



# **SHARES Handbook**

**Self-Help Automated Reporting and Evaluation System**

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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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<b>Region I</b>		<b>Region II</b>	
Florida Non-Profit Housing, Inc.		LIFT Community Action Agency, Inc.	
P.O. Box 1987		209 North 4 <sup>th</sup> Street	
Sebring, Florida 33871-1987		Hugo, Oklahoma 74743	
(863) 385-2519		(580) 326-5165	
<a href="mailto:trogers@fnph.org">trogers@fnph.org</a>		<a href="mailto:owyne.gardner@liftca.org">owyne.gardner@liftca.org</a>	
<b>Region III</b>		<b>Region IV</b>	
NeighborGood Partners		Rural Community Assistance Corporation	
363 Saulsbury Rd.		3120 Freeboard Drive, Suite 201	
Dover, Delaware 19904		West Sacramento, California 95619	
(302) 678-9400		(916) 447-2854	
<a href="http://www.neighborgoodpartners.org">www.neighborgoodpartners.org</a>		<a href="http://www.rcac.org">www.rcac.org</a>	

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## INTRODUCTION

### THE SELF HELP 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 originally began as the Mutual Self-Help 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 the end of the grant, at least 40% of the total participants served should be in the very low-income category. The balance of the 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 the skilled staff, a group of generally 4 to 10 households is formed. 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 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.

### Acquisition Rehabilitation and Owner/Occupied Rehabilitation

With the assistance of skilled staff, an applicant repairs a home that they purchase or one in which they already reside. The participant applies for a loan and/or grant and once qualified, they enter into a contract to purchase a property or in the case of owner/occupied, provide proof of ownership. 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, the 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, technical assistance, and funding.

Rural Development has been providing funds for the self-help housing program since the late 1960s. They provide Section 523 self-help 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/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 four levels: national, state, area and 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 and interacts with Congress for legislation, development and program funding. 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

The State Office has the approval authority over smaller Section 523 Self-Help grant applications up to \$300,000. Section 502 home loan funds are allocated on a state-by-state basis and the State Office distributes the 502 funds based on a state RD formula that is released annually via a funding policy memorandum. 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 – 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 Office

The Rural Development Area Director is typically responsible for the Section 523 grant. In some states however, the grant monitoring has been retained at the State Office level with the Single Family Housing Program Director or it has been assigned to the 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.

### Rural Development Local Office

Within this office, 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.

### **THE RURAL DEVELOPMENT SECTION 502 SINGLE FAMILY DIRECT HOME LOAN**

Many 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 credit 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 Rural Development local offices or online at [www.rd.usda.gov](http://www.rd.usda.gov).

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.

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 home 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.

## **THE 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 very-low-income homeowners to remove health and safety hazards. The maximum loan is \$40,000 and the maximum grant amount is \$10,000. Grants can only be given to elderly households (62 or older). This funding could be used with the repair or rehab program, or other funding could be sought.

## **THE 523 MUTUAL SELF-HELP HOUSING TECHNICAL ASSISTANCE GRANT**

For organizations to operate a self-help housing program, Rural Development provides grant funds to operate and oversee the program. Each technical assistance (TA) grant is usually for a period of up to two years, and is available to public and private 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 new home financed under the 502 program in their area, for every home they are planning to build. Check with your Contractor for other methods of determining grants 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; obtaining or creating Rural Development-approved house plans and helping 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 OMB Circular 2 CFR 200 subpart f.

## 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, 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, 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 GUIDES AND 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.

- Orientation Handbook
- Feasibility Handbook
- Board of Directors Handbook
- Program Director Handbook
- Construction Supervisor Handbook
- Group Coordinator Handbook
- Financial Management Handbook for Federally Funded Organizations
- Accounting for Individual Family 502 Loan Accounts Handbook
- 502 Loan Processing Guidebook
- Preconstruction Meetings Handbook
- SHARES Handbook
- Acquisition and Owner-Occupied Rehab Handbook
- Section 523 Technical Assistance Grant Application 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.

