note: The Lot should only be deleted if it is not attached to a specific borrower, or you have followed the directions for disassociating a lot from a borrower.

Houses Tab

The Houses Tab in the Grant Module (File) can be used to delete a house or to view the information on the house.

Grant

Grant Grant Funds Offices Reviews Lots **Houses** Problems Metrics Comments

Grant Name: Eureka 03/2021 - 03/2023 Grantee Name: Test Entity
 Status: Current Grant State: CO
 Start Date: 03/31/2021 End Date: 03/30/2023

Houses

Borrower Name	Group	Construction Type	Living Space	Address	County
X Yoda, Grogu	Galaxy 3	With Slab	1400	1580 Spock Lane, Alamosa, CO	Alamosa

To view the House information, Click on the Borrower's Name to open the House Sub screen. Once in the House Sub screen you will be able to view all House information for that Borrower. To exit the House Information Sub screen, Click Cancel to return to the Houses Tab main screen.

Grant

Grant Grant Funds Offices Reviews Lots **Houses** Problems Metrics Comments

Grant Name: Eureka 03/2021 - 03/2023 Grantee Name: Test Entity
 Status: Current Grant State: CO
 Start Date: 03/31/2021 End Date: 03/30/2023

Save Cancel

Borrower

Borrower Name: * Yoda, Grogu RD Borrower Id: * 55123
 Standing: New/Current Group: Galaxy 3
 Lot Number: * 16 - 1580 Spock Lane, Alamosa, CO

House

Construction Style: * With Slab Construction Design Type: Ranch-EG7
 Method Type: Stick Garage Type: Two Car
 Living Area: 1400 Number of Bedrooms: 3
 Number of Bathrooms: 2 Appraised Value: \$260,000.00
 Total Funds: \$200,000.00 Total Equity: \$60,000.00
 Borrower Equity: \$60,000.00 Insurance: \$600.00
 Property Tax: \$1,000.00

Problems Tab

The Problems Tab will allow you to keep a record of TA Staff turnover, RD Staff turnover, Bad weather, Loan processing delays, Site acquisition and development, Unavailable loan/grant funds, Lack of participants, Communication between RD/Grantee, Other Problems or Comments and any positive comments that should be kept track of during the life of a grant. Comments entered can be shown on the SHARES Report by ensuring the matching Report Cycle and Dates are chosen.

To ADD a Comment, Click on the Problem Magnifying Glass.

Grant

Grant Grant Funds Offices Reviews Lots Houses **Problems** Metrics Comments

Save Cancel

Grant Name: Eureka 03/2021 - 03/2023 Grantee Name: Test Entity
 Status: Current Grant State: CO
 Start Date: 03/31/2021 End Date: 03/30/2023

Problems

Problem	Report Cycle *	Start Date *	End Date *	Detailed Explanation
---------	----------------	--------------	------------	----------------------

Choose the Comments that need to be added by clicking on the check mark next to each problem you would like to add then Click Submit.

Grant Problem List

Submit Cancel

Problem

- ☐ TA Staff turnover
- ☐ RD Staff turnover
- ☐ Bad weather
- ☐ Loan processing delays
- ☒ Site acquisition and development
- ☐ Unavailable loan/grant funds
- ☒ Lack of participants
- ☐ Communication between RD/Grantee
- ☒ Other Problems or Comments

Important Note: To ensure that the comments show up in the SHARES Report that you are running, the Report Cycle and Start & End Dates need to match the report that is being run. For example: to run a SHARES Report for a Quarterly Review Meeting ensure that all Report Cycles are set to Quarterly, the Start Date is set to the first day of the quarter and the End Date is set to the last day of the quarter. It is strongly recommended that all Problems are included in the final SHARES Report for a grant close out.

Once the Problem has been chosen, Report Cycle has been chosen, Start Date entered and End Date entered, the Detailed Explanation should be entered and include all details of the issues or comments.

Grant

Grant Grant Funds Offices Reviews Lots Houses **Problems** Metrics Comments

Save Cancel

Grant Name: Eureka 03/2021 - 03/2023
Status: Current Grant
Start Date: 03/31/2021

Grantee Name: Test Entity
State: CO
End Date: 03/30/2023

Problems

Problem	Report Cycle *	Start Date *	End Date *	Detailed Explanation
☒ Other Problems or Comments	Quarterly	03/01/2021	06/30/2021	The training session that RCAC and RD provided went very well and has increased applicants with new
☒ Bad weather	Quarterly	04/01/2021	06/30/2021	An unexpected spring snow storm closed the job site for two weeks and caused numerous delays.
☒ Lack of participants	Grant to Dai	03/01/2021	09/29/2021	We haven't been receiving very many applicants for the program. Marketing has been increased with little change.
☒ Site acquisition and development	Annual	04/01/2021	06/30/2021	We are having issues securing land for the next group. The land that was found previously is not going to

Metrics Tab

The Metrics Tab displays current metrics for both Performance and Borrowers and does not require any entries.

Grant

Grant Grant Funds Offices Reviews Lots Houses Problems **Metrics** Comments

Grant Name: Eureka 03/2021 - 03/2023
Status: Current Grant
Start Date: 03/31/2021

Grantee Name: Test Entity
State: CO
End Date: 03/30/2023

☒ Performance Metrics
 ☐ Borrower Metrics

Cost Per Approved Unit

Total Grant Funds Approved:	\$768,000.00	Proposed Number of Houses:	24
Approved Cost Per Unit:	\$32,000.00		

Actual Cost Per Unit - Original Grant Period

Total 523 Funds Used:	\$48,400.00	Total Funds Used:	\$52,400.00
Equivalent Unit:	0.2		
Cost Per Unit (523 Funds Only):	\$242,000.00	Cost Per Unit (Total Funds):	\$262,000.00

Actual Cost Per Unit - With Grant Extension Period

Total 523 Funds Used:	\$48,400.00	Total Funds Used:	\$52,400.00
Equivalent Unit:	0.2		
Cost Per Unit (523 Funds Only):	\$242,000.00	Cost Per Unit (Total Funds):	\$262,000.00

Grant

Grant Grant Funds Offices Reviews Lots Houses Problems **Metrics** Comments

Grant Name: Eureka 03/2021 - 03/2023
Status: Current Grant
Start Date: 03/31/2021

Grantee Name: Test Entity
State: CO
End Date: 03/30/2023

☒ Performance Metrics ☐ Borrower Metrics

Cost Per Approved Unit

Total Grant Funds Approved:	\$768,000.00	Proposed Number of Houses:	24
Approved Cost Per Unit:	\$32,000.00		

Actual Cost Per Unit - Original Grant Period

Total 523 Funds Used:	\$48,400.00	Total Funds Used:	\$52,400.00
Equivalent Unit:	0.2	Cost Per Unit (Total Funds):	\$262,000.00
Cost Per Unit (523 Funds Only):	\$242,000.00		

Actual Cost Per Unit - With Grant Extension Period

Total 523 Funds Used:	\$48,400.00	Total Funds Used:	\$52,400.00
Equivalent Unit:	0.2	Cost Per Unit (Total Funds):	\$262,000.00
Cost Per Unit (523 Funds Only):	\$242,000.00		

Comments Tab

The Comments Tab will allow you to keep a record of any comments you would like to keep track of that are directly related to the Borrower. These comments are not shown on any reports but are for your own record keeping.

- To enter a comment, Click on the Calendar Icon and choose the correct date for the first entry.
- Enter any comments in the Comment field then Click Save.
- The Entered By and Organization fields will be automatically filled in after the comment is saved.
- To add additional entries, Click on the Add button and follow the same directions.
- To Delete a comment, Click on the X next to the comment you would like to delete.

Grant

Grant Grant Funds Offices Reviews Lots Houses Problems Metrics **Comments**

Data successfully saved.

Grant Name: Eureka 03/2021 - 03/2023
Status: Current Grant
Start Date: 03/31/2021

Grantee Name: Test Entity
State: CO
End Date: 03/30/2023

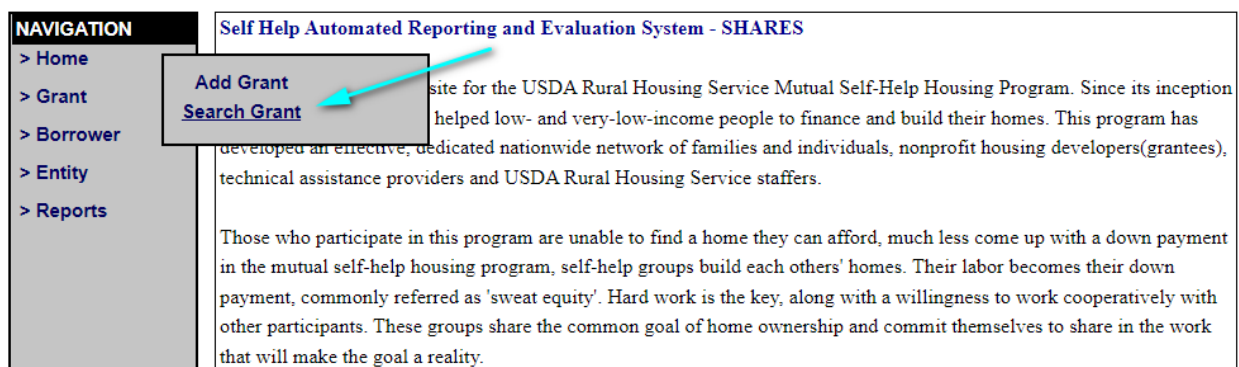
Comments

Entered By	Organization	Date *	Comment *
Angela Baker	Rural Community Assistance Cor	09/29/2021	Justine will be out on leave for two weeks. During this time Allan will be filling in from 10/01/2021-10/28/2021.

OPENING THE GRANT

To re-open the grant, hover your mouse over the Grant Module (File) in the Navigation menu.

Click on Search Grant.



Enter the Grant Name, Grantee Name, or use the drop-down boxes for the Region, State, and Status of those fields then Click Submit.

Important Note: It is best to use all lower case when entering information into search screens, only one or two fields are needed, and less information is better for searching.

ADDING EXTENSIONS, SUPPLEMENTALS AND EU CHANGES INTO THE GRANT

- Open the grant that needs to have an extension and/or supplemental added.
In the Grant Tab:
- Change the Proposed Number of Homes to the new total if an EU increase or reduction has been granted.
- Change the Proposed Grant Period to reflect the number of months between the start of the grant and the new end date.
- Change the initial Grant Amount to reflect the original grant amount plus any additional funds awarded with the extension.
- In the Grant Extension section, Click on the down arrow in the first box and choose Development.
- Enter the Extension End Date in the Extension Date field in the MM/DD/YYYY format or Click on the Calendar Icon and choose the new end date.
- Enter the supplemental dollar amount if a supplemental was awarded. If a supplemental was not included enter 0.00.
- To add an additional extension, Click on Add in the Grant Extensions section and follow the directions above.
- To delete an Extension, Click on the X next to the Extension that you would like to delete.

Before:

Grant

Grant Grant Funds Offices Reviews Lots Houses Problems Metrics Comments

Save Delete Cancel

Grant Name: * Eureka 12/2019-12/2021
 Status: * Current Grant
 Contractor: * Rural Community Assistance Corporation

Grantee Name: * Test Entity
 State: * CO
 County: Alamosa

Proposed Number of Homes: * 24
 Proposed Grant Amount: \$936,000.00
 Pre-Dev Start Date:
 Pre-Application Date:
 Grant Start Date: 12/20/2019
 Initial Grant Amount: \$936,000.00
 Number of TA Staff: 8

Pre-Development Amount:
 Proposed Grant Period: 24
 Pre-Dev End Date:
 Application Date: 11/15/2019
 Grant End Date: 12/19/2021
 Construction Supervisors: 2

Grant Extensions

Extension Type *	Extension Date *	Extension Amount *
X		

Add

After:

Grant

Grant Grant Funds Offices Reviews Lots Houses Problems Metrics Comments

Save Delete Cancel

Grant Name: * Eureka 12/2019-12/2021
 Status: * Current Grant
 Contractor: * Rural Community Assistance Corporation

Grantee Name: * Test Entity
 State: * CO
 County: Alamosa

Proposed Number of Homes: * 24
 Proposed Grant Amount: \$936,000.00
 Pre-Dev Start Date:
 Pre-Application Date:
 Grant Start Date: 12/20/2019
 Initial Grant Amount: \$1,136,000.00
 Number of TA Staff: 8

Pre-Development Amount:
 Proposed Grant Period: 36
 Pre-Dev End Date:
 Application Date: 11/15/2019
 Grant End Date: 12/19/2021
 Construction Supervisors: 2

Grant Extensions

Extension Type *	Extension Date *	Extension Amount *
X Development	12/19/2022	\$200,000.00

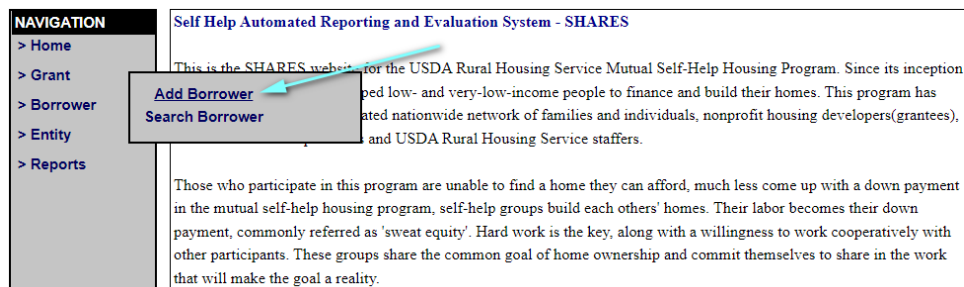
Add

CHAPTER 6 – THE BORROWER MODULE (FILE)

ADDING A NEW BORROWER

Hover mouse over Borrower Module (File).

Click on Add Borrower.



Borrowers Tab

Begin entering all relevant information into the Borrower Tab.

- After entering the Last Name, First Name and Middle Name, Click the drop-down and choose New/Current to add a new Borrower.
- The RD Borrower ID can be entered later once the Letter of Eligibility is received.
- Next, enter a Group Name for the group that the Borrower will be in.
- To enter the Grant Name, Click on the Magnifying Glass Icon next to the Grant Name field.
- Complete the remaining fields in the Borrower and Borrower Background sections.

Important Note - When entering a Group name, be sure to use a unique name for your Group, such as Galaxy 3. Avoid using generic group names such as Group 1 or Group One. Using unique names will eliminate any data overlap issues in the future.

Borrower Section Fields	Description
Last Name	Last Name of the Primary Borrower
First Name	First Name of the Primary Borrower
Middle Name	Middle Name of the Primary Borrower
Standing	Current Standing of Primary Borrower: New/Current, Assumed Existing Loan, Released from Property, Property Foreclosed
RD Borrower ID	Borrower's loan account number from Rural Development (can be

Borrower Section Fields	Description
	found on Eligibility Letter)
Group	Group Name (unique name)
Grant Name	Name of grant in system

Borrower Background Fields	Description
Date of Birth	Primary Borrower's date of birth
Primary Funding Source	Source of all funding for home construction
Gender	Gender of primary Borrower
Income Level	Primary Borrower's income level (low- or very low-income) as determined by annual adjusted income
Ethnicity	Ethnicity of primary borrower
Marital Status	Marital status of the borrower
Occupation	Occupation of the borrower
Annual Income	Annual Income calculated by using the 4A Calculation Worksheet
Annual Adjusted Income	Annual Adjusted Income calculated by using the 4A Calculation Worksheet
Dependents	Number of dependents the Borrower has
Household Size	The number of people who will be living in the household once the home is built
Type of Dwelling	The type of dwelling (Rental, Manufactures/Mobile, Living with Family or Homeless) in which the Borrower is currently living
Disabled	The disabled status of the Borrower
Extended Family	Is extended family living with the Borrower?
Deficient Housing	Is the Borrower living in deficient housing?
RD Area Loan Limit	RD Area Loan Limit during the time of the application
Energy Efficiency Required	Is energy efficiency required?
Loan Amount	The total loan amount for which the Borrower is approved.

Co-Borrowers Fields	Description
Co-Borrower Last Name	Last name of the Co-Borrower
Co-Borrower First Name	First name of the Co-Borrower
Co-Borrower Middle Name	Middle name of the Co-Borrower

Co-Signer Fields	Description
Co-Signer Last Name	Last name of the Co-Signer
Co-Signer First Name	First name of the Co-Signer
Co-Signer Middle Name	Middle name of the Co-Signer

Dates Tab

Some dates in the Dates Tab are pulled into other Tabs, so it's important to make sure that you know where those are pulled. Date fields are not required, but it is important to ensure you have entered the Initial Contact Date to move forward. The date fields that are shown in blue in the table below auto populate some dates in the Construction Tab.