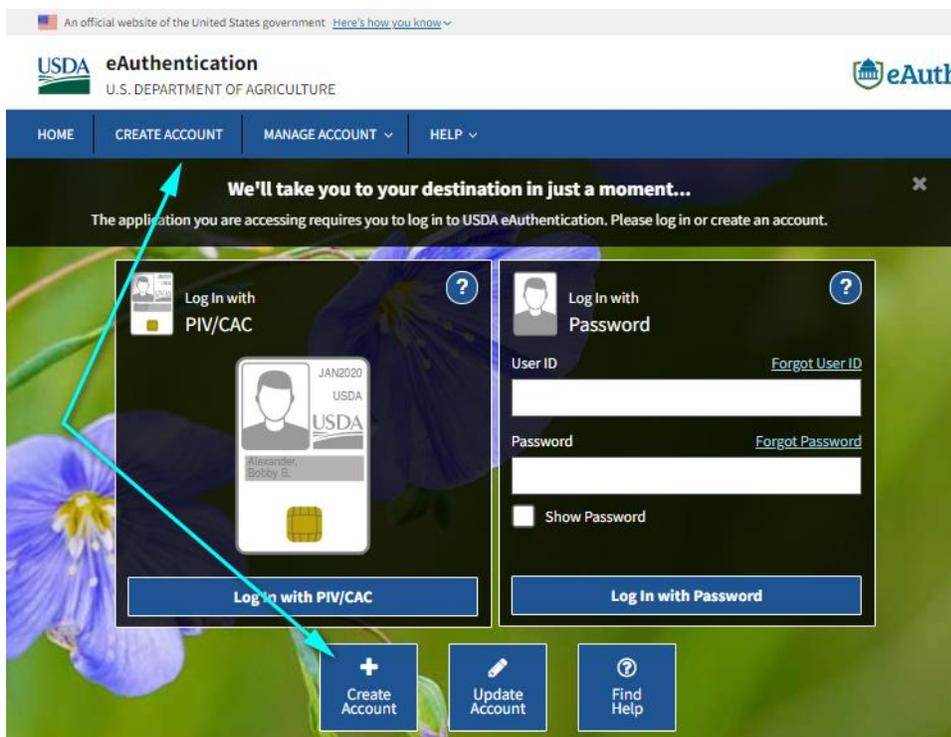
### HOW TO REQUEST ACCESS TO SHARES

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

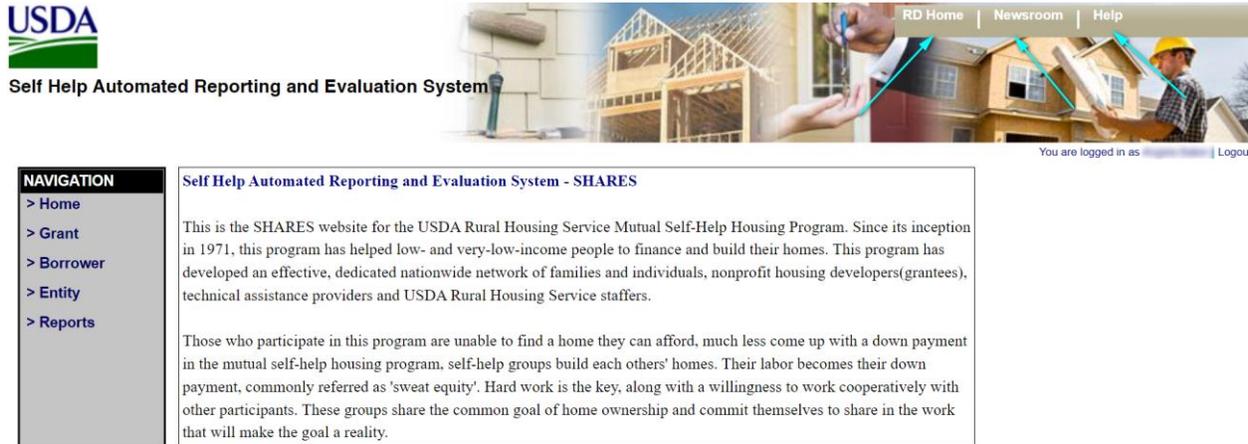
**Submit**

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

## Borrower Module (File)

Screen/Tab Title	Description
<b>Borrower Search Submenu</b>	Search for Borrowers based on various Search criteria.
<b>Borrower Add Submenu</b>	Add a new Borrower to the system.
<b>Borrower List Screen</b>	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.
<b>Borrower Tab</b>	Enter new Borrower information or update a searched Borrower's information.
<b>Dates Tab</b>	Enter, update, and delete pre-construction dates related to the Borrower's application and loan process.
<b>Borrower Funds Tab</b>	Enter, update, and delete funds related to the Borrower.
<b>Lot Tabs</b>	Lists lot and address information related to a Borrower's lot and allows the user to assign an existing lot to the borrower.
<b>House Tab</b>	View, enter, and update house information related to the borrower.
<b>Construction Tab</b>	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.)
<b>Grant Tab (Read-Only)</b>	Displays the same information as the Grant Tab in the Grant File for read only.
<b>Comments Tab</b>	Enter, update, and delete Comments related to the Borrower for internal purposes.

## Entity Module

Screen/Tab Title	Description
<b>Entity Search</b>	Search for Entities based on various Search criteria.
<b>Entity List</b>	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.
<b>Entity</b>	Enter and update details related to the Entity.
<b>Entity Address</b>	Enter, update, and delete an Entity's addresses.
<b>Entity Contacts</b>	Add, update, or delete an Entity's contact information.
<b>Entity Individuals</b>	Add, update, or delete an Entity's key personnel and roles.
<b>Entity Comments</b>	Enter, update, or delete Comments related to an Entity.

## Reports Module

Report	Description
<b>List of Self-Help Contractors and Grantees</b>	Contact information for all Grantees in the system as well as all T&MA Providers in the country.
<b>List of Grant Records in SHARES</b>	Full list of every grant start and end dates and the proposed homes under each grant.
<b>Average Housing Statistics for Each Grant</b>	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.
<b>Average Unit Cost for Each Grant</b>	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.
<b>502 Loans Funded for All Grants in Selected Periods</b>	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.
<b>Grant Funds Report</b>	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.
<b>Lot Information Report</b>	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.
<b>Borrower Demographics Report</b>	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.
<b>Borrower Fund and Equity Matrix</b>	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.
<b>Grant Construction Report</b>	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.
<b>Construction Task Matrix for All Families</b>	Lists end dates for completion of each of the 27 tasks for all borrowers currently building.
<b>SHARES Report</b>	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.

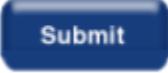
## SCREEN CONTROLS

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.
<a href="#">Borrower Search</a>   <a href="#">Borrower List</a>   <a href="#">Borrower</a> (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 successfully 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 a 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**

Cancel

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: \* Test Entity Entity Type: \* Grantee

Status: \* Active Region: West

### 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.

### 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.

*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
<b>Entity Name:</b> Test Entity		<b>Entity Type:</b> Grantee	
<b>Status:</b> Active		<b>Region:</b> 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
<b>Add</b>			

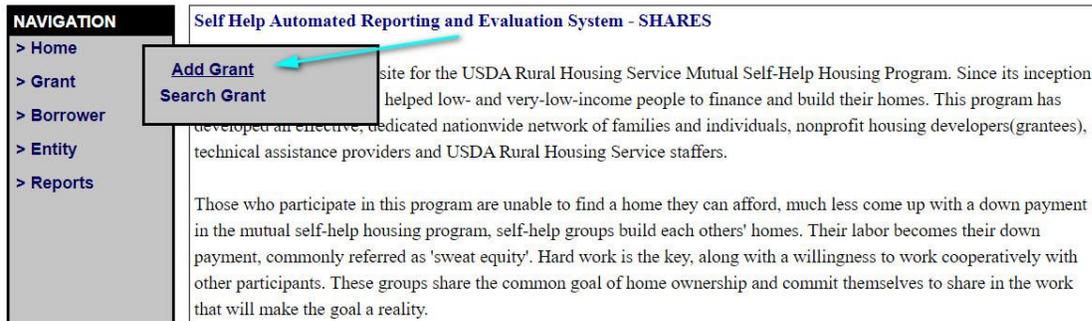
*Important Note – It is important to ensure your organization’s staff information is up to date.*

## 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.  
Proposed Grant Amount: Rural Community Assistance Corporation

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: [ ]

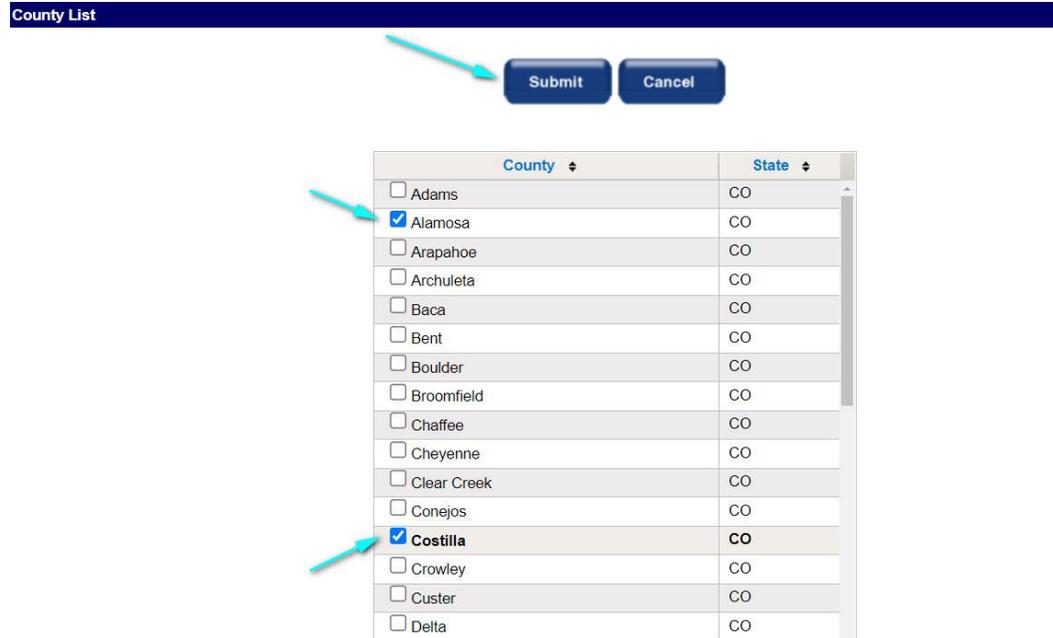
Submit Cancel

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.



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.

Funds Used			
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
<b>Total 523</b>			\$48,400.00
<b>Total Other</b>			\$4,000.00
<b>Total</b>			\$52,400.00

**Add**

- Next, move to the Funds Received section
  - o Click the drop-down menu under Source to choose either 523 Grant or Other as the source funds.
  - o Enter a description of the funds that were received. This would generally be the draw number and group number it is covering.
  - o Click on the Calendar Icon to choose the correct date for the funds used through.
  - o 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 *
<input checked="" type="checkbox"/> 523 Grant	Draw 3 - Group 1 & 2	05/31/2021	\$16,700.00
<input checked="" type="checkbox"/> Other	Fundraising	05/31/2021	\$4,000.00
<input checked="" type="checkbox"/> 523 Grant	Draw 1 - Group 1	04/30/2021	\$16,700.00
<input checked="" type="checkbox"/> 523 Grant	Draw 2 - Group 1	04/30/2021	\$15,000.00
<b>Total 523</b>			\$48,400.00
<b>Total Other</b>			\$4,000.00
<b>Total</b>			\$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      **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

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**

Office Name:

Office Type:

State:

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
<input checked="" type="checkbox"/> Colorado State Office	State	CO
<input checked="" type="checkbox"/> Alamosa Field Office	Field	CO
<input type="checkbox"/> COFFEE Field Office	Field	CO
<input type="checkbox"/> Cortez Field Office	Field	CO
<input type="checkbox"/> Craig Field Office	Field	CO
<input type="checkbox"/> Delta Field Office	Field	CO
<input type="checkbox"/> Las Animas Field Office	Field	CO
<input checked="" type="checkbox"/> 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