Borrower

Borrower

Dates

Borrower Funds

Lot

House

Construction

Grant

Comments

Save

Cancel

Last Name:

Yoda

First Name:

Grogu

Standing:

New/Current

RD Borrower Id:

55123

Group:

Galaxy 3

Grant Name:

Eureka 03/2021 - 03/2023

Milestone Dates

Initial Contact Date:

04/01/2021

Application Received Date:

04/01/2021

Package Submitted to RD Date:

Date of Pre-Qualification:

Application Completed Date:

04/30/2021

Eligibility Determined Date:

05/14/2021

Approved Date:

05/14/2021

Loan Closed Date:

05/29/2021

Preconstruction Conference Date:

Construction Docket Submitted Date:

05/28/2021

Date Under Construction:

06/03/2021

Final Inspection Date:

Application Withdrawn Date:

Application Rejection Date:

Milestone Dates	Date Description
Initial Contact	Original contact with potential applicant.
Application Received	Pre-qualification application. This is the minimum info needed to determine if they are within income and debt ranges and will determine if you continue with the applicant.
Package Submitted to RD Date	The date the full pre-qualification application is submitted to RD.
Date of Pre-Qualification	The date RD pre-qualified the applicant.
Application Completed Date	Date the full loan application was completed and sent to RD. (Date auto-populates the Pre-Construction Phase I Actual Start date in the Construction Tab).
Eligibility Determined	Date RD issues the Letter of Eligibility. (Date can be found on the letter.) (Date auto-populates the Pre-Construction Phase I Actual End date in the Construction Tab).
Approved Date	Date appraisal packet was submitted to RD. (Date auto populates the Pre-Construction Phase II Actual Start date in the Construction Tab).
Loan Closed Date	Date the mortgage and deed are put into the Borrower's Name and recorded. (Date auto-populates the Pre-Construction Phase II Actual End date in the Construction Tab).
Preconstruction Conference Date	Date that the initial Pre-Construction Conference was held with all families (borrowers and their families) in the group.
Construction Docket Submitted Date	Date that RD submits the construction docket.
Date Under Construction	Automatically populates from the Start Date entered in the first task in the Construction section of the Construction Tab.
Final Inspection date	Date that construction ended for the entire group.
Application Withdrawn Date	Date that the borrower is withdrawn from the program.
Application Rejection Date	Date that the borrower receives an Application Rejected letter.

Borrower Funds Tab

All funds that are being used for the purpose of the home are entered into the Borrower Funds Tab. All loans, grants and down payment assistance funds used in total for the complete building budget must be entered separately into this section.

- To enter the funds, Click on the drop-down for Fund Type and choose the appropriate Type (see choices in tables below).
- Click on the drop-down for Source and choose the appropriate source (see choices in tables below).
- Type the Lender/Funder name into the Lender field
- Enter the date using MM/DD/YYYY format or Click on the Calendar Icon to choose the loan closing date.
- Enter the amount in the Amount Field of each individual Fund Type.
- To Add an additional line, Click the Add Button and follow the steps above.
- To Delete a line, Click the X next to the line you would like to Delete.
- Once finished, Click Save to ensure that all changes are saved to the system.

Borrower

Borrower Dates **Borrower Funds** Lot House Construction Grant Comments

Save Cancel

Last Name: Yoda First Name: Grogu
 Standing: New/Current RD Borrower Id: 55123
 Group: Galaxy 3 Grant Name: Eureka 03/2021 - 03/2023

Borrower Funds

Fund Type *	Source *	Lender *	Date Closed *	Amount *
☒ RD Loan	502 Single Family Loan	USDA Rural Development	06/28/2021	\$200,000.00
☒ Grant	SHOP Funds	Tiera del Sol Enterprises	06/28/2021	\$15,000.00
Total Amount				\$215,000.00

Add

Borrower Fund Types	Field Description
RD Loan	Funds that come directly from USDA Rural Development 502 Direct Loan Funds.
Deferred Loan	Deferred loan funds from another source.
Grant	Grant funds.
Other	Any other funds that are available.

Borrower Sources	Field Description
502 Single Family Loan	USDA RD Single Family 502 Direct Loan.
State Financing	State Housing Authority or specified State Funds through other State agencies.
Private Financing	Grantee loan funds, Bank Funds, CDFI Down Payment Assistance.
Other Federal Financing	Federal Home Loan Bank AHP Funds through dispersing agencies.
Other Public Financing	Town or City Financing, Town and City or County Housing Authority Financing.
Home Funds	HUD Financing and Down Payment Assistance through dispersing agencies.
SHOP Funds	SHOP Funds.
CDBG	Community Development Block Grant Funds through dispersing agencies.
Fannie Mae	Fannie Mae through partners dependent on state.
Unknown	Any other source not listed.

Lot Tab

To assign a lot to a Borrower, Click on the Lot Number field and choose a lot number from the list that comes up.

- Click the Tab Button on your keyboard. .
- The rest of the information will auto populate from the information that was entered into the Grant Module (File).

Borrower

Borrower Dates Borrower Funds **Lot** House Construction Grant Comments

Save Cancel

Last Name: Yoda
Standing: New/Current
Group: Galaxy 3

First Name: Grogu
RD Borrower Id: 55123
Grant Name: Eureka 03/2021 - 03/2023

Lot

Lot Number: *

Lot Parcel Number:

Sale Price:

Water: *

Sold Lot: ☐ Yes ☒ No

Acquisition Cost:

Lot Description:

Lot Size: ☐ Acres ☒ Square Feet

Development Fees:

Sewer: *

Lot Acquired by 2nd Borrower: ☐ Yes ☒ No

Lot Status: *

Lot Location

Address Line 1:

City:

State:

Zip Code:

County:

Address Line 2:

Congressional District:

- Once the information has populated, Click Save.

Borrower

Borrower Dates Borrower Funds **Lot** House Construction Grant Comments

Save Cancel

Last Name: Yoda
Standing: New/Current
Group: Galaxy 3

First Name: Grogu
RD Borrower Id: 55123
Grant Name: Eureka 03/2021 - 03/2023

Lot

Lot Number: *

Lot Parcel Number:

Sale Price:

Water: *

Sold Lot: ☐ Yes ☒ No

Acquisition Cost:

Lot Description:

Lot Size: ☐ Acres ☒ Square Feet

Development Fees:

Sewer: *

Lot Acquired by 2nd Borrower: ☐ Yes ☒ No

Lot Status: *

Lot Location

Address Line 1:

City:

State:

Zip Code:

County:

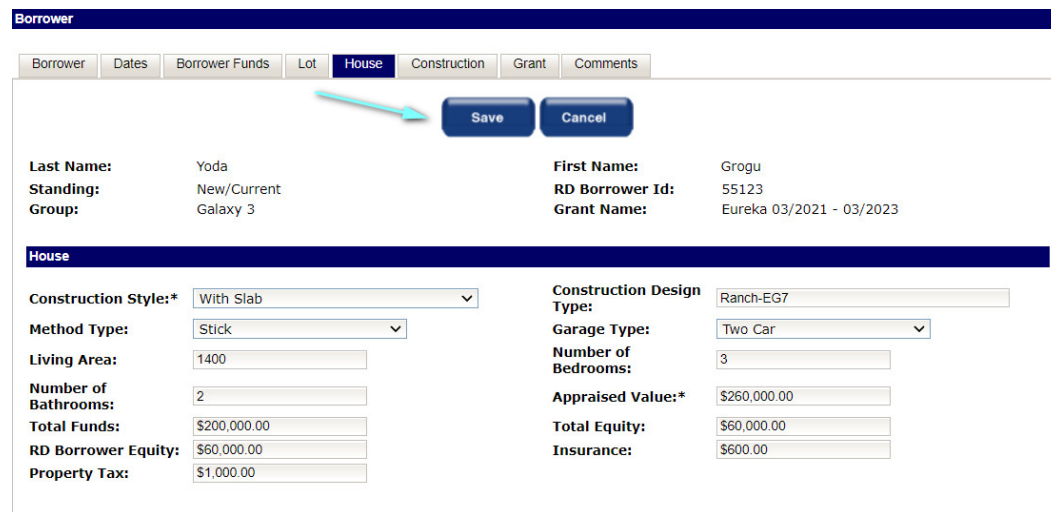
Address Line 2:

Congressional District:

House Tab

Begin entering all relevant information into the House Tab. To choose the Construction Type, Method Type or Garage Type, Click on the drop-down list and choose the appropriate choice. After all information is entered, Click on the Save Button.

Important Note – The Construction Style will determine the point breakdown in the Construction Tab for the tasks.



Borrower

Borrower | Dates | Borrower Funds | Lot | **House** | Construction | Grant | Comments

Save **Cancel**

Last Name: Yoda First Name: Grogue
 Standing: New/Current RD Borrower Id: 55123
 Group: Galaxy 3 Grant Name: Eureka 03/2021 - 03/2023

House

Construction Style*: With Slab Construction Design Type: Ranch-EG7
 Method Type: Stick Garage Type: Two Car
 Living Area: 1400 Number of Bedrooms: 3
 Number of Bathrooms: 2 Appraised Value*: \$260,000.00
 Total Funds: \$200,000.00 Total Equity: \$60,000.00
 RD Borrower Equity: \$60,000.00 Insurance: \$600.00
 Property Tax: \$1,000.00

House Fields	Field Description
Construction Style	Style of construction of the foundation of the home (with Slab, with Crawl space, with Basement, with Crawl Space for Puerto Rico Only and with Slab for Puerto Rico Only).
Construction Design Type	House plan name.
Method Type	Type of method that is used to build the home (Stick, Panel and Combination).
Garage Type	Garage type and/or style (one car, two car or carport).
Living Area	Heated square footage of the home.
Number of Bedrooms	Number of bedrooms in the home.
Number of Bathrooms	Number of bathrooms in the home.
Appraised Value	Appraised value of the home based on the appraisal.
Total Funds	Total funds used to build the home. The Total Funds field is auto populated by the funds that are entered into the Borrower Funds Tab.
Total Equity	Total Equity field is auto filled and is calculated all Borrower Funds and Appraised Value.
RD Borrower Equity	RD Borrower Equity is auto filled and is calculated and auto filled by using only USDA RD Borrower Funds and Appraised Value.
Insurance	The total cost of Homeowner's insurance.
Property Tax	The total cost of property tax on the home.

Construction Tab

The Construction Tab keeps track of the status of the tasks that are performed in both the Pre-Construction Section and the Construction Section. Each Construction Task in the Construction Section is assigned a point value based on the Construction Style of the home being built.

Pre-Construction Section

Phase I & Phase II Task Actual Start & End Dates are auto populated from the Dates Tab as shown below. Pre-Construction Points for Phase I and Phase II are:

.1 point for Eligibility Determination.

.1 point for Loan Closing.

These points will be shown as pre-construction points in the SHARES Report.

Borrower

Borrower

Dates

Borrower Funds

Lot

House

Construction

Grant

Comments

Save

Cancel

Copy

Last Name:

Wells

First Name:

Helena

Standing:

New/Current

RD Borrower Id:

54323

Group:

Galaxy 1

Grant Name:

Eureka 12/2019-12/2021

Construction Style

With Slab

Pre-Construction

Seq	Task	Actual Start	Actual End	Points
1	Phase I	11/02/2019	11/15/2019	10
2	Phase II	11/18/2019	02/06/2020	10

Borrower

Borrower

Dates

Borrower Funds

Lot

House

Construction

Grant

Comments

Save

Cancel

Last Name:

Wells

First Name:

Helena

Standing:

New/Current

RD Borrower Id:

54323

Group:

Galaxy 1

Grant Name:

Eureka 12/2019-12/2021

Milestone Dates

Initial Contact Date:	10/29/2019	Application Received Date:	10/31/2020
Package Submitted to RD Date:	10/31/2020	Date of Pre-Qualification:	10/31/2020
Application Completed Date:	11/02/2019	Eligibility Determined Date:	11/15/2019
Approved Date:	11/18/2019	Loan Closed Date:	02/06/2020
Preconstruction Conference Date:	02/06/2020	Construction Docket Submitted Date:	
Date Under Construction:	01/15/2020	Final Inspection Date:	
Application Withdrawn Date:		Application Rejection Date:	

Actual Start Dates
for Phase I & II

Actual End Dates
for Phase I & II

Construction Section

Each task is allotted points as shown in the Points Column. These points are assigned based on the Construction Style chosen for the home. The points for all tasks add to 100 points, which equals one full Equivalent Unit (EU). Construction Points pledged must equal 65% or greater as required in the RD Instruction 1944-I 1944.403 (K) and shown in detail in 1944-I Exhibit B-2.

Construction Points for Tasks 1-27 equal 100% of construction points. This counts as 80% of the total one EU.

As the Pledge check boxes are marked, the total points pledged are tallied at the bottom and shown in Points Pledged.

As Actual End dates are entered, points earned begin to calculate in the Earned column and are tallied at the bottom and shown in the Points Earned totals.

Once all the tasks are pledged, enter construction task Actual Start and Actual End dates as the tasks are started and completed. As the tasks are completed, the points will begin to accumulate in the Points Earned column.

Important Note: Only tasks that the borrowers are completing should be pledged to that borrower under the Pledge column.

Grant Tab

The Grant Tab is a view-only screen in the Borrower Module (File). Changes cannot be made to this screen while in the Borrower Module (File).

Borrower							
Borrower	Dates	Borrower Funds	Lot	House	Construction	Grant	Comments
Last Name:	Calvert	First Name:	Rosalee				
Standing:	New/Current	RD Borrower Id:	54333				
Group:	Galaxy 2	Grant Name:	Eureka 12/2019-12/2021				
Grant							
Grant Name:	Eureka 12/2019-12/2021			Grantee Name:	Test Entity		
Status:	Current Grant			State:	CO		
Contractor:	Rural Community Assistance Corporation			County:	Alamosa		
Proposed Number of Homes:	24			Pre-Development Amount:			
Proposed Grant Amount:	\$936,000.00			Proposed Grant Period:	36		
Pre-Dev Start Date:				Pre-Dev End Date:			
Pre-Application Date:				Application Date:	11/15/2019		
Grant Start Date:	12/20/2019			Grant End Date:	12/19/2021		
Initial Grant Amount:	\$1,136,000.00			Construction Supervisors:	2		
Number of TA Staff:	8						
Grant Extensions							
Extension Type	Extension Date		Extension Amount				
Development	12/19/2022		\$200,000.00				

Comments Tab

The Comments Tab will allow you to keep a record of any comments that are directly related to the Borrower. These comments are not shown on any reports but are for your own record keeping.

- To enter a comment, Click on the Date Icon and choose the correct date for the first entry.
- Enter any comments in the Comment field then Click Save.
- The Entered By and Organization fields will be automatically filled in after the comment is saved.
- To add additional entries, Click on the Add button and follow the same directions.
- To Delete a comment, Click on the X next to the comment you would like to delete.

Important Note: It is recommended that you keep track of any concerns or issues with the Borrowers in the Comments Tab for the entire time that the Borrower is participating in the program. These records can be used if you need to follow up with any issues or concerns that arise during the build process.

Borrower

Borrower Dates Borrower Funds Lot House Construction Grant **Comments**

Data successfully saved.

Last Name: Calvert **First Name:** Rosalee
Standing: New/Current **RD Borrower Id:** 54333
Group: Galaxy 2 **Grant Name:** Eureka 12/2019-12/2021

Comments

Entered By	Organization	Date *	Comment *
X Angela Baker	Rural Community Assistance Cor	06/01/2021	Called Rosalee to talk about her weekly hours that have been short for several weeks. Rosalee stated that she had some
X Angela Baker	Rural Community Assistance Cor	07/13/2021	Rosalee called and stated that there was an incident involving Joe at the job site. She stated that Joe was throwing tools at

Add

OPENING THE BORROWER

- To re-open the grant, hover your mouse over the Borrower Module (File)
- Click on Search Borrower

Borrower Search

Submit Cancel

RD Borrower Id:

Borrower Last Name: Borrower First Name:

Borrower Group: Grant Name:

Grantee Name: Region:

State:

- Enter the RD Borrower Id, Borrower Last Name, Borrower First Name, Borrower Group, Group Name, Grantee Name, or use the drop-down boxes for the Region or Status then Click Submit.

Important Note: It is best to use all lower case when entering information into search screens, only one or two fields are needed, and less information is better for searching.

PLEDGING POINTS TO GROUP

Pledged points can be copied to an entire group if all Borrowers in the group have the same Construction Style.

- To Pledge points to the entire group, ensure that all pledged points are checked in the Pledge column of the Construction section on the Construction Tab of one of the Borrowers.

Borrower

Borrower Dates Borrower Funds Lot House **Construction** Grant Comments

Save Cancel Copy

Last Name: Kirk First Name: James
 Standing: New/Current RD Borrower Id: 54324
 Group: Galaxy 1 Grant Name: Eureka 12/2019-12/2021
 Construction Style With Slab

Pre-Construction

Seq	Task	Actual Start	Actual End	Points
1	Phase I	11/03/2019	11/13/2019	10
2	Phase II	11/14/2019	01/08/2020	10

Construction

Seq	Task	Actual Start	Actual End	Points	Pledge	Points Pledged	Earned	Pledge to Group
1	Excavation	01/15/2020	01/22/2020	3	☒			☐
2	Footing, Foundations, columns	01/28/2020	02/04/2020	8	☒			☐
3	Floor slab or framing	02/15/2020	02/30/2020	6	☒			☐
4	Subflooring			0	☐			☐
5	Wall framing sheathing			7	☐			☐
6	Roof and ceiling framing, sheathing			6	☐			☐
7	Roofing			5	☐			☐
EU 0.26		Total Points		100	Points Pledged	11	Points Earned	8

- Click on the check boxes in the Pledge to Group column that corresponds to check boxes in the

Pledge Column.

- Click Save.
- Click Copy.