<input checked="" type="checkbox"/> Colorado State Office	State	<input checked="" type="radio"/>
<input checked="" type="checkbox"/> Alamosa Field Office	Field	<input type="radio"/>

### Reviews Tab

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

**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.*

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
<b>Lot Number</b>	Designated number that the Grantee uses to describe a lot.
<b>Lot Description</b>	Legal Description of the lot. Ex. Lot 9, Block 58, Lake Manor Section.
<b>Lot Parcel Number</b>	County Tax Property ID for the Parcel (if available).
<b>Lot Size</b>	Acres or Square Footage of the property. Click appropriate radio button for Acres or Square Feet.
<b>Sale Price</b>	Total price the Borrower will be charged.
<b>Development Fees</b>	Total fees the Grantee or developer is charging for the lot.
<b>Water</b>	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.
<b>Sewer</b>	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.
<b>Sold Lot</b>	Was the lot sold by the grantee to the borrower? Click on Radio Button and choose appropriate choice of Yes or No
<b>Lot Acquired by 2<sup>nd</sup> Borrower</b>	Was the lot let go and given to another Borrower? Choose the appropriate Radio Button of Yes or No.
<b>Acquisition Cost</b>	Cost for the Grantee to acquire the lot.
<b>Lot Status</b>	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: <a href="https://www.house.gov/representatives/find-your-representative">https://www.house.gov/representatives/find-your-representative</a>

**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:       RD Borrower Id:    
 Standing:       Group:

**Lot**

Lot Number: \*       Lot Description:   
 Lot Parcel Number:       Lot Size:   Acres  Square Feet  
 Sale Price:       Development Fees:   
 Water: \*       Sewer: \*   
 Sold Lot:  Yes  No      Lot Acquired by 2nd Borrower:  Yes  No  
 Acquisition Cost:       Lot Status: \*

**Lot Location**

Address Line 1:       Address Line 2:   
 City:   
 State:          
 Zip Code:      County:   
 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 **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
<input checked="" type="checkbox"/> 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
<input checked="" type="checkbox"/> 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.
<input checked="" type="checkbox"/> 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.
<input checked="" type="checkbox"/> 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 **Grantee Name:** Test Entity  
**Status:** Current Grant **State:** CO  
**Start Date:** 03/31/2021 **End Date:** 03/30/2023

Performance Metrics  Borrower Metrics

**Cost Per Approved Unit**

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

**Actual Cost Per Unit - Original Grant Period**

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

**Actual Cost Per Unit - With Grant Extension Period**

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

**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

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.

**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

**Comments**

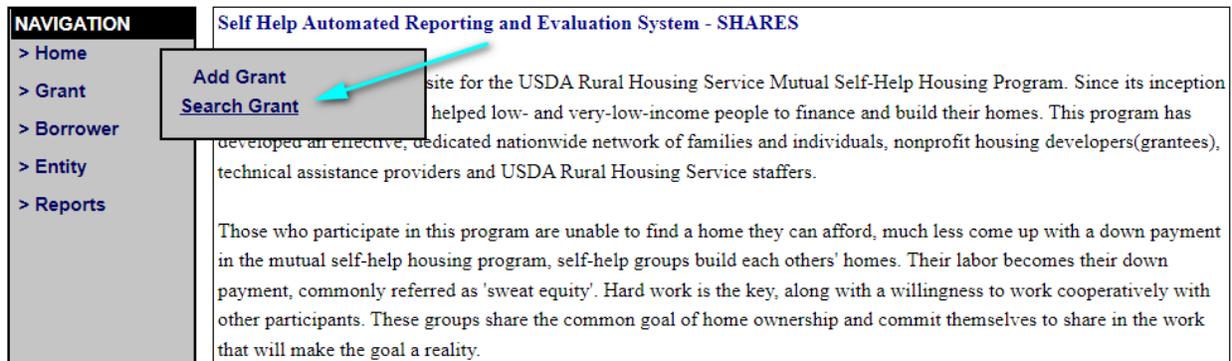
Entered By	Organization	Date *	Comment *
Angela Baker	Rural Community Assistance Cor	09/29/2021	Justine will be out on leave for two weeks. During this time Allan will be filling in from 10/01/2021-10/28/2021.

**Add**

## 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 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: 24  
Pre-Dev Start Date: Application Date: 11/15/2019  
Pre-Application Date: Grant Start Date: 12/20/2019 Grant End Date: 12/19/2021  
Initial Grant Amount: \$936,000.00 Construction Supervisors: 2  
Number of TA Staff: 8

**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 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: Application Date: 11/15/2019  
Pre-Application Date: 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 *
X Development	12/19/2022	\$200,000.00

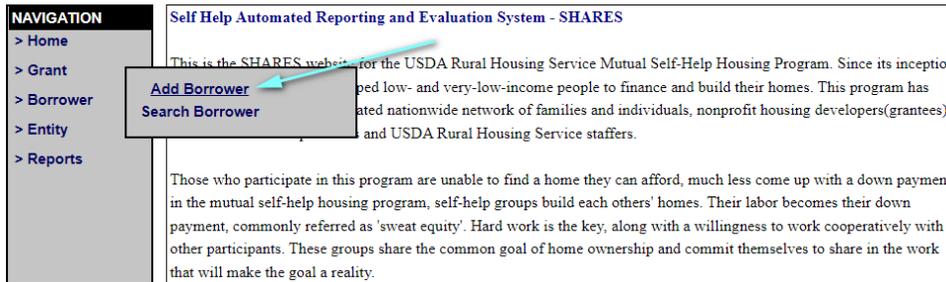
Add

## 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
<b>Last Name</b>	Last Name of the Primary Borrower
<b>First Name</b>	First Name of the Primary Borrower
<b>Middle Name</b>	Middle Name of the Primary Borrower
<b>Standing</b>	Current Standing of Primary Borrower: New/Current, Assumed Existing Loan, Released from Property, Property Foreclosed
<b>RD Borrower ID</b>	Borrower’s loan account number from Rural Development (can be

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

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

<p><b>Last Name:</b> Yoda</p> <p><b>Standing:</b> New/Current</p> <p><b>Group:</b> Galaxy 3</p>	<p><b>First Name:</b> Grogu</p> <p><b>RD Borrower Id:</b> 55123</p> <p><b>Grant Name:</b> Eureka 03/2021 - 03/2023</p>
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Milestone Dates

<p><b>Initial Contact Date:</b> <input style="width: 100%;" type="text" value="04/01/2021"/></p> <p><b>Package Submitted to RD Date:</b> <input style="width: 100%;" type="text"/></p> <p><b>Application Completed Date:</b> <input style="width: 100%;" type="text" value="04/30/2021"/></p> <p><b>Approved Date:</b> <input style="width: 100%;" type="text" value="05/14/2021"/></p> <p><b>Preconstruction Conference Date:</b> <input style="width: 100%;" type="text"/></p> <p><b>Date Under Construction:</b> <input style="width: 100%;" type="text" value="06/03/2021"/></p> <p><b>Application Withdrawn Date:</b> <input style="width: 100%;" type="text"/></p>	<p><b>Application Received Date:</b> <input style="width: 100%;" type="text" value="04/01/2021"/></p> <p><b>Date of Pre-Qualification:</b> <input style="width: 100%;" type="text"/></p> <p><b>Eligibility Determined Date:</b> <input style="width: 100%;" type="text" value="05/14/2021"/></p> <p><b>Loan Closed Date:</b> <input style="width: 100%;" type="text" value="05/29/2021"/></p> <p><b>Construction Docket Submitted Date:</b> <input style="width: 100%;" type="text" value="05/28/2021"/></p> <p><b>Final Inspection Date:</b> <input style="width: 100%;" type="text"/></p> <p><b>Application Rejection Date:</b> <input style="width: 100%;" type="text"/></p>
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Milestone Dates	Date Description
<b>Initial Contact</b>	Original contact with potential applicant.
<b>Application Received</b>	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.
<b>Package Submitted to RD Date</b>	The date the full pre-qualification application is submitted to RD.
<b>Date of Pre-Qualification</b>	The date RD pre-qualified the applicant.
<b>Application Completed Date</b>	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).
<b>Eligibility Determined</b>	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).
<b>Approved Date</b>	Date appraisal packet was submitted to RD. (Date auto populates the Pre-Construction Phase II Actual Start date in the Construction Tab).
<b>Loan Closed Date</b>	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).
<b>Preconstruction Conference Date</b>	Date that the initial Pre-Construction Conference was held with all families (borrowers and their families) in the group.
<b>Construction Docket Submitted Date</b>	Date that RD submits the construction docket.
<b>Date Under Construction</b>	Automatically populates from the Start Date entered in the first task in the Construction section of the Construction Tab.
<b>Final Inspection date</b>	Date that construction ended for the entire group.
<b>Application Withdrawn Date</b>	Date that the borrower is withdrawn from the program.
<b>Application Rejection Date</b>	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 *
<input checked="" type="checkbox"/> RD Loan	502 Single Family Loan	USDA Rural Development	06/28/2021	\$200,000.00
<input checked="" type="checkbox"/> Grant	SHOP Funds	Tiera del Sol Enterprises	06/28/2021	\$15,000.00
<b>Total Amount</b>				\$215,000.00

Add

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

Borrower Sources	Field Description
<b>502 Single Family Loan</b>	USDA RD Single Family 502 Direct Loan.
<b>State Financing</b>	State Housing Authority or specified State Funds through other State agencies.
<b>Private Financing</b>	Grantee loan funds, Bank Funds, CDFI Down Payment Assistance.
<b>Other Federal Financing</b>	Federal Home Loan Bank AHP Funds through dispersing agencies.
<b>Other Public Financing</b>	Town or City Financing, Town and City or County Housing Authority Financing.
<b>Home Funds</b>	HUD Financing and Down Payment Assistance through dispersing agencies.
<b>SHOP Funds</b>	SHOP Funds.
<b>CDBG</b>	Community Development Block Grant Funds through dispersing agencies.
<b>Fannie Mae</b>	Fannie Mae through partners dependent on state.
<b>Unknown</b>	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 First Name: Grogu  
 Standing: New/Current RD Borrower Id: 55123  
 Group: Galaxy 3 Grant Name: Eureka 03/2021 - 03/2023

**Lot**

Lot Number: \*  Lot Description:   
 Lot Parcel Number: 15 Lot Size:   Acres  Square Feet  
 Sale Price:  Development Fees:   
 Water: \*  Sewer: \*   
 Sold Lot:  Yes  No Lot Acquired by 2nd Borrower:  Yes  No  
 Acquisition Cost:  Lot Status: \*

**Lot Location**

Address Line 1:  Address Line 2:   
 City:   
 State:   
 Zip Code:  Congressional District:   
 County:

- Once the information has populated, Click Save.