Borrower

Borrower Dates Borrower Funds Lot House **Construction** Grant Comments

Save Cancel Copy

Last Name: Kirk
Standing: New/Current
Group: Galaxy 1

First Name: James
RD Borrower Id: 54324
Grant Name: Eureka 12/2019-12/2021

Construction Style With Slab

Pre-Construction

Seq	Task	Actual Start	Actual End	Points
1	Phase I	11/03/2019	11/13/2019	10
2	Phase II	11/14/2019	01/08/2020	10

Construction

Seq	Task	Actual Start	Actual End	Points	Pledge	Points Pledged	Earned	Pledge to Group
1	Excavation	01/15/2020	01/22/2020	3	☒			☒
2	Footing, Foundations, columns	01/28/2020	02/04/2020	8	☒			☒
3	Floor slab or framing	02/15/2020	02/30/2020	6	☒			☒
4	Subflooring			0	☐			☐
5	Wall framing sheathing			7	☐			☐
6	Roof and ceiling framing, sheathing			6	☐			☐
7	Roofing			5	☐			☐
Total Points				100	Points Pledged	11	Points Earned	8

EU 0.26

Borrower

Borrower Dates Borrower Funds Lot House **Construction** Grant Comments

Save Cancel Copy

Last Name: Wells
Standing: New/Current
Group: Galaxy 1

First Name: Helena
RD Borrower Id: 54323
Grant Name: Eureka 12/2019-12/2021

Construction Style With Slab

Pre-Construction

Seq	Task	Actual Start	Actual End	Points
1	Phase I	11/02/2019	11/15/2019	10
2	Phase II	11/18/2019	02/06/2020	10

Construction

Seq	Task	Actual Start	Actual End	Points	Pledge	Points Pledged	Earned	Pledge to Group
1	Excavation	11/10/2020	01/10/2020	3	☐			☐
2	Footing, Foundations, columns	01/15/2020	01/22/2020	8	☒	8	8	☐
3	Floor slab or framing	01/25/2020	02/08/2020	6	☒	6	6	☐
4	Subflooring			0	☒	0		☐
5	Wall framing sheathing			7	☒	7		☐
6	Roof and ceiling framing, sheathing			6	☒	6		☐
7	Roofing			5	☐			☐
Total Points				100	Points Pledged	74	Points Earned	17

EU 0.34

CHAPTER 7 – REMOVING BORROWERS FROM A GROUP OR A GRANT

- Open the Borrower's File by following the directions for OPENING THE BORROWER in the previous Chapter.
- On the Borrower Tab, Delete the Group information in the Group field to remove from a group or Click on the Magnifying Glass to change which grant the Borrower is associated with.
- Click Save.

Borrower

Borrower Dates Borrower Funds Lot House Construction Grant Comments

Save Delete Cancel

Last Name: * Wells First Name: * Helena Middle Name: G
 Standing: * New/Current RD Borrower Id: 54323
 Group: Galaxy 1 Grant Name: * Eureka 12/2019-12/2021

Background

Date of Birth: 03/12/1983 Primary Funding Source: * 502
 Gender: Female Income Level: * Very Low Income
 Ethnicity: Caucasian Marital Status: Unmarried
 Occupation: Dental Assistant Annual Income: \$25,200.00
 Annual Adjusted Income: \$23,500.00 Dependents: 1
 Household Size: * 2 Type of Dwelling: Living With Family
 Disabled: Extended Family: ☐ Yes ☒ No
 Deficient Housing: ☐ Yes ☒ No RD Area Loan Limit: \$210,000.00
 Energy Efficiency Required: ☐ Yes ☒ No Loan Amount: \$170,000.00

CHAPTER 8 – DELETING A BORROWER AND/OR REASSOCIATING A LOT AND/OR HOUSE TO ANOTHER BORROWER

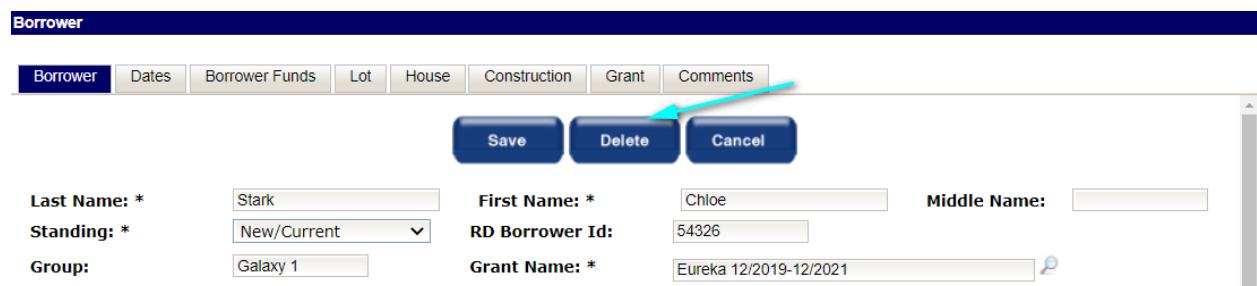
The purpose of this chapter is to help make corrections or changes to a borrower's file and the associated lot and/or house. Reasons for changes could include any of the following: the borrower is leaving the program, the lot needs to be re-associated to another borrower, or a borrower has been duplicated in the Grant Construction Report. Please read through the entire Chapter before making any changes to the Borrower's File in SHARES.

Important Note: Do not delete borrowers from SHARES unless the Borrower is showing up in the system multiple times or showing up multiple times in the Grant Construction Report. If you need to remove them from a grant or a group, follow the directions listed in Chapter 7.

Important Note: If a borrower withdraws from the program and a new borrower is taking the lot and/or house, follow these same steps without deleting the borrower's file. You can then associate the lot and/or the house to the new borrower.

DELETING A BORROWER WITH NO OTHER INFORMATION BESIDES THE BORROWER TAB

If there is only information entered into the Borrower Tab, Click Delete.



The screenshot shows the 'Borrower' tab selected in the SHARES system. The 'Delete' button is highlighted with a red arrow. The form contains the following fields:

Borrower							
Borrower	Dates	Borrower Funds	Lot	House	Construction	Grant	Comments
Save Delete Cancel							
Last Name: *	Stark		First Name: *	Chloe		Middle Name:	
Standing: *	New/Current		RD Borrower Id:	54326			
Group:	Galaxy 1		Grant Name: *	Eureka 12/2019-12/2021			

Click OK to finalize the deletion.

Borrower

Borrower | Dates | Borrower Funds | Lot | House | Construction | Grant | Comments

Save | Delete | Cancel

Last Name: * Stark | First Name: * Chloe | Middle Name: |
 Standing: * New/Current | RD Borrower Id: 54326 |
 Group: Galaxy 1 | Date of Birth: 02/20/2021 |
 Gender: Female | Ethnicity: Caucasian | Marital Status: Separated |
 Occupation: Data Entry Specialist | Annual Income: \$33,400.00 |
 Annual Adjusted: \$31,300.00 | Dependents: 3

Are you sure you want to delete this Borrower?
 OK | Cancel

Important Note: Follow the directions for disassociating a borrower from their lot and/or house in this order to ensure data integrity and to avoid data errors and/or multiple listing entries.

DISASSOCIATING A BORROWER FROM A LOT AND/OR HOUSE

Important Note: If a new borrower is taking over the lot and/or house after construction has started, take screen prints, or take down the information from the House Tab and from the Construction Tab to re-enter into the new Borrower's File.

To start:

- Open the Borrower File.
- Click on the Construction Tab.
- Remove any dates that are entered into the Construction section of the Construction Tab; then Click Save.

Borrower

Borrower Dates Borrower Funds Lot House **Construction** Grant Comments

Save Cancel Copy

Last Name: Stark First Name: Chloe
 Standing: New/Current RD Borrower Id: 54326
 Group: Galaxy 1 Grant Name: Eureka 12/2019-12/2021
 Construction Style With Slab

Pre-Construction

Seq	Task	Actual Start	Actual End	Points
1	Phase I	11/08/2019	11/27/2019	10
2	Phase II	11/28/2019	01/09/2020	10

Construction

Seq	Task	Actual Start	Actual End	Points	Pledge	Points Pledged	Earned	Pledge to Group
1	Excavation	01/15/2020	01/19/2020	3	☐			☐
2	Footing, Foundations, columns			8	☐			☐
3	Floor slab or framing			6	☐			☐
4	Subflooring			0	☐			☐
5	Wall framing sheathing			7	☐			☐
6	Roof and ceiling framing, sheathing			6	☐			☐
7	Roofing			5	☐			☐

EU 0.22 Total Points 100 Points Pledged 0 Points Earned 3

- If there is information entered into the Dates and Borrower Funds Tabs, Click on the Dates Tab and Add an Application Withdrawn Date or Application Rejection Date.
- Click Save.

Borrower

Borrower **Dates** Borrower Funds Lot House Construction Grant Comments

Save Cancel

Last Name: Stark First Name: Chloe
 Standing: New/Current RD Borrower Id: 54326
 Group: Galaxy 1 Grant Name: Eureka 12/2019-12/2021

Milestone Dates

Initial Contact Date: 10/23/2019	Application Received Date:
Package Submitted to RD Date:	Date of Pre-Qualification:
Application Completed Date: 11/08/2019	Eligibility Determined Date: 11/27/2019
Approved Date: 11/28/2019	Loan Closed Date: 01/09/2020
Preconstruction Conference Date:	Construction Docket Submitted Date:
Date Under Construction: 01/20/2020	Final Inspection Date:
Application Withdrawn Date: 01/28/2020	Application Rejection Date:

- Then Click on Borrower Funds Tab and Click the X next to each Borrower Fund to Delete the funds.

Borrower

Borrower Dates **Borrower Funds** Lot House Construction Grant Comments

Save Cancel

Last Name: Stark First Name: Chloe
 Standing: New/Current RD Borrower Id: 54326
 Group: Galaxy 1 Grant Name: Eureka 12/2019-12/2021

Borrower Funds

Fund Type *	Source *	Lender *	Date Closed *	Amount *
X RD Loan	502 Single Family Loan	USDA RD	01/09/2020	\$178,300.00
Total Amount				\$178,300.00

Add

- Open the Grant File.
- Click on the Houses Tab.
- Click the X next to the House you would like to Delete.
- Click on OK to confirm deletion of the House.

Grant

Grant Grant Funds Offices Reviews Lots **Houses** Problems Metrics Comments

Grant Name: Eureka 12/2019-12/2021 Grantee Name: Test Entity
 Status: Current Grant State: CO
 Start Date: 12/20/2019 End Date: 12/19/2021

Houses

Borrower Name	Group	Construction Type	Living Space	Address	County
X Carter, Jack	Galaxy 1	With Slab	1400	185 Nebula Ave, Alamosa, CO	Alamosa
X Kirk, James . T	Galaxy 1	With Slab	1600	123 Mars Drive, Alamosa, CO	Alamosa
X Spock, John	Galaxy 1	With Slab	1500	183 Nebula Ave, Alamosa, CO	Alamosa
X Stark, Chloe	Galaxy 1	With Slab	1400	188 Nebula Ave, Alamosa, CO	Alamosa
X Wells, Helena. G	Galaxy 1	With Slab	1600	125 Fire Fly Lane, Alamosa, CO	Alamosa
X Wolverine, Hugh	Galaxy 1	With Slab	1500	157 Stargate Drive, Alamosa, CO	Alamosa
X Calvert, Rosalee	Galaxy 2	With Slab	1700	145 Fire Fly Lane, Alamosa, CO	Alamosa
X OBrien, Maggie	Galaxy 2	With Slab	1600	129 Fire Fly Lane, Alamosa, CO	Alamosa
X Steno, Jill	Galaxy 2	With Slab	1500	125 Mars Drive, Alamosa, CO	Alamosa

Grant

Grant Grant Funds Offices Reviews Lots **Houses** Problems Metrics Comments

Grant Name: Eureka 12/2019-12/2021 **Grantee Name:** Test Entity
Status: Current Grant **State:** CO
Start Date: 12/20/2019 **End Date:** 12/19/2021

Houses

Borrower Name	Address	County
X Carter, Jack	185 Nebula Ave, Alamosa, CO	Alamosa
X Kirk, James, T	123 Mars Drive, Alamosa, CO	Alamosa
X Spock, John	183 Nebula Ave, Alamosa, CO	Alamosa
X Stark, Chloe	188 Nebula Ave, Alamosa, CO	Alamosa
X Wells, Helena, G	125 Fire Fly Lane, Alamosa, CO	Alamosa
X Wolverine, Hugh	157 Stargate Drive, Alamosa, CO	Alamosa
X Calvert, Rosalee	145 Fire Fly Lane, Alamosa, CO	Alamosa
X OBrien, Maggie	129 Fire Fly Lane, Alamosa, CO	Alamosa
X Steno, Jill	125 Mars Drive, Alamosa, CO	Alamosa

Grant

Are you sure you want to delete this house from the grant?

OK Cancel

- Open the Borrower File
- Click on the Lot Tab of the Borrower File.
- Click on the X next to the Lot Number Field to disassociate the lot from the borrower.

Borrower

Borrower Dates Borrower Funds **Lot** House Construction Grant Comments

Last Name: Stark **First Name:** Chloe
Standing: New/Current **RD Borrower Id:** 54326
Group: Galaxy 1 **Grant Name:** Eureka 12/2019-12/2021

Lot

Lot Number: * 1507 **X** **Lot Description:** Legal - like Lot & Block #'s
Lot Parcel Number: **Lot Size:** 910 ☐ Acres ☒ Square Feet
Sale Price: \$48,000.00 **Development Fees:** \$1,800.00
Water: * Public Corp. **Sewer: *** Public Corp.
Sold Lot: ☐ Yes ☒ No **Lot Acquired by 2nd Borrower:** ☐ Yes ☒ No
Acquisition Cost: \$39,000.00 **Lot Status: *** Option to Purchase

Lot Location

Address Line 1: 188 Nebula Ave **Address Line 2:**
City: Alamosa
State: CO
Zip Code: 81101
County: Alamosa **Congressional District:**

- Click on OK to confirm disassociation of the lot.

Borrower

Borrower Dates Borrower Funds **Lot** House Construction Grant Comments

Save Cancel

Last Name: Stark First Name: Chloe
 Standing: New/Current RD Borrower Id: 54326
 Group: Galaxy 1 Grant Name: Eureka 12/2019-12/2021

Lot

Are you sure you want to disassociate the lot from this Borrower?
 OK Cancel

Lot Number: * 1507
 Lot Parcel Number:
 Sale Price: \$48,000.00
 Water: * Public Corp.
 Sold Lot: ☐ Yes ☒ No
 Acquisition Cost: \$39,000.00
 Development Fees: \$1,800.00
 Sewer: * Public Corp.
 Lot Acquired by 2nd Borrower: ☐ Yes ☒ No
 Lot Status: * Option to Purchase
 Legal - like Lot & Block #'s 910 ☐ Acres ☒ Square Feet

Lot Location

Address Line 1: 188 Nebula Ave Address Line 2:
 City: Alamosa
 State: CO
 Zip Code: 81101
 County: Alamosa
 Congressional District:
 Congressional District:
 Congressional District:

- If this is a duplicate Borrower, Click on the Borrower Tab.
- Click Delete.
- Click OK to confirm deletion of the Borrower.
- Click Save.

Borrower

Borrower Dates Borrower Funds Lot House Construction Grant Comments

Save Delete Cancel

Last Name: * Stark First Name: * Chloe Middle Name:
 Standing: * New/Current
 Group: Galaxy 1 RD Borrower Id: 54326
 Grant Name: * Eureka 12/2019-12/2021

The screenshot shows the 'Borrower' form with tabs: Borrower, Dates, Borrower Funds, Lot, House, Construction, Grant, and Comments. The 'Borrower' tab is active. At the top are 'Save', 'Delete', and 'Cancel' buttons. The form fields include: Last Name: * (Stark), First Name: * (Chloe), Middle Name: (empty), Standing: * (New/Current), RD Borrower Id: (54326), Group: (Galaxy 1), Date of Birth: (02/20/1...), Gender: (Female), Ethnicity: (Caucasian), Marital Status: (Separated), Occupation: (Data Entry Specialist), Annual Income: (\$33,400.00), Annual Adjusted: (\$31,300.00), and Dependents: (3). A modal dialog box is open in the center with the text 'Are you sure you want to delete this Borrower?' and 'OK' and 'Cancel' buttons. A red arrow points to the 'OK' button.

- If this is not a duplicate Borrower, Click on the Borrower Tab.
- Remove the Group Name in the Group field and either replace with another Group Name or leave blank.
- If the Borrower is being moved to another Grant, click on the Magnifying Glass next to the Grant Name field to associate the Borrower with a different Grant.
- Click Save.

The screenshot shows the 'Borrower' form with tabs: Borrower, Dates, Borrower Funds, Lot, House, Construction, Grant, and Comments. The 'Borrower' tab is active. At the top are 'Save', 'Delete', and 'Cancel' buttons. The form fields include: Last Name: * (Wells), First Name: * (Helena), Middle Name: (G), Standing: * (New/Current), RD Borrower Id: (54323), Group: (Galaxy 1), Grant Name: * (Eureka 12/2019-12/2021), Date of Birth: (03/12/1983), Gender: (Female), Ethnicity: (Caucasian), Occupation: (Dental Assistant), Annual Adjusted Income: (\$23,500.00), Household Size: * (2), Disabled: (No), Deficient Housing: (No), Energy Efficiency Required: (No), Primary Funding Source: * (502), Income Level: * (Very Low Income), Marital Status: (Unmarried), Annual Income: (\$25,200.00), Dependents: (1), Type of Dwelling: (Living With Family), Extended Family: (No), RD Area Loan Limit: (\$210,000.00), and Loan Amount: (\$170,000.00). Red arrows point to the 'Save' button, the 'Group' field, the magnifying glass icon next to the 'Grant Name' field, and the 'Grant Name' field itself.

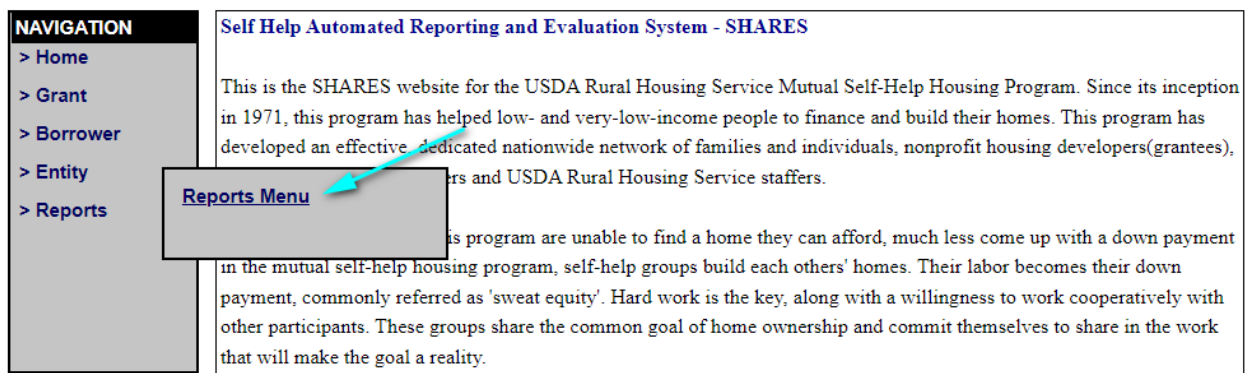
CHAPTER 9 – RUNNING REPORTS

SHARES offers numerous reports for both Grantees and USDA RD. They cover a wide range of information including demographics, reports based on 1944-I reporting requirements, contact information, statistical data and housing and loan data.

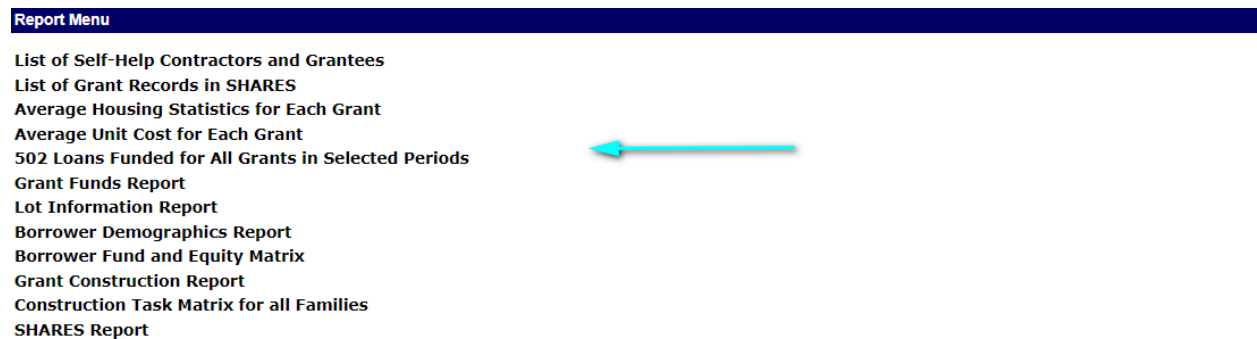
See Exhibits A-L for Report Examples.

REPORTS MENU

From the Navigation Menu, hover your Mouse over Reports then Click on Reports Menu.



From the Report Menu, Click on the name of the Report you would like to Run.



LIST OF SELF-HELP CONTRACTORS AND GRANTEES REPORT

This report includes contact information for both Grantees and their staff as well as contact information for each T&MA provider for each region.

See Exhibit B for sample.

What is in the report:

- ◇ Grantee or Contractor Name
- ◇ Address
- ◇ State
- ◇ Contact Person
- ◇ Phone
- ◇ Fax
- ◇ Email

To run the report:

- Click on List of Self-Help Contractors and Grantees.
- Click on the drop-down menu for Grantee Name, State or Status.
 - If you are looking for a specific Grantee's information, choose the Grantee Name.
 - If you are looking for Grantee information for any grantee in a specific state, choose State.
 - If you would like a full list of Grantees and Contractors, do not make any choices.
- Click Submit.

List of Self Help Contractors and Grantees

Submit Cancel

Grantee Name: [All] State: [All] Status: [All]

- After the report runs, in most browsers it will appear in the bottom left corner of your browser window.
- Click on the Report to open it.

USDA
Self Help Automated Reporting and Evaluation System

RD Home | News

NAVIGATION

- > Home
- > Grant
- > Borrower
- > Entity
- > Reports

List of Self Help Contractors and Grantees

Submit Cancel

Grantee Name: Test Entity State: All

Status: All

Report - 2021-10-2...xls

LIST OF GRANT RECORDS IN SHARES

The List of Grant Records Report will only show you your organization's grant records that have been input into SHARES. This report can give you a quick look at every grant and its basic history that you have. It is important to run this report periodically to ensure that you have closed any old grants in the system.

See Exhibit B for sample.

What is in the report:

- ◇ Grant Name
- ◇ Grantee Name
- ◇ Status
- ◇ Start Date (of grant)
- ◇ End Date (of grant)
- ◇ State
- ◇ Proposed Homes

To run the report:

- Click on List of List of Grant Records in SHARES.
- Click on the drop-down menu for Grantee Name and choose your organization.
- Click Submit.

List of Grant Records in SHARES

Submit Cancel

Grantee Name: Test Entity ▼ Grant Name: ▼

State: All ▼

AVERAGE HOUSING STATISTICS FOR GRANTS

The Average Housing Statistics for Grants Report will give you a great source of historical and statistical base for changes from grant to grant. This will also show you the RD Loan Limit changes and changes in equity from grant to grant. This is a good report to view if you are a new employee and not familiar with the historical date of the organization.

See Exhibit C for sample.

What is in the report:

- ◇ Grantee Name
- ◇ State
- ◇ Grant Name
- ◇ Status
- ◇ Proposed No. of homes
- ◇ Living Area
- ◇ No. of Bedrooms
- ◇ No. of Baths
- ◇ 1 car garage
- ◇ 2 car garage
- ◇ Car Port
- ◇ Appraised Value
- ◇ HUD Limit
- ◇ RD Loan Amount
- ◇ Total Funds
- ◇ Equity

To run the report:

- Click on List of Average Housing Statistics for Grants.

- Click on the drop-down menu for Grantee Name and choose your organization.
 - To look at only one grant, click on the Grant Name drop-down and choose the grant you want to view.
 - To look at all grants, Click on only the Grantee Name to view all grants.
- Click Submit

Average Housing Statistics for Grants

Submit Cancel

Grantee Name: Test Entity ▼ Grant Name: Eureka 12/2019-12/2021 ▼

AVERAGE UNIT COST FOR EACH GRANT

The Average Unit Cost for Each Grant is a good report to run to track 523 expenses and show changes in unit costs. This is a great report to run for Boards or accounting departments.

[See Exhibit D for sample.](#)

What is in the report:

- ◇ Grant Name
- ◇ State
- ◇ Grantee Name
- ◇ Grant Status
- ◇ Proposed No. of homes
- ◇ Total Grant Funds
- ◇ Approved Cost Per Unit
- ◇ 523 Funds Used
- ◇ Total Funds Used
- ◇ EUs Completed
- ◇ Cost per Unit (523 Funds)
- ◇ Cost Per Unit

To run the report:

- Click on List of Average Unit Cost for each Grant.
- Click on the drop-down menu for Grantee Name and choose your organization.
 - To look at only one grant, Click on the Grant Name drop-down and choose the grant you

- want to view.
- To look at all grants, Click on only the Grantee Name to view all grants.
- Click Submit.

Average Unit Cost for each Grant

Grantee Name: Test Entity ▼ Grant Name: Eureka 12/2019-12/2021 ▼

502 LOANS FUNDED FOR ALL GRANTS IN SELECTED PERIOD

The 502 Loans Funded for All Grants in Selected Period is a perfect report to show very low income and low income, loan closed dates, appraised values, equity, 502 loan funds and other funds on an individual basis as well as an average for all. This report can be ran for an individual grant or for all grants.

See Exhibit E for sample.

What is in the report:

- ◇ Grant Name
- ◇ Grantee
- ◇ State
- ◇ Borrower Name
- ◇ Income
- ◇ Loan Closed On
- ◇ Appraised Value
- ◇ Equity
- ◇ 502 Loan
- ◇ Other Funds
- ◇ Total Funds
- ◇ Totals and Averages of Appraised Value, Equity, 502 Loan, Other funds and Total Funds

To run the report:

- Click on List of 502 Loans Funded for All Grants in Selected Period.
- Click on the drop-down menu for Grantee Name and choose your organization.
- Click on the drop-down menu for Grant Name and choose the grant you would like to look at.
 - To look at all grants, leave the Grant Name field blank.

- Type the Grant Start Date in the MM/DD/YYYY format or Click on the Calendar Icon to choose the Grant Start Date.
- Type the Grant End Date in the MM/DD/YYYY format or Click on the Calendar Icon to choose the Grant End Date.
- Click Submit.

502 Loans Funded for All Grants in Selected Period

Submit Cancel

Grantee Name: Test Entity Grant Name: Eureka 12/2019-12/2021

Grant Start Date: 12/01/2019 Grant End Date: 12/31/2021

GRANT FUNDS

The Grant Funds Report should be included in the reports that are ran for each Quarterly Review Meeting. This report will show all funds used (spent) and all funds received (draw money received). This information should be entered regularly (preferably monthly).

See Exhibit F for sample.

What is in the report:

- ◇ Funds Received
- ◇ Funds Used
- ◇ Other Funds Used and Received
- ◇ Total Funds Used and Received
- ◇ Total Grant Funds
- ◇ Total 523 Funds Used
- ◇ Proposed Homes
- ◇ EUs Earned
- ◇ Actual Cost per Unit
- ◇ Approved Cost per Unit
- ◇ 523 Balance
- ◇ Other Balance
- ◇ Net Balance
- ◇ Fund Type
- ◇ Description
- ◇ Grant Date

To run the report:

- Click on List of Grant Funds for Grant Report.
- Click on the drop-down menu for Grantee Name and choose your organization.
- Click on the drop-down menu for Grant Name and choose the grant you would like to look at.
- Click Submit.

Grant Funds for Grant

Submit Cancel

Grantee Name: Test Entity ▼ Grant Name: Eureka 12/2019-12/2021 ▼

LOT INFORMATION REPORT

The Lot Information Report is a great way to keep track of all the lots you have in one grant. You can also check the status of each lot to see if they are available and you'll be able to see the sale prices and development fees for each lot. It's best to pull this before you assign lots to borrowers to ensure you have the correct information entered for each lot. Additionally, it can be used to ensure you have entered all of your lots into the correct grant.

See Exhibit G for sample.

What is in the report:

- ◇ Lot #
- ◇ Lot Status
- ◇ Lot Description
- ◇ Location
- ◇ Borrower Assigned
- ◇ Lot Area
- ◇ Sale Price
- ◇ Development Fees
- ◇ Water
- ◇ Sewer

To run the report:

- Click on Lot Information Report.
- Click on the drop-down menu for Grantee Name and choose your organization.
- Click on the drop-down menu for Grant Name and choose the grant you would like to look at.
 - To view all lots for all grants, leave the Grant Name blank.
- Click Submit.

BORROWER DEMOGRAPHICS REPORT

The Borrower Demographics Report is an important report to run so that you can ensure that you are following your Affirmative Fair Housing Marketing Plan. This report can determine if your ongoing marketing efforts are working, what overlap there might be in occupations, if your families are mostly living with family or renting and where you are getting most of your applicants. Utilizing the data in this report can help you determine what other marketing strategies might work for your area.

[See Exhibit H for sample.](#)

What is in the report:

- ◇ Lot #
- ◇ Lot Status
- ◇ Lot Description
- ◇ Location
- ◇ Borrower Assigned
- ◇ Lot Area
- ◇ Sale Price
- ◇ Development Fees
- ◇ Water
- ◇ Sewer

To run the report:

- Click on Borrower Demographics Report.
- Click on the drop-down menu for Grantee Name and choose your organization.
- Click on the drop-down menu for Grant Name and choose the grant you would like to look at.

- To view all Borrowers for all grants, leave the Grant Name blank.
- Click Submit.

Borrower Demographics Report

Submit Cancel

Grantee Name: Test Entity Grant Name: Eureka 12/2019-12/2021

BORROWER FUNDS AND EQUITY REPORT

The Borrower Funds and Equity Report is best used for annual and adjusted income for your whole group, assisting with marketing efforts and your Affirmative Fair Housing Marketing Plan, to be used as a snapshot to look at all additional funding and grants that you were able to obtain for your borrowers, and assisting with determining your TA costs based on equivalent value of a modest home calculation.

Important Note: You will still need to go through the process of getting the value from your State RD Office, but it will give you a good indication of what the number might be.

Important Note: If the appraised value is not entered, the equity is not going to show correctly in the report. The report shows the most accurate equity, and it deducts out the loans but leaves the grants.

See Exhibit I for sample.

What is in the report:

- ◇ Grant Name
- ◇ Grantee Name
- ◇ Borrower
- ◇ Group
- ◇ Lot Number
- ◇ Address
- ◇ Income
- ◇ Household Size
- ◇ Annual Income
- ◇ Adjusted Income

- ◇ Loan Limit
- ◇ RD Loan
- ◇ Other Leveraged Loan
- ◇ Deferred Loan
- ◇ Grants
- ◇ Total Funding
- ◇ Appraised Value
- ◇ Equity

To run the report:

- Click on Borrower Funds and Equity Report.
- Click on the drop-down menu for Grantee Name and choose your organization.
- Click on the drop-down menu for Grant Name and choose the grant you would like to look at.
 - To view all Borrowers for all grants, leave the Grant Name blank.
- Click Submit.

Borrower Funds And Equity Report

Submit Cancel

Grantee Name: Test Entity ▼ Grant Name: Eureka 12/2019-12/2021 ▼

GRANT CONSTRUCTION REPORT

The Grant Construction Report should be run for each Quarterly Review Meeting. This report is a great report to run to ensure your construction points, tasks completed, and total EUs are correct and/or up to date. You can also quickly find data entry error issues by running this report. Additionally, it can help identify how many units your organization's capacity can reasonably complete in two years.

See Exhibit J for sample.

What is in the report:

- ◇ Grant Name
- ◇ Grantee
- ◇ Borrower
- ◇ Group
- ◇ Lot
- ◇ Pledged Points

- ◇ Construction Start Date
- ◇ Construction End Date
- ◇ Months Elapsed
- ◇ Tasks Completed
- ◇ Construction Points
- ◇ Total EUs

To run the report:

- Click on Grant Construction Report.
- Click on the drop-down menu for Grantee Name and choose your organization.
- Click on the drop-down menu for Grant Name and choose the grant you would like to look at.
- Click Submit.

Grant Construction Report

Submit Cancel

Grantee Name: Test Entity ▼ Grant Name: Eureka 12/2019-12/2021 ▼

CONSTRUCTION TASK MATRIX FOR ALL FAMILIES

The Construction Task Matrix for All Families Report should be run for each Quarterly Review Meeting. This report helps USDA RD determine if you are staying on task with your build and can show any significant production delays. It is a great snapshot of where you are in the construction phase and how much time you might have left before conversions.

See Exhibit K for sample.

What is in the report:

- ◇ 27 Construction Tasks
- ◇ End dates for each task for each Borrower in the grant

To run the report:

- Click on Construction Task Matrix for All Families.
- Click on the drop-down menu for Grant Name and choose the grant you would like to look at.
- Type the Grant Start Date in the MM/DD/YYYY format or Click on the Calendar Icon to choose

the Grant Start Date.

- Type the Grant End Date in the MM/DD/YYYY format or Click on the Calendar Icon to choose the Grant End Date or use date you're running the report.
- Click Submit.

Construction Task Matrix for all Families

Grantee Name: Test Entity ▼ Grant Name: Eureka 12/2019-12/2021 ▼

As of Start Date: 12/01/2019 As of End Date: 12/31/2021

SHARES REPORT

The Shares Report should be provided at Quarterly Review Meetings and is a summary of the status and data of your program. This summary will provide the best snapshot of the program if the data is being entered into SHARES accurately and consistently. Any comments made in the Problems Tab of the Grant File will show up at the end of the report. This report pulls together all reporting requirements in the 1944-I Exhibit B-1 into one report. This report is available to be generated in different reporting periods including quarterly, grant to date, and monthly.

See Exhibit L for sample.

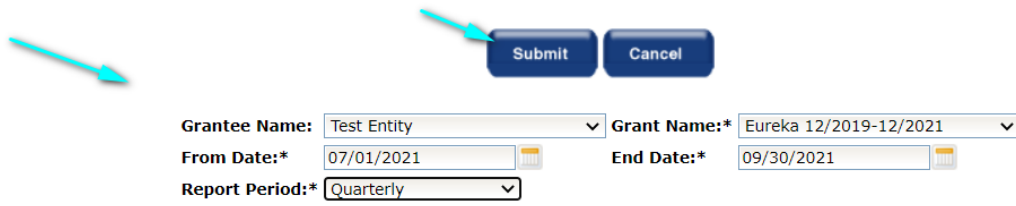
What is in the report:

- 1944-I required reporting information for each grant including, but not limited to,
 - ◇ Duration
 - ◇ Counties Served
 - ◇ Grant start and end dates
 - ◇ Total EUs based on reporting period ran

To run the report:

- Click on SHARES Report.
- Click on the drop-down menu for Grant Name and choose the grant you would like to look at.
- Type the Grant Start Date in the MM/DD/YYYY format or Click on the Calendar Icon to choose the Grant Start Date.
- Type the Grant End Date in the MM/DD/YYYY format or Click on the Calendar Icon to choose the Grant End Date.
- Click Submit.