**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

**Lot**

Lot Number: \* 15 Lot Description: Lot 15, Block 28, Enterprise Acres  
 Lot Parcel Number: 28 Lot Size: 7,658  Acres  Square Feet  
 Sale Price: \$42,000.00 Development Fees: \$1,500.00  
 Water: \* Public Corp. Sewer: \* Public Corp.  
 Sold Lot:  Yes  No Lot Acquired by 2nd Borrower:  Yes  No  
 Acquisition Cost: \$30,300.00 Lot Status: \* Available

**Lot Location**

Address Line 1: 1525 Spock Lane Address Line 2: Unit B  
 City: Alamosa  
 State: CO  
 Zip Code: 81101 2011 Congressional District: 0803  
 County: Alamosa

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

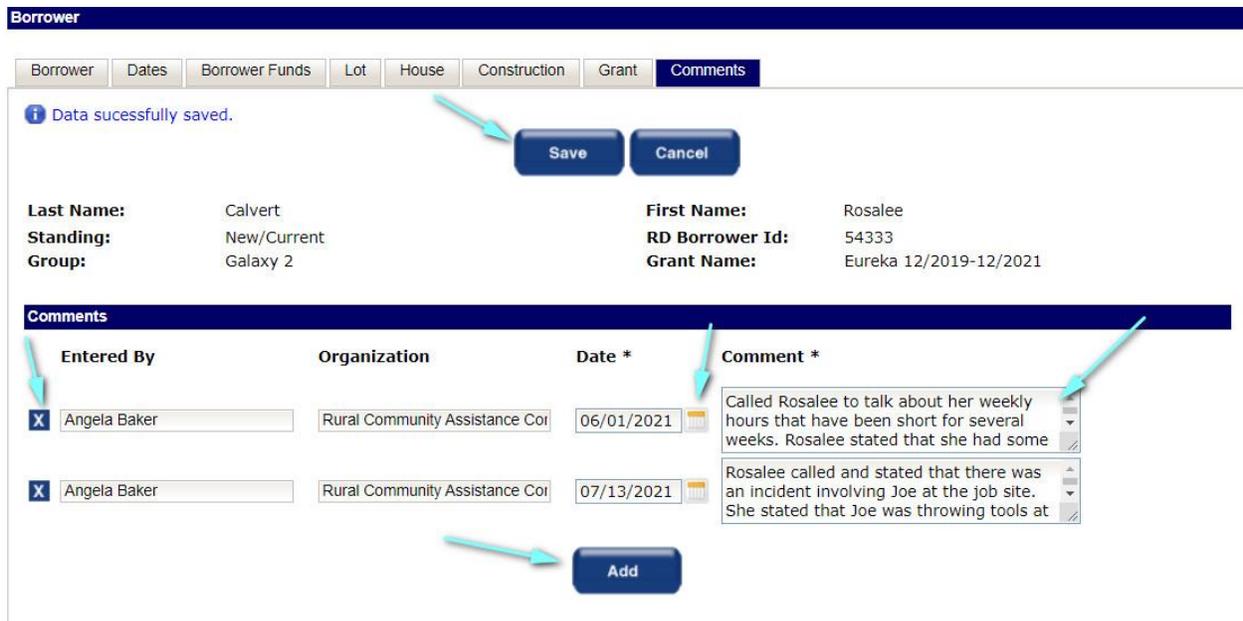


### Comments Tab

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.*



### OPENING THE BORROWER

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

**Borrower Search**

**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**

**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	<input checked="" type="checkbox"/>			<input type="checkbox"/>	
2	Footing, Foundations, columns	01/28/2020	02/04/2020	8	<input checked="" type="checkbox"/>			<input type="checkbox"/>	
3	<b>Floor slab or framing</b>	02/15/2020	02/30/2020	6	<input checked="" type="checkbox"/>			<input type="checkbox"/>	
4	Subflooring			0	<input type="checkbox"/>			<input type="checkbox"/>	
5	Wall framing sheathing			7	<input type="checkbox"/>			<input type="checkbox"/>	
6	Roof and ceiling framing, sheathing			6	<input type="checkbox"/>			<input type="checkbox"/>	
7	Roofing			5	<input type="checkbox"/>			<input type="checkbox"/>	
				<b>Total Points</b>	100	<b>Points Pledged</b>	11	<b>Points Earned</b>	8

EU 0.26

- 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 **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	0122/2020	3	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
2	Footing, Foundations, columns	01/28/2020	02/04/2020	8	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
3	<b>Floor slab or framing</b>	02/15/2020	02/30/2020	6	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
4	Subflooring			0	<input type="checkbox"/>			<input type="checkbox"/>
5	Wall framing sheathing			7	<input type="checkbox"/>			<input type="checkbox"/>
6	Roof and ceiling framing, sheathing			6	<input type="checkbox"/>			<input type="checkbox"/>
7	Roofing			5	<input type="checkbox"/>			<input type="checkbox"/>

EU 0.26 **Total Points** 100 **Points Pledged** 11 **Points Earned** 8

**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

**Construction**

Seq	Task	Actual Start	Actual End	Points	Pledge	Points Pledged	Earned	Pledge to Group
1	Excavation	11/10/2020	01/10/2020	3	<input type="checkbox"/>			<input type="checkbox"/>
2	Footing, Foundations, columns	01/15/2020	01/22/2020	8	<input checked="" type="checkbox"/>	8	8	<input type="checkbox"/>
3	Floor slab or framing	01/25/2020	02/08/2020	6	<input checked="" type="checkbox"/>	6	6	<input type="checkbox"/>
4	Subflooring			0	<input checked="" type="checkbox"/>	0		<input type="checkbox"/>
5	Wall framing sheathing			7	<input checked="" type="checkbox"/>	7		<input type="checkbox"/>
6	Roof and ceiling framing, sheathing			6	<input checked="" type="checkbox"/>	6		<input type="checkbox"/>
7	Roofing			5	<input type="checkbox"/>			<input type="checkbox"/>

EU 0.34 **Total Points** 100 **Points Pledged** 74 **Points Earned** 17

## 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 software. The interface includes a navigation bar with tabs for Borrower, Dates, Borrower Funds, Lot, House, Construction, Grant, and Comments. Below the navigation bar are three buttons: Save, Delete, and Cancel. A red arrow points to the Delete button. The form contains the following fields:

- 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.