Evaluation Report for Self-Help Technical Assistance Grants



Submit Cancel

Grantee Name: Test Entity ▼ Grant Name:* Eureka 12/2019-12/2021 ▼

From Date:* 07/01/2021 End Date:* 09/30/2021

Report Period:* Quarterly ▼

CHAPTER 10 – BEST PRACTICES

- Use lower case when searching.
- Use Exhibit P - Group Name Key Based on Status to organize all applicants and their status on the Grant Construction Report.
- Avoid using common naming conventions like Grant 1, or 2021-2023 Grant, include a unique name to distinguish from other grantees, for example initials for the subdivision and dates: BW 2021-2023.
- Review your reports for errors. Remember SHARES reports are based on AVERAGES and DATES.
 - Use the *Grant Construction Report* to look for suspected errors in your EU count, for example transposed dates such as 2013 or 2031. Since 2031 hasn't happened yet, SHARES wouldn't add the task completed in 2021 until 2031!
- Use the Metrics Tab under the Grant Module (File) to quickly view data for both Borrower and Grant data such as the number of Very Low vs Low income.
- Be sure to enter all comments (good and bad) into the Problems Tab of the Grant Module (File). USDA RD, especially the National RD Office can view the reports and/or comments in your SHARES records. It is important to keep track of anything that can or has impacted your production, your program, your staff, or your organization. These create a running record that can be used to clarify or justify requests, such as extensions. Do Not type over previous comments. Always create a new comment each time.
- Be sure to enter comments in the Comments Tab of the Borrower Module (File). These create a running record that can be used to keep track of issues or concerns that you have had with that borrower. For example, if you have a borrower that is not following the group agreement or has created problems, this is a good place to keep that information. It's easy to forget the small things that can add up to big problems. Anything kept in this section does not generate in any reports, however you can do a print screen. This is a great way to document concerns, issues and conversations on a borrower-to-borrower basis.
- The more data you enter into the system, the more data that you will be able to generate in reports. Fill in all fields in all Tabs to ensure that your reports are as accurate as possible.
- Ensure that your Executive Director or your designated signer per your grant application signs your SHARES Report for each Quarterly Review Meeting to attest to the information contained in the report.
- SAVING a hard copy of your reports quarterly is required – it's in the 1944-I Instructions.
- Use the SHARES Data Matrix to help locate data issues in reports.

CHAPTER 11 – SHARES DATA MATRIX

The SHARES Data Matrix has been provided as a tool to identify data sources within SHARES. If questions arise concerning a data issue or anomaly in a report The SHARES Data Matrix can help identify the source of the data mapping out where the original data was input, which can provide information on data entry mistakes or issues.

List of Self-Help Contractors and Grantees Report		
Report Column or Field	Module-Screen-Field	Additional Information
Name	Entity-Entity-Entity Name	
Type	Entity-Entity-Entity Type	
Address	Entity-Address-Mailing Address lines	
State	Entity-Individual Name or First Name and Last Name	
Contact Person	Entity-Individual Name or First Name and Last Name	
Phone	Entity-Contacts	For Primary Phone Contact Type, the most recently added will be used
Fax	Entity-Contacts	For Fax Contact Type the most recently added will be used
Email	Entity-Contacts	For Email contact Type the most recently added will be used

List of Grant Records in SHARES Report		
Report Column or Field	Module-Screen-Field	Additional Information
Grant Name		
Grantee Name	Entity-Entity-Entity Name	
Status		
Start Date	Grant-Grant-Grant Start Date	
End Date	Grant-Grant-Grant End Date	
State	Grant-Grant-State	
Proposed Homes		

Average Housing Statistics for Each Grant Report		
Report Column or Field	Module-Screen-Field	Additional Information
Grantee Name	Entity-Entity-Entity Name	
State	Grant-Grant-State	
Grant Name	Grant-Grant-Grant Name	
Status	Grant-Grant-Status	
Proposed Homes	Grant-Grant-Proposed Number of Homes	
Living Area	Borrower-House-Living Area	Can also be updated thru Grant-Houses=>House-Living Area
Number of Bedrooms	Borrower-House-Number of Bedrooms	Can also be updated thru Grant-Houses=>House-Number of Bedrooms
Number of Baths	Borrower-House-Number of Bathrooms	Can also be updated thru Grant-Houses=>House-Number of Bathrooms
1 Car Garage	Borrower-House-Garage Type	Can also be updated thru Grant-Houses=>House-Garage Type
2 Car Garage	Borrower-House-Garage Type	Can also be updated thru Grant-Houses=>House-Garage Type
Car Port	Borrower-House-Garage Type	Can also be updated thru Grant-Houses=>House-Garage Type
Appraised Value	Borrower-House-Appraised Value	Can also be updated thru Grant-Houses=>House-Appraised Value
HUD Limit	Borrower-Borrower-RD Area Loan Amount	
RD Loan Amount	Borrower-Borrower-502 Loan Amount	
Total Funds	Borrower-Borrower Funds-Amount	Report displays the aggregation of all Borrower Funds
Equity	Derived by subtracting Total Funds from Appraised Value	

Average Unit Cost for each Grant Report		
Report Column or Field	Module-Screen-Field	Additional Information
Grant Name	Grant-Grant-Grantee Name	
State	Grant-Grant-State	
Grantee	Entity-Entity-Entity Name	
Grant Status	Grant-Grant-Status	
Proposed Number of Homes	Grant-Grant-Proposed Number of Homes	
Total Grant Funds	Grant-Grant-Initial Grant Amount	
Approved Cost per Unit	Derived by dividing the Total Grant Funds by Proposed Number of Homes	
523 Funds Used	Total of Grant-Grant Funds-Grant Funds Used Amount for Type 523	
Total Funds Used	Total Grant-Grant Funds-Grant Funds Used Amount for All Types	
EUs Completed	Derived by aggregating the Points for each Task in the Construction screen where the End Date is filled in multiplied by .8 and adding it to the Points for the Preconstruction Tasks completed which are sourced from Borrower-Dates Eligibility Determined Date and the Loan Closed Date	
Cost per Unit (523 Funds)	Derived by dividing 523 Funds Used by Proposed Number of Homes	
Cost per Unit	Derived by dividing Total Funds Used by Proposed Number of Homes	

502 Loans Funded for All Grants in Selected Periods Report		
Report Column or Field	Module-Screen-Field	Additional Information
Grant Name	Grant-Grant-Grant Name	
Grantee Name	Entity-Entity-Entity Name	
State	Grant-Grant-State	
Borrower name	Borrower-Borrower-Last Name andFirst Name	
Income	Borrower-Borrower-Annual Income	
Loan Closed On	Borrower-Dates-Loan Closed Date	
Appraised Value	Borrower-House-Appraised Value	
Equity	Derived by subtracting Borrower Funds from Appraised Value	
502 Loan	Borrower-Borrower Funds- Amountfor 502 Funds	
Other Funds	Borrower-Borrower Funds- Amountfor Non-502 Funds	
Total Funds	Borrower-Borrower Funds- Amountfor All Funds	

Grant Funds Report		
Report Column or Field	Module-Screen-Field	Additional Information
Fund Received-Fund Type	Grant-Grant Funds-Funds ReceivedSection-Source	
Fund Received- Description	Grant-Grant Funds-Funds ReceivedSection-Description	
Fund Received-Fund Date	Grant-Grant Funds-Funds ReceivedSection-Date	
Fund Received - Amount	Grant-Grant Funds-Funds ReceivedSection-Amount	

Fund Used-Fund Type	Grant-Grant Funds-Funds Used Section-Source	
Fund Used-Description	Grant-Grant Funds-Funds Used Section-Description	
Fund Used-Fund Date	Grant-Grant Funds-Funds Used Section-Date	
Fund Used-Amount	Grant-Grant Funds-Funds Used Section-Amount	

Lot Information Report		
Report Column or Field	Module-Screen-Field	Additional Information
Lot #	Borrower-Lot-Lot Number	
Lot Status	Borrower-Lot-Lot Status	
Lot Description	Borrower-Lot-Lot Description	
Location	Borrower-Lot-Lot Location section-Lot Address fields	Uses Lot Description unless Address Line 1 is filled in
Borrower Assigned	Borrower-Lot-Borrower section-Borrower	Use the search icon to the right of the RD Borrower ID to search for the correct Borrower
Lot Area	Borrower-Lot-Lot Size	
Sale Price	Borrower-Lot-Sale Price	
Development Fees	Borrower-Lot-Development Fees	
Water	Borrower-Lot-Water	
Sewer	Borrower-Lot-Sewer	

Borrower Demographics Report		
Report Column or Field	Module-Screen-Field	Additional Information
Borrower	Borrower-Borrower-Last Name and First Name	
Borrower Group	Borrower-Borrower-Group	

Standing	Borrower-Borrower-Standing	
Docket Status	Borrower-Dates	Derived from Approved Date, Loan Closed Date, Application Withdrawn Date and Application Rejection Date
Docket Start Date	Borrower-Dates	Derived from Approved Date, Loan Closed Date, Application Withdrawn Date and Application Rejection Date
Funding	Borrower-Borrower Funding-Type and Amount	Amounts Aggregated by Type
Income	Borrower-Borrower-Annual Income	
Occupation	Borrower-Borrower-Occupation	
Household Size	Borrower-Borrower-Household Size	
Type of Dwelling	Borrower-Borrower-Type of Dwelling	
Disabled	Borrower-Borrower-Disabled	
Extended	Borrower-Borrower-Extended Family	
Deficient Housing	Borrower-Borrower-Deficient Housing	
502 Account	Borrower-Borrower-RD Borrower ID	
Congressional District	Borrower-Borrower-Lot-Congressional District	
Ethnicity	Borrower-Borrower-Ethnicity	
Gender	Borrower-Borrower-Gender	
Marital Status	Borrower-Borrower-Marital Status	
Energy Efficiency Required	Borrower-Borrower-Energy Efficiency Required	

Borrower Fund and Equity Matrix Report		
Report Column or Field	Module-Screen-Field	Additional Information
Grant Name	Grant-Grant-Grant Name	
Grantee Name	Entity-Entity-Entity Name	
Borrower	Borrower-Borrower-Last Name and First Name	
Group	Borrower-Borrower-Group	
Lot Number	Borrower-Lot-Lot Number	
Address	Borrower-Lot-Lot Location section-Lot Address fields	
Income	Borrower-Borrower-Income Level	
Household Size	Borrower-Borrower-Household Size	
Annual Income	Borrower-Borrower-Annual Income	
Adjusted Income	Borrower-Borrower-Annual Adjusted Income	
Loan Limit	Borrower-Borrower-RD Area Loan Limit	
RD Loan	Borrower-Borrower Funds Fund Type = RD Loan and Amount	
Other Leveraged Loan	Borrower-Borrower Funds Fund Type = Other and Amount	
Deferred Loans	Borrower-Borrower Funds Fund Type = Deferred Loan and Amount	
Grants	Borrower-Borrower Funds Fund Type = Grant and Amount	
Total Funds	Borrower-Borrower Funds Aggregate All Fund Types and	
Appraised Value	Borrower-Borrower-Appraised Value	
Equity	Derived by subtracting Borrower Funds from Appraised Value	

Grant Construction Report		
Report Column or Field	Module-Screen-Field	Additional Information
Grant Name	Grant-Grant-Grant Name	
Grantee Name	Entity-Entity-Entity Name	
Borrower	Borrower-Borrower-Last Name and First Name	
Group	Borrower-Borrower-Group	
Lot	Borrower-Lot-Lot Number	
Pledged Points	Derived by aggregating the Points associated with the Construction Tasks completed as denoted by the End Date being filled in and the Pledge box is checked	
Construction Start Date	Borrower-Construction-Start Date	Derived from Earliest Construction Task Start Date
Construction End Date	Borrower-Construction-End Date	Derived from Latest Construction Task End Date
Months Elapsed	Derived from number of months between Construction Start Date and Construction Date	
Tasks Completed	Derived by the number of Construction Tasks completed as denoted by the End Date being filled in	
Construction Points	Derived by aggregating the Points associated with the Construction Tasks completed as denoted by the End Date being filled in	
Total EUs	Derived by aggregating the Points for each Task in the Construction screen where the End Date is filled in multiplied by .8 and adding it to	

	the Points for the Preconstruction Tasks completed, which are sourced from Borrower-Dates Eligibility Determined Date and the Loan Closed Date	
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Construction Task Matrix for All Families Report		
Report Column or Field	Module-Screen-Field	Additional Information
Grant Name	Grant-Grant-Grant Name	
Grantee Name	Grant-Grant-Grantee Name	
Construction Type	Borrower-House-Construction Style	
Item	Borrower-House-Seq	Can only be changed by the SHARES System Administrator
Construction Task	Borrower-House-Task	Can only be changed by the SHARES System Administrator
Points	Borrower-House-Points	Can only be changed by the SHARES System Administrator
Family (Displays in column as the Borrower Name)	Borrower-Borrower-Last Name and First Name	

SHARES Report		
Report Column or Field	Module-Screen-Field	Additional Information
Name of Grantee	Entity-Entity-Entity Name	
Address	Entity-Address-Address Lines	
Grant Name	Grant-Grant-Grant Name	
Duration	Grant-Grant-Proposed Grant Period	

County Served	Grant-Grant-County	
Grant Start Date	Grant-Grant-Grant Start Date	
Grant End Date	Grant-Grant-Grant End Date	
Total EUs for this Period – Actual	Derived by aggregating the Points for each Task in the Construction screen (both areas Pre and Construction) where the End Date is filled and within the Date Range on the SHARES report filter screen, then multiplied by .8	
Total EUs for Period – Planned	Derived by dividing the Proposed Number of Homes by Proposed Grant Period (in months) and then multiplying by 3 (for a quarter)	
Total EUs for Grant to Date – Actual	Derived by aggregating the Points for each Task in the Construction screen (both areas Pre and Construction) where the End Date is filled then multiplied by .8	
Total EUs Grant to date – Planned	Derived by dividing the Proposed Number of Homes by Proposed Grant Period (in months) and then multiplying by the number of months since the Grant started	
Pre-construction EUs for this Period for Loans Pending	Derived by aggregating the Points earned by becoming Eligible for the Self-Help Program during the Date Range on the SHARES report filter screen and the Loan is still Pending	
Pre-construction EUs for Grant to date for Loans Pending	Derived by aggregating the Points earned by becoming Eligible for the Self-Help Program to Date and the Loan is still Pending	

Total EUs for Month 1 of this Quarter	Derived by aggregating the Points foreach Task in the Construction screen (both areas Pre and Construction) where the End Date is filled and within the first month of the Date Range on the SHARES report filter screen, then multiplied by .8	
Total EUs for Month 2 of this Quarter	Derived by aggregating the Points foreach Task in the Construction screen (both areas Pre and Construction) where the End Date is filled and within the second month of the Date Range on the SHARES report filter screen, then multiplied by .8	
Total EUs for Month 3 of this Quarter	Derived by aggregating the Points foreach Task in the Construction screen (both areas Pre and Construction) where the End Date is filled and within the third month of the Date Range on the SHARES report filter screen, then multiplied by .8	
Total Number of Houses for each Method of Construction	Borrower-House-Method Type. Aggregate total Houses by Method Type under the Grant.	Does not include Borrowers who have not been associated to a House.
Average for all Houses completed under this Grant – Living Area	Borrower-House-Living Area. Average the Living Area for each House under the Grant.	Does not include Borrowers who have not been associated to a House.
Average for all Houses completed under this Grant – Bedrooms	Borrower-House-Number of Bedrooms. Average the Number of Bedrooms per House under the Grant.	Does not include Borrowers who have not been associated to a House.

Average for all Houses completed under this Grant – Bathrooms	Borrower-House-Number of Bathrooms. Average the Number of Bathrooms per House under the Grant.	Does not include Borrowers who have not been associated to a House.
Household Size for Families in this Grant	Borrower-Borrower-Household Size. Average the Household Size per Borrower under the Grant.	Does not include Borrowers who have not been associated to a House.
Number of Houses proposed under this Grant	Grant-Grant-Proposed Number of Homes	
Number of Families in Pre-Construction	Derived by aggregating the Points for each Task in the Construction screen (both areas Pre and Construction) where the End Date is filled then multiplied by .8 and then only counting those Houses where the EU = 1, i.e., it's been completed.	
Number of Families Contacted	Derived by counting the Borrowers under the Grant that have had their Eligibility determined as being eligible but still have an EU < .21	
Number of Low-Income Families	Not included in SHARES at this time but can still be tracked outside of SHARES and reported here.	Does not include Borrowers who have not been associated to a House.
Number of Very-Low Income Families	Borrower-Borrower-Income Level - Count of the number of Borrowers under the Grant where Income Level = Low	Does not include Borrowers who have not been associated to a House.
Number of Construction Supervisors	Grant-Grant-Construction Supervisors	
Number of TA Employees	Grant-Grant-Number of TA Staff	
Average Appraisal Value of Units for this	Borrower-House-Appraisal Value. Average the Appraisal Value for	Does not include Borrowers who have not been associated to a House.

Grant	all the Houses under the Grant where Appraisal Value is not null.	
Average Loan Amount for this Grant	Borrower-Borrower Funds-Amount for RD Loans and Deferred Loans.	Does not include Borrowers who do not have Loan Funds entered or Borrowers who have not been associated to a House.
Average Time needed to construct a house under this Grant	Average Number of Days to complete a House under the Grant.	Does not include Borrowers who have not been associated to a House.
Number of Days between submission of Self-Help Borrower's docket and approval/rejection	Average Number of Days between (Borrower-Borrower-Application Completed Date) Borrower Submission and the Date the Loan was Borrower-Dates-Approved Date or Borrower-Dates-Application Rejection Date.	
Total number of loan dockets approved or rejected	Total number of Borrowers under the Grant where the Borrower-Dates-Date Approved is filled or Borrower-Dates-Application Rejection Date is filled.	
Total number of docket rejections Grant to Date	Total number of Borrowers under the Grant where the Borrower-Dates-Date Approved is filled or Borrower-Dates-Application Rejection Date is filled.	
Grantee's ability to accomplish program objectives?		
Reviewed By	Grant-Reviews-Reviewer	Filled in by the system based on Security (EAuth) data
Comments By	Grant-Reviews-Comments	
Review Date	Grant-Reviews-Review Date	Report only pulls those for the period requested by the SHARES Date Range filter and the Period filter

CHAPTER 12 – TROUBLESHOOTING

Problem	Prevention	Fix
Multiple entries for Borrowers as files or in reports	Ensure that all steps are performed in the correct order for entering Borrowers and Grant Information.	Follow directions in Chapter 8 for deleting a borrower. Take down all information for borrower that is being duplicated then Delete all entries for that Borrower. After deleting the Borrower create a new file for them by following the directions in Chapter 6.
Unable to open the Construction Tab	Without a lot or house the construction tab will be unavailable.	Ensure that you have a lot and house attached to the Borrower File.
Duplicate tasks showing on the Construction Tab	Ensure that all steps are performed in the correct order for entering Borrowers and Grant Information.	Follow directions in Chapter 8 for deleting a borrower. Take down all information for borrower that is being duplicated then Delete all entries for that Borrower. After deleting the Borrower create a new file for them by following the directions in Chapter 6.
EU's are not accurate	Always choose unique grant names and group names. Fill out all necessary data in each Tab.	• Ensure that your grant name is unique and contains both numbers and names. If it is not, change the grant name in the Grant Module (File). • Ensure that group name is unique and contains both numbers and names. If it is not, change the group name in all Borrower Files in that group. • Run a construction report to review and ensure that your dates have all been entered correctly.

Comments not showing up in SHARES Report	Ensure the dates match the report dates that are being run.	Ensure that the dates are correct and match the dates for the period you are reporting for (i.e. Monthly, Quarterly to Date reports). Additionally, ensure that the time period is set to the appropriate period that coincides with your dates.
No SHARES role defined for you	Ensure you followed all steps to gain access to SHARES.	• Create an account at https://shares.sc.egov.usda.gov • Confirm your identity with USDA RD • Contact your regional TRC and give them your full name that was used to sign up (including middle name or initial if one was used), your company name, address, phone number and your new login username you signed up with (do not send password)
Your Reports are not generating	Determined by the fix that was used.	• Check your downloads file in your browser. • Look at the bottom of your browser page. • Clear your Cache and Cookies from your Browser and restart your computer.
Unable to login to SHARES	• Ensure all steps are followed for signing up for SHARES. • Keep your email address/username and password in secure location. • Ensure Level 2 access to	• Create an account at https://shares.sc.egov.usda.gov • Confirm your identity with USDA RD Contact your regional TRC and give them your full name that was used to

	SHARES has been granted. • Ensure that regional TRC provider is notified of Name changes or Account Updates you made on the SHARES login Screen.	sign up (including middle name or initial if one was used), your company name, address, phone number and your new login username you signed up with (do not send password).
Very low- and Low-Income status does not show in reports	None	The loans must be closed for the status to be populated in reports.
Grant Funds Report is missing data	Ensure all data is filled in, in the Grant Module (File)	Fill in Proposed Grant amount and Grant period on Grant Tab then fill in both Funds Received and Funds Used amounts in the Grant Funds Tab.
Missing points for construction tasks	Ensure that Construction Style has the correct style choice chosen.	Open the Borrower's Module (File) that is missing points then click on the House Tab and ensure that you have the correct style chosen for the Construction Style field.

EXHIBITS

Exhibit A – List of SH Contractors and Grantees

List of Self-Help Contractors and Grantees								
As of: Oct 29, 2021	Name	Type	Address	State	Contact Person	Phone	Fax	Email
	21st Century Homestead, Inc.	Grantee	600 South Huston Street, P.O. Box 771, Allamont, KS 67330	KS	Robert Broadway	(316) 784-2177	(316) 784-2665	21stcentury@allamontks.com
	Accomack-Norfolk Housing & Redevelopment Corporation	Grantee	P.O. Box 387, Accomack, VA 23001	VA	David Amis	757-787-3800	757-787-4221	amdc@evanet.net
	Affordable Housing Enterprises, Inc.	Grantee	333 S. 9th Street, Griffin, GA 30223	GA		770-412-0555	770-238-4508	affordablehousingent@yahoo.com
	Affordable Rural Self-Help Housing, Inc.	Grantee	200 Widdem Drive, Suite 200C, South Shields Drive, ME 04281	ME		(207) 233-4567	(207) 233-4567	robert.weber@atlusdagov
	Alto-American Cultural Society of the Golden Triangle	Grantee	DBA Brickline Project, 143 West Side Drive, Starbuck, MS 39759	MS		662-320-4171	662-320-4173	chaktaylor@yahoo.com
	Alaska Community Development Corporation	Grantee	1517 Industrial Way #2, Palmer, AK 99645	AK		907-746-5680	907-746-5681	akcdc@nhaonline.net
	America's Dream	Grantee	201 West Walnut St. Suite 202, Green Bay, WI 54303	WI		920-366-2663		americasdream@stgglobal.net
	American Eagles Associates, Inc.	Grantee	8308 Washington NE, Albuquerque, NM 87113	NM	Jorge Palumbo	(505) 97-8674	(505) 97-8658	NMNAHO@aol.com
	Asociación Campesina Lazo o Cardenas, Inc.	Grantee	42 North Sutter St., #405, Stockton, CA 95202	CA	Winnie R. Oniveros	(209) 466-6811	(209) 466-3465	woniveros@aol.com
	Bay de Noc Habitat for Humanity	Grantee	2717 Danforth Road, Escanaba, MI 49829	MI	Howard Purcell	(906) 789-4663	(906) 789-6329	
	Beaule & Spink Enterprise Community Inc.	Grantee	P.O. Box 68, Yala, SD 57386	SD	Andrea Torgerson	605-599-2991	605-599-2992	
	Bread of Life Ministries	Grantee	157 Water Street, Augusta, ME 04330	ME	John C. Asplin	207-636-3434	207-621-5385	breadoflifeministries@msn.net
	Burlingame Valley, Inc.	Grantee	501 Park Ave., S., PO Box 879, Hohenwald, TN 38462	TN	Jerry Risner	931-786-4256	931-786-5124	jferis@burlingamevalley.org
	Burbank Housing Development Corp.	Grantee	790 Sonoma Avenue, Santa Rosa, CA 95404	CA	Angela Morgan	(707) 303-1027	(707) 326-9811	amorgan@burbankhousing.org
	CAC of Fayette County	Grantee	1400 US Highway 22 NW, Fayette Co., Washington Court House, OH 43160	OH		(740) 335-1831	(740) 335-2190	scores@carfayettecounty.org
	COC of Madison County	Grantee	108 E. Market Street, P.O. Box 103, Bennettsville, SC 29512	SC		843-454-2188	843-454-2199	cdmccl@bellsouth.net
	Compassion Unions	Grantee	1005 C Street, P.O. Box 39, Brawley, CA 92227	CA	Marvin Mayne	761-331-5125	761-344-0322	marvmm@cubrawley.com
	Caroline County Habitat for Humanity	Grantee	PO Box 392, 114 Market Street, Ste 300, Denton, MD 21629	MD	Leslie Borne	410-479-2020	410-482-8968	cothfh@dmv.com
	Caroline County Habitat for Humanity VA	Grantee	P.O. Box 365, Bowling Green, VA 22427	VA		804-596-2811		
	Catholic Charities Housing Opportunities	Grantee	225 Elm Street, Youngstown, OH 44503	OH	George Gardner	330-744-4419	330-744-3969	COHO@cboss.com
	Catholic Community Services Inc.	Grantee	1416 Cummings Av, Superior, WI 54880	WI	Gary Valley	715-394-6617	715-394-5951	gvalley@ccbsuperior.org
	Celina Housing and Economic Development Corporation	Grantee	252 Laurel Pinaro Avenue, PO Box 203, Celina, PA 07735	PA	Hector Nieves-Baez	787-885-3020	787-885-0716	
	Central Mississippi, Inc.	Grantee	P.O. Box 749, Winona, MS 38567	MS	Pamela Gary	(662) 283-4781	(662) 283-2352	mgary@centralmississippi.net
	Central Oklahoma Community Action Agency	Grantee	429 N. Union Street, P.O. Box 486, Shawnee, OK 74802	OK		405-275-6060	(405) 275-0317	kyhne@occaa.org
	Central Oregon Community Action Agency	Grantee	2303 SW First Street, Redmond, OR 97756	OR	Marcus Lopez	(541) 548-2380	(541) 548-6013	carweb@conet.com
	Cherokee Nation	Grantee	4149 M-75 North, P.O. Box 336, Wallonia Lake, MI 49756	MI	Yvonne Howery	(231) 335-5166	(231) 335-5163	yhowery@bntmail.com
	Chicanos Por La Causa	Grantee	P.O. Box 948, Tijuana, QX 74465	QX		(918) 458-5248	(918) 458-5018	dauid-southernland@cherokeec.org
	Chicoch Housing Assistance Corporation - Ashley & Drew	Grantee	575 N Grand Ave, Nogales, AZ 85621	AZ	Alejandro Martinez	(520) 281-4570	(520) 281-9689	alejandro.martinez@plc.org
	Chicoch Housing Assistance Corporation - Dakota & Jesta	Grantee	212 E. Lincoln Street, Hamburg, AR 71646	AR	Jon Carnella	(870) 853-8502	(870) 853-8502	chacashq@msn.com
	Chippola Rainbow Homebuilders Association, Inc.	Grantee	409 Main Street, Lake Village, AR 71653	AR	Jon Carnella	(870) 853-3237	(870) 853-3237	chacohq@aol.com
	Christian Housing Development Organization, Inc.	Grantee	2883 Green Street, Suite 2A, P.O. Box 917, Marianna, FL 32447	FL	Elmore Bryant	(850) 482-3766	(850) 482-7089	chra@phond.com
	Citizens for Affordable Homes, Inc.	Grantee	1185 McCrary Rd., Suite 145, P. O. Box 1042, Columbus, MS 39203	MS		662-329-0066	662-329-8886	christiandevhq@bellsouth.net
	City of Brawley	Grantee	100 Pine Cone Road, Dayton, NV 89403	NV	Ron Trunk	(775) 883-7101	(775) 883-7115	ron@cafhnev.org
	City of Casa Grande Housing Division	Grantee	205 Imperial Avenue, Brawley, CA 92227	CA	Francisco Soto	(760) 344-8622	(760) 351-2656	franciscosoto@yahoo.com
	City of Junction City	Grantee	1501 E. Florence Blvd., Casa Grande, AZ 85222	AZ	Rosa E. Bruce	(520) 421-9600	(520) 421-9602	rosab@ci.casagrandeaz.us
	City of Lake City Affordable Homes	Grantee	PO Box 287, Junction City, KS 66441	KS		785-738-3103	785-738-3102	dan.pfeiffer@ci.jctks.com
	City of Laurel	Grantee	150 North Alachua Street, P.O. Box 1687, Lake City, FL 32055	FL	W. R. Kirkland	904-752-0381	904-752-4886	colcpod@scgroup.net
	City of Liberal	Grantee	401 North 5th Street, Laurel, MS 39441	MS	Mary Edmonson	601-428-6020	601-428-5415	maryedmonson@laurelms.com
	City of Moss Point	Grantee	324 N. Kansas Ave., Liberal, KS 67801	KS		(620) 626-2250	(620) 626-0589	karen.laferriere@cityliberal.org
	City of Rawlins	Grantee	4412 Denny Street, Moss Point, MS 39563	MS	Daphne Viverette	(228) 474-2345	(228) 474-2501	godaphne_v@yahoo.com
	City of Shawnee	Grantee	PO Box 953, Rawlins, WY 82301	WY	Ron Kluge	(307) 328-4513	(307) 328-4580	ronkluge@rawlins-wyoming.com

Exhibit B – List of Grant Records in SHARES

List of Grant Records in SHARES							
As of : Oct 29, 2021							
Grant Name	Grantee Name	Status	Start Date	End Date	State	Proposed Homes	
Eureka 03/2021 - 03/2023	Test Entity	Current Grant	03/31/2021	03/30/2023	CO	24	
Eureka 09/30/2021-09/29/2023	Test Entity	Current Grant	09/30/2021	09/29/2023	CO	30	
Eureka 12/2019-12/2021	Test Entity	Current Grant	12/20/2019	12/19/2022	CO	24	
Fake Grant 9999	Test Entity	Current Grant	12/15/2011	12/15/2013	MT	20	
Space Station 1	Test Entity	Current Grant	07/07/2020	07/06/2022	MO	20	

Exhibit C – Average Housing Statistics for Grants

Average Housing Statistics for Grants															
As of: Oct 29, 2021															
Proposed															
Grantee Name	State	Grant Name	Status	No of homes	Living Area	No of Bedrooms	No of Baths	1 car garage	2 car garage	Car Port	Appraised Value	HUD Limit	RD Loan Amount	Total Funds	Equity
Test Entity	CO	Eureka 03/2021 - 03/2023	Current Grant	24	1400	3.00	2.00	0.00%	100.00%	0.00%	\$260,000.00	\$253,000.00	\$200,000.00	\$200,000.00	\$60,000.00
Test Entity	CO	Eureka 12/2019-12/2021	Current Grant	24	1544	3.00	2.00	0.00%	100.00%	0.00%	\$230,778.00	\$227,222.00	\$185,544.00	\$189,433.00	\$41,345.00
Test Entity	MT	Fake Grant 9999	Current Grant	20	0	0.00	0.00	0.00%	0.00%	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Test Entity	MO	Space Station 1	Current Grant	20	1400	3.00	2.00	0.00%	100.00%	0.00%	\$205,000.00	\$210,000.00	\$185,000.00	\$185,000.00	\$20,000.00

Exhibit D – Average Unit Cost for each Grant

Average Unit Cost for each Grant												
As of : Oct 29, 2021												
Grant Name	State	Grantee	Grant Status	Proposed No of homes	Total Grant Funds	Approved Cost Per Unit	523 Funds Used	Total Funds Used	EUs Completed	Cost per Unit(523 Funds)	Cost Per Unit	
Eureka 03/2021 - 03/2023	CO	Test Entity	Current Grant	24	\$768,000.00	\$32,000.00	\$48,400.00	\$768,000.00	0.4	\$131,000.00	\$121,000.00	
Eureka 09/30/2021-09/29/2023	CO	Test Entity	Current Grant	30	\$1,200,000.00	\$40,000.00	\$50,000.00	\$1,200,000.00	0.0	\$-	\$-	
Eureka 12/2019-12/2021	CO	Test Entity	Current Grant	24	\$1,136,000.00	\$47,333.33	\$351,060.00	\$1,136,000.00	3.956	\$96,324.57	\$88,741.15	
Fake Grant 9999	MT	Test Entity	Current Grant	20	\$100,000.00	\$5,000.00	\$-	\$100,000.00	0.0	\$-	\$-	
Space Station 1	MO	Test Entity	Current Grant	20	\$-	\$-	\$29,166.00	\$-	0.224	\$130,205.36	\$130,205.36	
		Test Entity		0	\$-	\$-	\$-	\$-	0.0	\$-	\$-	

Exhibit E – 502 Loans Funded for All Grants in Selected Period

502 Loans Funded for All Grants in Selected Period										
As of : Oct 29,2021										
Grant Name	Grantee	State	Borrower Name	Income	Loan Closed On	Appraised		502 Loan	Other Funds	Total Funds
						Value	Equity			
Eureka 03/2021 - 03/2023	Test Entity	CO	Yoda, Gogu,	Very Low Income	05/29/2021	\$260,000.00	\$60,000.00	\$200,000.00	\$0.00	\$200,000.00
Eureka 12/2019-12/2021	Test Entity	CO	Calvert, Rosalee,	Low Income	05/29/2021	\$267,000.00	\$47,000.00	\$205,000.00	\$15,000.00	\$220,000.00
Eureka 12/2019-12/2021	Test Entity	CO	OBrien, Maggie,	Low Income	05/25/2021	\$265,000.00	\$45,000.00	\$220,000.00	\$0.00	\$220,000.00
Eureka 12/2019-12/2021	Test Entity	CO	Steno, Jill,	Very Low Income	05/29/2021	\$260,000.00	\$50,000.00	\$200,000.00	\$10,000.00	\$210,000.00
	Totals:					\$1,052,000.00	\$202,000.00	\$825,000.00	\$25,000.00	\$850,000.00
	Averages:					\$263,000.00	\$50,500.00	\$206,250.00	\$6,250.00	\$212,500.00