*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	<input type="checkbox"/>			<input type="checkbox"/>
2	Footing, Foundations, columns			8	<input type="checkbox"/>			<input type="checkbox"/>
3	Floor slab or framing			6	<input type="checkbox"/>			<input type="checkbox"/>
4	Subflooring			0	<input type="checkbox"/>			<input type="checkbox"/>
5	Wall framing sheathing			7	<input type="checkbox"/>			<input type="checkbox"/>
6	Roof and ceiling framing, sheathing			6	<input type="checkbox"/>			<input type="checkbox"/>
7	Roofing			5	<input type="checkbox"/>			<input type="checkbox"/>

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

**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 *
<input checked="" type="checkbox"/> RD Loan	502 Single Family Loan	USDA RD	01/09/2020	\$178,300.00
<b>Total Amount</b>				\$178,300.00

- 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
<input checked="" type="checkbox"/> Carter, Jack	Galaxy 1	With Slab	1400	185 Nebula Ave, Alamosa, CO	Alamosa
<input checked="" type="checkbox"/> Kirk, James . T	Galaxy 1	With Slab	1600	123 Mars Drive, Alamosa, CO	Alamosa
<input checked="" type="checkbox"/> Spock, John	Galaxy 1	With Slab	1500	183 Nebula Ave, Alamosa, CO	Alamosa
<input checked="" type="checkbox"/> Stark, Chloe	Galaxy 1	With Slab	1400	188 Nebula Ave, Alamosa, CO	Alamosa
<input checked="" type="checkbox"/> Wells, Helena, G	Galaxy 1	With Slab	1600	125 Fire Fly Lane, Alamosa, CO	Alamosa
<input checked="" type="checkbox"/> Wolverine, Huah	Galaxy 1	With Slab	1500	157 Stargate Drive, Alamosa, CO	Alamosa
<input checked="" type="checkbox"/> Calvert, Rosalee	Galaxy 2	With Slab	1700	145 Fire Fly Lane, Alamosa, CO	Alamosa
<input checked="" type="checkbox"/> OBrien, Maagie	Galaxy 2	With Slab	1600	129 Fire Fly Lane, Alamosa, CO	Alamosa
<input checked="" type="checkbox"/> 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, Maaqie	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

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**

**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 Legal - like Lot & Block #'s  
Lot Parcel Number: 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:

- 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 RD Borrower Id: 54326  
Group: Galaxy 1 Grant Name: \* Eureka 12/2019-12/2021

The screenshot shows the 'Borrower' form with a confirmation dialog box overlaid. The dialog box asks, 'Are you sure you want to delete this Borrower?' and has 'OK' and 'Cancel' buttons. A red arrow points to the 'OK' button. The form fields include: Last Name: Stark, First Name: Chloe, Middle Name: (blank), 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.

- 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 red arrows pointing to the 'Save' button, the 'Group' field (Galaxy 1), and the magnifying glass icon next to the 'Grant Name' field (Eureka 12/2019-12/2021). The form fields include: Last Name: Wells, First Name: Helena, Middle Name: G, Standing: New/Current, RD Borrower Id: 54323, Group: Galaxy 1, Date of Birth: 03/12/1983, Gender: Female, Ethnicity: Caucasian, Occupation: Dental Assistant, Annual Adjusted Income: \$23,500.00, Household Size: 2, Disabled: (blank), 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.

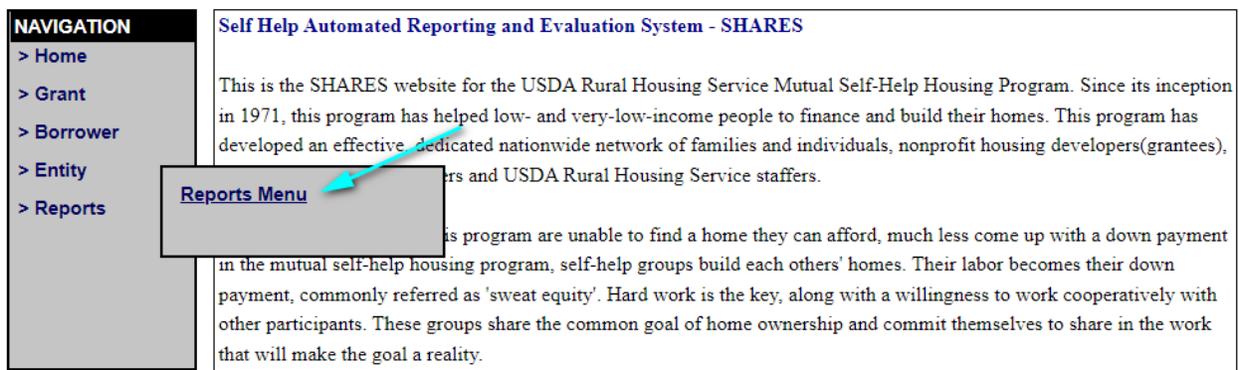
## CHAPTER 9 – RUNNING REPORTS

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.