Exhibit F - Grant Funds for Grant Report

Grant Funds for Grant						
			Eureka 12/2019-12/2021			
			Test Entity			
Funds Received						
Fund Type	Description	Grant Date	Amount			
523 Grant	Draw 1 - Groups 1 & 2	01/31/2020	\$16,700.00			
523 Grant	Draw 2 - Groups 1 & 2	02/28/2020	\$22,000.00			
523 Grant	Draw 3 - Groups 1 & 2	03/31/2020	\$18,560.00			
523 Grant	Draw 4 - Groups 1 & 2	04/30/2020	\$80,000.00			
523 Grant	Draw 5 - Groups 1 & 2	05/29/2020	\$80,000.00			
523 Grant	Draw 6 - Groups 1 & 2	06/30/2020	\$18,560.00			
	\$235,820.00		\$0.00			\$235,820.00
523 Funds Received:			Other Funds Received:			Total Funds Received:
Funds Used						
Fund Type	Description	Grant Date	Amount			
Other	Home Grant-2 of 4	01/15/2020	\$15,000.00			
523 Grant	Monthly expenses-January	01/31/2020	\$22,000.00			
523 Grant	Monthly expenses-February	02/28/2020	\$88,560.00			
523 Grant	Monthly expenses-March	03/31/2020	\$80,000.00			
523 Grant	Monthly expenses-April	04/30/2020	\$18,000.00			
523 Grant	Monthly expenses-May	05/29/2020	\$22,000.00			
523 Grant	Monthly expenses-June	06/30/2020	\$45,000.00			
523 Grant	Development Funds Used	12/01/2020	\$65,000.00			
Other	Home Grant-1 of 4	12/15/2020	\$15,000.00			
523 Grant	Monthly expenses-December	12/31/2020	\$10,500.00			
	\$351,060.00		\$30,000.00			\$381,060.00
523 Funds Used :			Other Funds Used :			Total Funds Used :
Total Grant Funds :	\$1,136,000.00	Proposed Homes :	24	Approved Cost Per Unit:	\$47,333.33	
Total 523 Funds Used :	\$351,060.00	EUs Earned :	3.96	Actual Cost Per Unit :	\$88,741.15	
Total Funds Used :	\$381,060.00	EUs Earned :	3.96	Actual Cost Per Unit :	\$96,324.57	
523 Balance:	-\$115,240.00	Other Balance :	-\$30,000.00	Net Balance :	-\$145,240.00	

Exhibit G - Lot Information Report

Lot Information Report										
As of : Oct 29, 2021										
		Eureka 12/2019-12/2021								
		Test Entity								
Lot #	Lot Status	Lot Description	Location	Borrower Assigned	Lot Area	Sale Price	Development Fees	Water	Sewer	
1510	Available	Lot 1 Block 4	128 Mars Drive, Alamosa, CO	Burkhardt, Nick	8500	\$47,000.00	\$5,000.00	Public Corp.	Public Corp.	
1512	Option to Purchase	Legal description	145 Fire Fly Lane, Alamosa, CO	Calvert, Rosalee,	900	\$46,000.00	\$1,800.00	Public Corp.	Public Corp.	
1504	Purchased	Legal description	185 Nebula Ave, Alamosa, CO	Carter, Jack,	900	\$46,000.00	\$6,000.00	Public Corp.	Public Corp.	
1509	Purchased	Legal	123 Mars Drive, Alamosa, CO	Kirk, James, T	0	\$49,000.00	\$4,000.00	Public Corp.	Public Corp.	
1513	Available		129 Fire Fly Lane, Alamosa, CO	O'Brien, Maggie,	0	\$,00	\$,00	Public Corp.	Public Corp.	
1511	Available			Rovaline, Aster,	0	\$,00	\$,00	Public Corp.	Public Corp.	
1506	Available	Legal	183 Nebula Ave, Alamosa, CO	Spock, John,	850	\$45,000.00	\$1,500.00	Public Corp.	Public Corp.	
1507	Option to Purchase	Legal - like lot & Block #'s	188 Nebula Ave, Alamosa, CO	Stark, Chloe,	910	\$48,000.00	\$1,800.00	Public Corp.	Public Corp.	
1508	Purchased	Legal	125 Mars Drive, Alamosa, CO	Steno, Jill,	940	\$47,000.00	\$4,000.00	Public Corp.	Public Corp.	
1502	Available	Full Legal Ex. Lot 10 Block 3 or NE1/4SW1/4, Sec.12, T27N R32E WM	125 Fire Fly Lane, Alamosa, CO	Wells, Helena, G	800	\$48,000.00	\$1,200.00	Public Corp.	Public Corp.	
1505	Available	Legal	157 Stargate Drive, Alamosa, CO	Wolverine, Hugh,	950	\$48,000.00	\$1,500.00	Public Corp.	Public Corp.	
1503	Available	Legal	127 Fire Fly Lane, Alamosa, CO		800	\$48,000.00	\$1,200.00	Public Corp.	Public Corp.	
1511	Available	Legal description	191 Nebula Dr, Alamosa, CO		940	\$46,000.00	\$1,800.00	Public Corp.	Public Corp.	
1513	Available	Legal Description	129 Fire Fly Lane, Alamosa, CO		10	\$72,000.00	\$1,500.00	Public Corp.	Public Corp.	
Total Number of Lots :	14	Lots Assigned to Borrowers :		Lots not Assigned to Borrowers :						
			3		11					

Exhibit H – Borrower Demographics Report

Borrower Demographic Report																		
As of: Oct 29, 2021																		
Eureka 12/2019-12/2021																		
Test Entity																		
Borrower	Borrower Group	Standing	Docket Status	Docket Status Date	Funding	Income	Occupation	Household Size	Type of Dwelling	Disabled	Extended Housing	Deficient Housing	502 Account	Congressional District	Ethnicity	Gender	Marital Status	Energy Efficiency Req.
Burdick, Nick, Carter, Jack,		New/Current	Closed	01/25/2020	Other	Low	Uber Driver	3	Rental	Yes	No	Yes	54330		Native American	Male	Unmarried	No
	Galaxy 1	New/Current	Closed	01/26/2020	502	Very Low	Taxi Driver	3	Living With Family		No	No	54328		Native American	Male	Unmarried	No
	Galaxy 1	New/Current	Withdrawn	02/03/2020	502	Low	Construction Worker	5	Manufacture d/Mobile	No	No	No	54324		Native American	Male	Married	No
	Galaxy 1	Released From Property	Withdrawn	02/16/2020	502	Low	Bookkeeper	3	Rental	No	No	No	54322		Asian/Pacific Islander	Female	Unmarried	No
	Galaxy 1	New/Current	Withdrawn	04/15/2020	502	Low	Occupational Therapist	3	Rental	No	No	No	54327		Black	Male	Unmarried	No
	Galaxy 1	New/Current	Closed	11/28/2019	502	Low	Data Entry Specialist	4	Living With Family	No	No	No	54326		Caucasian	Female	Separated	No
	Galaxy 1	New/Current	Closed	11/18/2019	502	Very Low	Dental Assistant	2	Living With Family		No	No	54323		Caucasian	Female	Unmarried	No
	Galaxy 1	New/Current	Closed	12/16/2019	502	Low	Sales	3	Rental		No	No	54321		Black	Male	Unmarried	No
	Galaxy 2	New/Current	Closed	04/16/2021	502	Low	Baggage Handler	4	Rental	Yes	No	No	54333		Black	Female	Separated	No
	Galaxy 2	Released From Property	Withdrawn	09/29/2021	502	Low	Sales	3	Rental	No	No	No	54331		Caucasian	Female	Married	No
Kovaline, Aster,	Galaxy 2	Released From Property	Withdrawn	06/15/2021	Other	Low	Sales	3	Rental	No	No	No	54334		Caucasian	Female	Unmarried	No
	Galaxy 2	New/Current	Closed	04/16/2021	502	Very Low	Sales	4	Rental		No	No	54330		Hispanic	Female	Unmarried	No
	Galaxy 2	Released From Property	Withdrawn	02/03/2020	Other	Low	Customer Service Rep	4	Rental	No	No	No	54329		Hispanic	Female	Married	No
		New/Current	Pending		Other	Low	Mechanic	4	Rental	No	No	Yes	54329		Black	Female	Married	No
		New/Current	Pending		Other	Low	Sales	3	Rental	Yes	No	No	54332		Native American	Female	Unmarried	No
		New/Current	Pending		Other	Low	Hair Dresser	2	Living With Family	No	No	Yes	54325		Native American	Female	Unmarried	No
	</																	

Exhibit I – Borrower Funds and Equity Report

Borrower Funds And Equity Report																	
As of: Oct 20 2021																	
Grant Name	Grantee Name	Borrower	Group	Lot Number	Address	Income	Household Size	Annual Income	Adjusted Income	Loan Limit	RD Loan	Other Leveraged Loan	Deferred Loan	Grants	Total Funding	Appraise d Value	Equity
Eureka 12/2019-12/2021	Test Entity	O'Brien, Maggie,	Galaxy 2	1513	125 Fire Fly Lane	Low	3	\$37,000.00	\$35,890.00	\$285,000.00	\$220,000.00	\$0.00	\$0.00	\$0.00	\$220,000.00	\$285,000.00	\$45,000.00
Eureka 12/2019-12/2021	Test Entity	Carter, Jack,	Galaxy 1	1504	185 Nebula Ave	Very Low	3	\$25,000.00	\$22,000.00	\$210,000.00	\$180,000.00	\$0.00	\$0.00	\$0.00	\$180,000.00	\$205,000.00	\$25,000.00
Eureka 12/2019-12/2021	Test Entity	Sywalker, Lilly,				Low	2	\$41,000.00	\$39,100.00	\$210,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Eureka 12/2019-12/2021	Test Entity	Mortenegro, Angela,				Low	3	\$45,300.00	\$43,900.00	\$210,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Eureka 12/2019-12/2021	Test Entity	Wolverine, Hugh,	Galaxy 1	1505	157 Scagatte Drive	Low	3	\$32,200.00	\$28,000.00	\$210,000.00	\$170,000.00	\$0.00	\$0.00	\$0.00	\$170,000.00	\$205,000.00	\$35,000.00
Eureka 12/2019-12/2021	Test Entity	Lea, Princess,	Galaxy 1			Low	3	\$29,900.00	\$26,800.00	\$210,000.00	\$185,000.00	\$0.00	\$0.00	\$0.00	\$185,000.00	\$0.00	\$0.00
Eureka 12/2019-12/2021	Test Entity	Kirk, James, T	Galaxy 1	1509	123 Mars Drive	Low	5	\$28,400.00	\$25,900.00	\$210,000.00	\$171,600.00	\$0.00	\$0.00	\$0.00	\$171,600.00	\$209,000.00	\$37,400.00
Eureka 12/2019-12/2021	Test Entity	Kirk, James, T	Galaxy 1	1509	123 Mars Drive	Low	5	\$28,400.00	\$25,900.00	\$210,000.00	\$171,600.00	\$0.00	\$0.00	\$0.00	\$171,600.00	\$0.00	\$0.00
Eureka 12/2019-12/2021	Test Entity	Stark, Chloe,	Galaxy 1	1507	188 Nebula Ave	Low	4	\$33,400.00	\$31,300.00	\$210,000.00	\$178,500.00	\$0.00	\$0.00	\$0.00	\$178,500.00	\$245,000.00	\$66,700.00
Eureka 12/2019-12/2021	Test Entity	Nelson, Judy,				Low	4	\$39,120.00	\$37,800.00	\$210,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Eureka 12/2019-12/2021	Test Entity	Burkhardt, Nick,		1510	128 Mars Drive	Low	3	\$36,520.00	\$35,100.00	\$210,000.00	\$0.00	\$187,000.00	\$0.00	\$0.00	\$187,000.00	\$0.00	\$0.00
Eureka 12/2019-12/2021	Test Entity	Calvert, Rosalee,	Galaxy 2	1512	145 Fire Fly Lane	Low	4	\$48,300.00	\$47,200.00	\$285,000.00	\$205,000.00	\$0.00	\$15,000.00	\$0.00	\$205,000.00	\$267,000.00	\$62,000.00
Eureka 12/2019-12/2021	Test Entity	Blake, Alison,				Low	4	\$55,100.00	\$53,200.00	\$210,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Eureka 12/2019-12/2021	Test Entity	Rovaline, Aster,	Galaxy 2	1511		Low	3	\$38,200.00	\$36,890.00	\$285,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Eureka 12/2019-12/2021	Test Entity	Wells, Helena, G	Galaxy 1	1502	125 Fire Fly Lane	Very Low	2	\$25,200.00	\$23,500.00	\$210,000.00	\$135,000.00	\$5,000.00	\$5,000.00	\$5,000.00	\$165,000.00	\$212,000.00	\$47,000.00
Eureka 12/2019-12/2021	Test Entity	Stero, Jill,	Galaxy 2	1508	125 Mars Drive	Very Low	4	\$38,000.00	\$37,100.00	\$215,000.00	\$200,000.00	\$0.00	\$0.00	\$0.00	\$200,000.00	\$260,000.00	\$50,000.00
Eureka 12/2019-12/2021	Test Entity	Spock, John,	Galaxy 1	1506	183 Nebula Ave	Low	3	\$34,600.00	\$32,200.00	\$210,000.00	\$170,000.00	\$0.00	\$0.00	\$0.00	\$170,000.00	\$209,000.00	\$40,000.00
Total Families:	17																
Total Families with Approved Loans	12																
Total Families with Pending Loans	5																

Exhibit J - Grant Construction Report

Grant Construction Report											
As of : Oct 29, 2021											
Grant Name	Grantee	Borrower	Group	Lot	Pledged Points	Construction Date	Construction End Date	Months Elapsed	Tasks Completed	Construction Points	Total EUs
Eureka 12/2019-12/2021	Test Entity	Burkhardt, Nick,		1510	0					0	0.2
Eureka 12/2019-12/2021	Test Entity	Carter, Jack,	Galaxy 1	1504	66	02/27/2020	11/20/2020	9	27	100	1.0
Eureka 12/2019-12/2021	Test Entity	Kirk, James , T	Galaxy 1	1509	0					0	0.0
Eureka 12/2019-12/2021	Test Entity	Kirk, James , T	Galaxy 1	1509	0					0	0.0
Eureka 12/2019-12/2021	Test Entity	Leia, Princess,	Galaxy 1	0						0	0.0
Eureka 12/2019-12/2021	Test Entity	Spock, John,	Galaxy 1	1506	72	02/20/2020	11/03/2020	8	24	95	0.76
Eureka 12/2019-12/2021	Test Entity	Stark, Chloe,	Galaxy 1	1507	0	01/15/2020	01/19/2020		1	3	0.224
Eureka 12/2019-12/2021	Test Entity	Wells, Helena, G	Galaxy 1	1502	74	11/10/2020	01/10/2020	-10	1	3	0.224
Eureka 12/2019-12/2021	Test Entity	Wolverine, Hugh,	Galaxy 1	1505	73	01/07/2020	11/17/2020	10	27	100	1.0
Eureka 12/2019-12/2021	Test Entity	Calvert, Rosalee,	Galaxy 2	1512	30	06/03/2021	06/10/2021		1	3	0.224
Eureka 12/2019-12/2021	Test Entity	OBrien, Maggie,	Galaxy 2	1513	17					0	0.0
Eureka 12/2019-12/2021	Test Entity	Rovaline, Aster,	Galaxy 2	1511	0					0	0.0
Eureka 12/2019-12/2021	Test Entity	Steno, Jill,	Galaxy 2	1508	17	05/30/2021	06/02/2021		1	3	0.224
Eureka 12/2019-12/2021	Test Entity	Blake, Allison,		0						0	0.0
Eureka 12/2019-12/2021	Test Entity	Jetson, Judy,		0						0	0.0
Eureka 12/2019-12/2021	Test Entity	Montenegro, Angela,		0						0	0.1
Eureka 12/2019-12/2021	Test Entity	Skywalker, Lilly,		0						0	0.0
										Total EUs :	3.9560000000000001

Exhibit K – Construction Task Matrix for All Families Report

Construction Task Matrix for all Families												
As of:												
Oct												
29/2021												
Grant Name :Eureka 12/2019-12/2021												
Grantee : Test Entity												
Construction Type :With Slab												
Item	Construction Task	Points	Carter, Jack,	Kirk, James, T	Spock, John,	Stark, Chloe,	Wells, Helena, G	Wolverine, Hugh,	Calvert, Rosalee,	O'Brien, Maggie,	Steno, Jill,	
1	Excavation	3	3/2020		2/2020	1/2020	1/2020	1/2020	6/2021		6/2021	
2	Footing, Foundations, columns	8	3/2020		3/2020			1/2020				
3	Floor slab or framing	6	3/2020		3/2020			1/2020				
4	Subflooring	0	3/2020		4/2020			2/2020				
5	Wall framing sheathing	7	4/2020		4/2020			2/2020				
6	Roof and ceiling framing, sheathing	6	5/2020		4/2020			3/2020				
7	Roofing	5	5/2020		5/2020			3/2020				
8	Siding, exterior trim, porches	8	6/2020		5/2020			4/2020				
9	Windows and exterior doors	9	7/2020		6/2020			5/2020				
10	Plumbing - roughed in	3	9/2020		6/2020			6/2020				
11	Sewage disposal	1	9/2020		7/2020			7/2020				
12	Heating - roughed in	1	9/2020		7/2020			7/2020				
13	Electrical - roughed in	2	10/2020		7/2020			7/2020				
14	Insulation	2	7/2020		7/2020			7/2020				
15	Dry wall	8	7/2020		8/2020			8/2020				
16	Basement or porch floor, steps	1	9/2020		8/2020			8/2020				
17	Heating - finished	3	8/2020		9/2020			9/2020				
18	Flooring covering	6	9/2020		9/2020			9/2020				
19	Interior carpentry, trim, doors	6	9/2020		9/2020			9/2020				
20	Cabinets and counter tops	1	9/2020		9/2020			10/2020				
21	Interior painting	4	8/2020		10/2020			10/2020				
22	Exterior painting	1	10/2020					10/2020				
23	Plumbing - complete fixtures	4	10/2020		10/2020			10/2020				
24	Electrical - complete fixtures	1	10/2020		10/2020			10/2020				
25	Finish hardware	1	11/2020		11/2020			11/2020				
26	Gutters and downspouts	1	10/2020					11/2020				
27	Grading, paving, landscaping	3	11/2020					11/2020				

Exhibit L – SHARES Report

As of : Oct 29, 2021		Quarterly Evaluation Report for Self-Help Technical Assistance Grants Evaluation for period starting 07/01/2021 to 09/30/2021	
1.	a. Name of Grantee :	Test Entity	
	b. Address :	12345 West Main, Hometown, MO 63026	
2.	a. Grant Name :	Eureka 12/2019-12/2021	
	b. Duration :	36 months	
	c. Counties Served :	Alamosa	
	d. Grant Start Date :	12/20/2019	Grant Extension Date : 12/19/2022
	e. Grant End Date :	12/19/2021	
3.		Actual	Planned
	a. Total EUs for this period:	0.000	1.995
	b. Total EUs for this grant-to-date:	3.956	14.225
	c. Preconstruction EUs for this period for loans that are pending:	0	
	d. Preconstruction EUs for grant-to-date loans that are pending:	0.1	
	e. Total EUs for month 1 of this quarter :	0.0	
	f. Total EUs for month 2 of this quarter :	0.0	
	g. Total EUs for month 3 of this quarter :	0.0	
4.	a. Total number of houses for each method of construction:		
	Stick	7	
	b. Average statistics for all houses constructed under this grant:		
	Living Area :	1544	
	Bedrooms :	3	
	Bathrooms :	2	
	c. Household size of families in this grant:		
	2 persons :	1	
	3 persons :	3	
	4 persons :	3	
5.	a. Number of houses proposed under this grant:	24	
	b. Number of houses completed under this grant :	2	
	c. Number of houses currently under construction :	5	
	d. Number of families in preconstruction :	1	
	e. Number of families contacted :	6	
	f. Number of low-income families :	3	
	g. Number of very-low-income families :	3	
	h. Number of construction supervisors:	2	
	i. Number of TA Employees :	8	
	j. Average Appraisal Value of units for this grant :	\$230,777.78	
	k. Average Loan Amount for this grant :	\$185,544.44	
6.	a. Average days needed to construct a house under this grant :	291 days	
	b. Number of days between submission of self-help borrower's docket and approval/rejection :	24	
	c. Total number of loan dockets approved or rejected :	13	
	d. Total number of Loan docket rejections for grant-to-date :	0	
	Percentage of loan docket rejections for grant-to-date :	0.00	

7.	a. Did any of the following adversely affect the Grantee's ability to accomplish program objectives ? 1.TA Staff turnover Yes 2.RD Staff turnover No 3.Bad weather No 4.Loan processing delays Yes 5.Site acquisition and development No 6.Unavailable loan/grant funds No 7.Lack of participants Yes 8.Communication between RD/Grantee No 9.Other Problems or Comments Yes
	b. Comments Lack of participants There has been a severe slow down of applicants in our area. Will need to try some new types of marketing.
	b. Comments Loan processing delays Due to staff changes at the local RD office there have been processing delays on SH Loans.
	b. Comments Other Problems or Comments We have had to close the jobsite for two weeks due to possible exposure to COVID
	b. Comments TA Staff turnover We have been assigned a new TA provider in August.
	Certified By _____ Title : _____ Date : _____

Exhibit M – SHARES – Access Instructions for Grantees-TRC

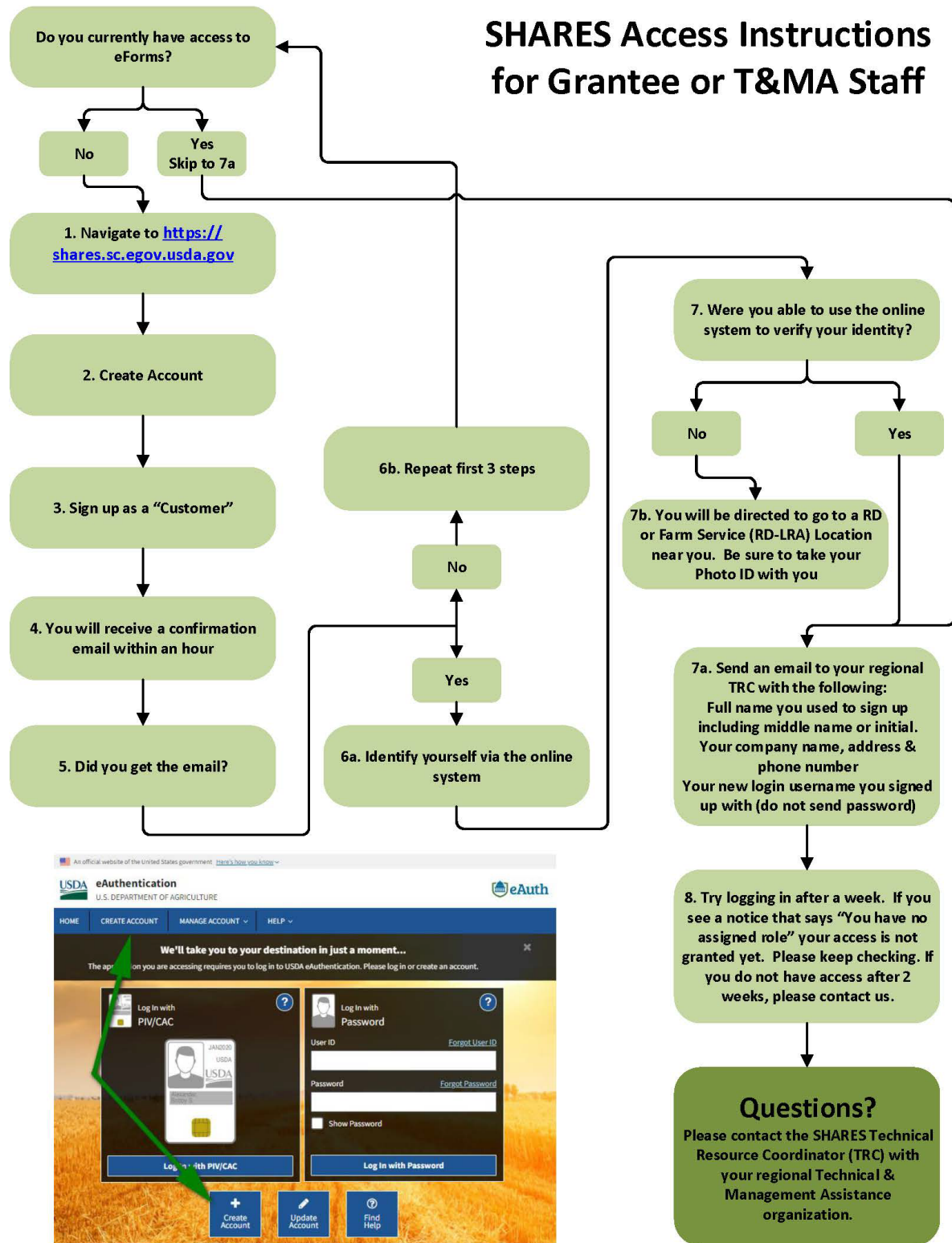


Exhibit N – SHARES – Borrower Dates & Construction Tabs-TRC

SHARES

Borrower Dates Tab & Construction Tab

Borrower

Borrower Dates Borrower Funds Lot House Construction Grant Comments

Save Cancel

Last Name: Wells First Name: Helena
 Standing: New/Current RD Borrower Id: 54323
 Group: Galaxy 1 Grant Name: Eureka 12/2019-12/2021

Milestone Dates

Initial Contact Date: 10/29/2019
 Package Submitted to RD Date: 10/31/2020
 Application Completed Date: 11/02/2019
 Approved Date: 11/18/2019
 Preconstruction Conference Date: 02/06/2020
 Date Under Construction: 02/15/2020
 Application Withdrawn Date:
 Application Received Date: 10/31/2020
 Date of Pre-Qualification: 10/31/2020
 Eligibility Determined Date: 11/15/2019
 Loan Closed Date: 02/06/2020
 Construction Docket Submitted Date:
 Final Inspection Date:
 Application Rejection Date:

Fields with Green Arrows are required. All other fields should be filled out as well, but they are not required. (See green description below)

- **Initial contact** = original contact with potential applicant.
- **Application received** = refers to the PRE-QUAL application. This is the minimum info needed to determine if they are within income and debt ranges and will determine if you continue with the applicant.
- **Package Submitted to RD Date** = This date is for the PRE-QUAL NOT the full application (Many RD offices no longer use this)
- **Date of Pre-Qualification** = If a PRE-Qual went to RD, this is the date RD has pre-qualified the applicant. (Many RD offices no longer do this)
- **Application Completed Date** = Date the full application was sent to RD
- **Eligibility Determined** = Date RD issues the Letter of Eligibility
- **Approved Date** = Date appraisal packet was submitted to RD.
- **Loan Closed Date** = Date that the mortgage and deed are recorded and loan closing happens.
- **Preconstruction Conference Date** = This conference could be held by the organization or RD or a combination of both.
- **Construction Docket Submitted Date** = RD date - You do not need to enter this
- **Date Under Construction** = This will autofill based on the Start date of the first task on the Construction Tab.

Exhibit O – SHARES – Adding Extensions and Supplementals-TRC

Adding Extensions and Supplementals in SHARES

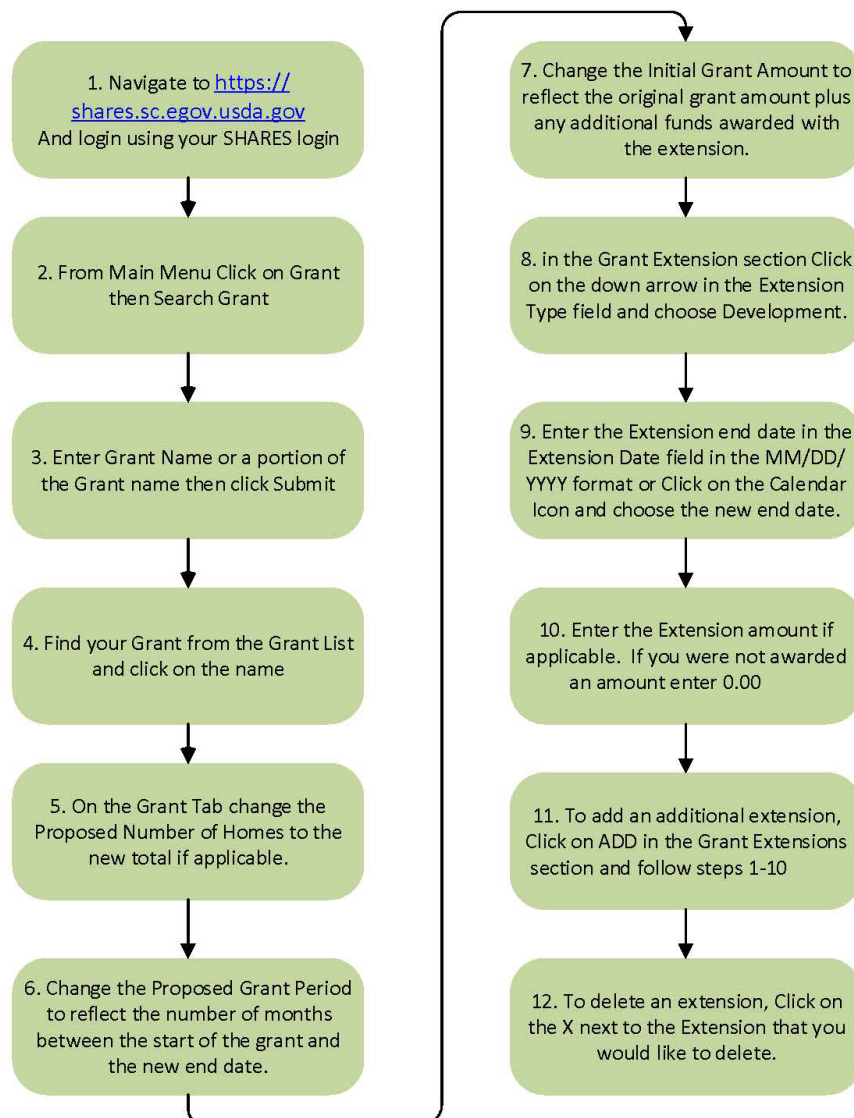


Exhibit P - SHARES - Group Name Key Based on Status

SHARES Group Name Key Based on Status

Group Name/Status	Description
Inquiry	They have given their information and inquired about the program.
Pre-qual	They have started the prequalification process with Grantee.
Processing	The Grantee has started processing the full application.
RD	The application has been sent to RD for processing.
Withdrawn/Rejected	The applicant has withdrawn, is no longer interested in the program or has received a rejection notice.
Eligible	They have received a letter of eligibility but have not been assigned to a group.
Group Name	They have received a letter of eligibility and have been assigned to a group.

Type the Group Name/Status in the Group field on Borrower Tab in SHARES to ensure that they sort properly in the Grant Construction Report. (See screen print below)

It is recommended that all inquiries, even if they do not start the program, are entered into SHARES as contacts for the program. This is the best way to show USDA RD how many applicants you go through to process one eligible application. It is also a good indicator of how well you are following your Affirmative Fair Housing Marketing Plan and if you need to update or change your marketing strategies.

****Important to Note:** There is minimal time investment and information needed to ensure that all contacts are entered into SHARES. (See highlighted yellow areas for required information)

Borrower

Borrower

Dates

Borrower Funds

Lot

House

Construction

Grant

Comments

Last Name: * Calvert

Standing: * New/Current

Group: Inquiry

First Name: * Rosalee

RD Borrower Id: 54333

Grant Name: * Eureka 12/2019-12/2021

Date of Birth: 08/03/1982

Gender: Female

Ethnicity: Black

Occupation: Baggage Handler

Annual Adjusted Income: \$47,200.00

Household Size: * 4

Disabled: Yes ☐ No ☒

Deficient Housing: Yes ☐ No ☒

Energy Efficiency Required: Yes ☐ No ☒

Primary Funding Source: * 502

Income Level: * Low Income

Marital Status: Separated

Annual Income: \$48,300.00

Dependents: 3

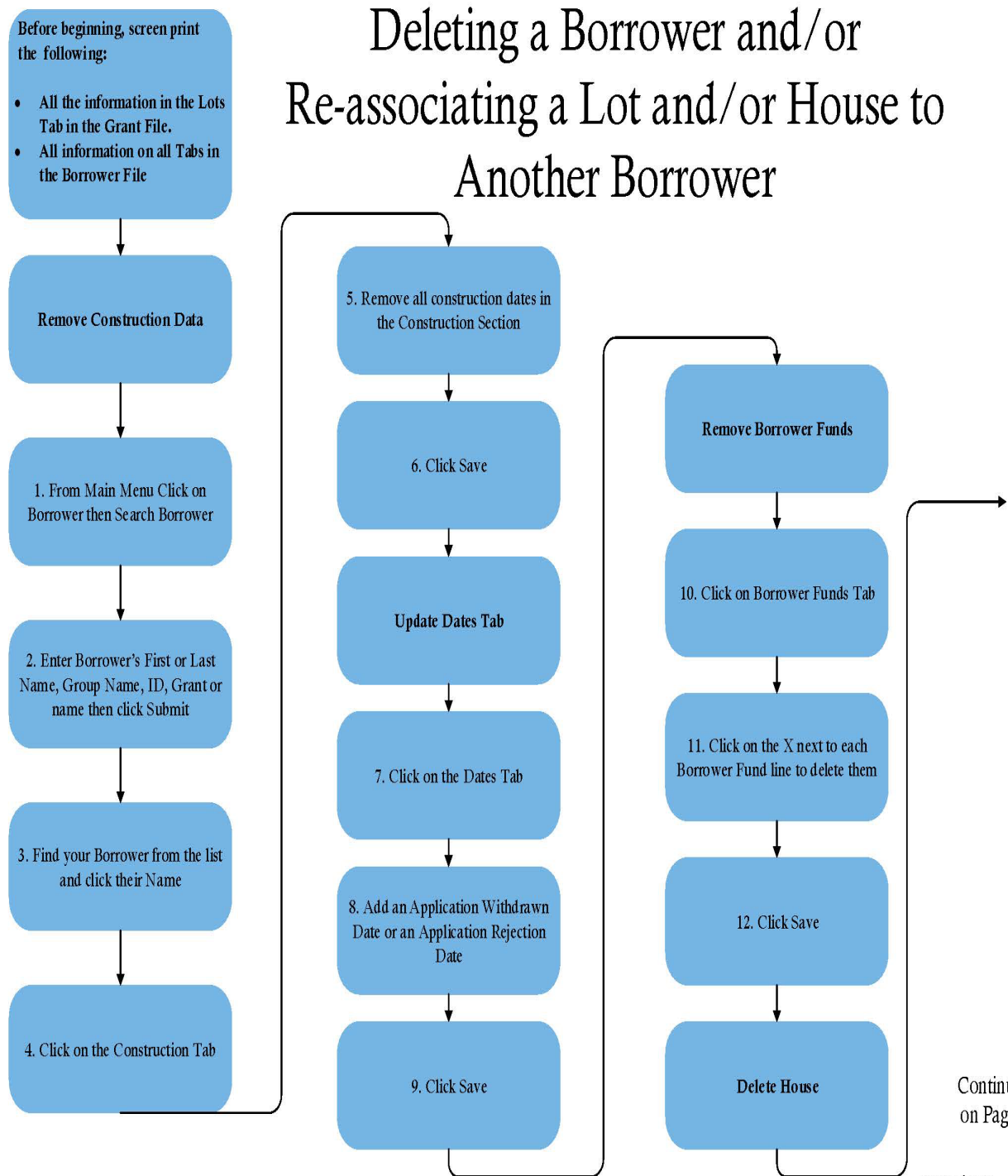
Type of Dwelling: Rental

Extended Family: Yes ☐ No ☒

RD Area Loan Limit: \$285,000.00

Loan Amount: \$220,000.00

Exhibit Q - SHARES - Deleting or Re-associating a Borrower-TRC



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