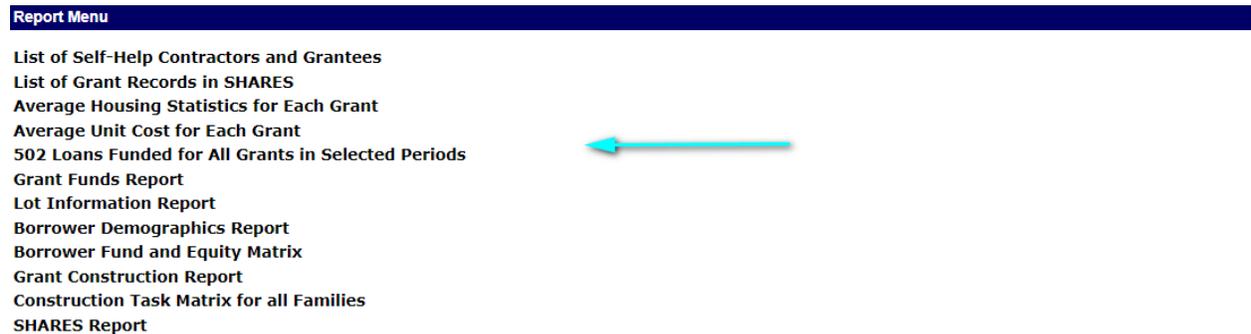
See Exhibits A-L for Report Examples.

### 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:

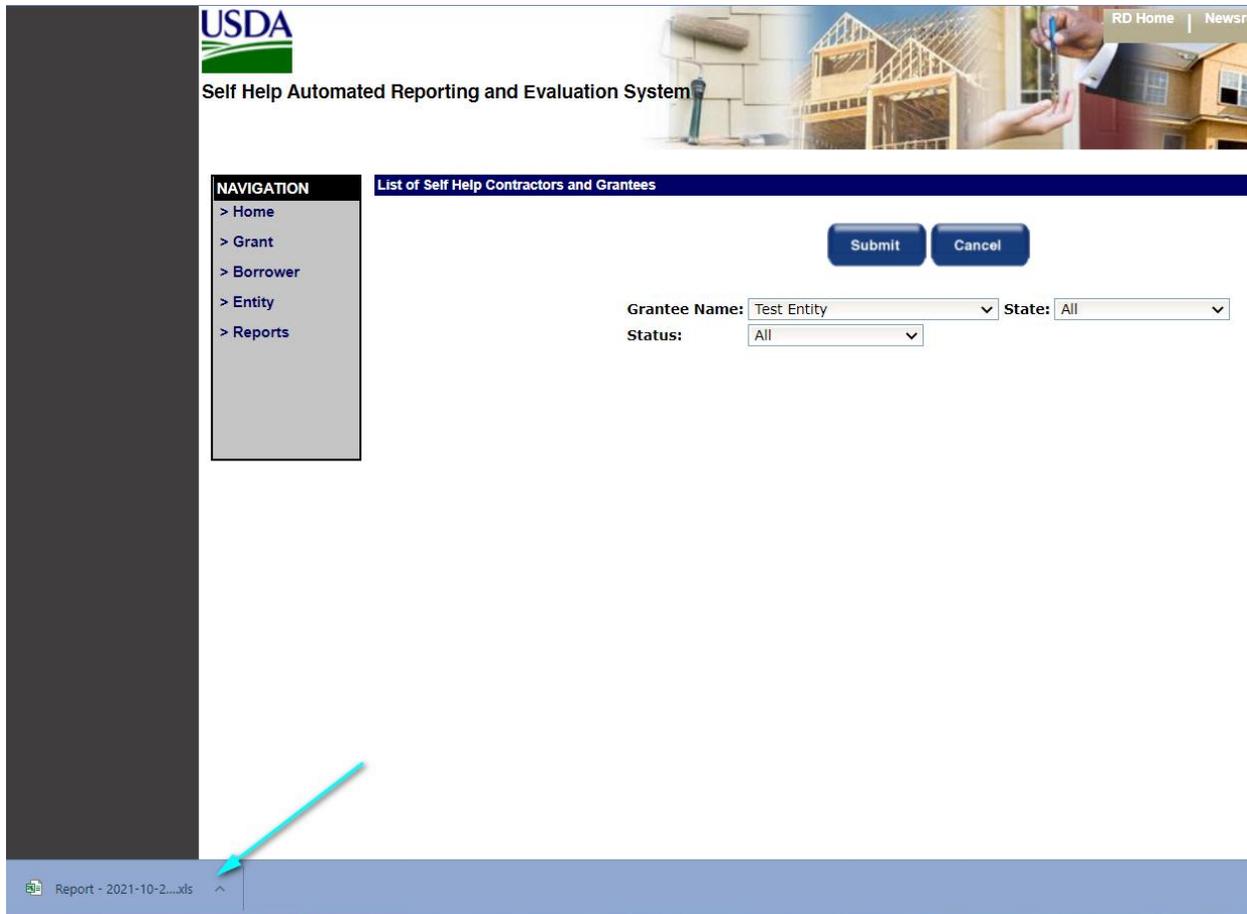
- Click on List of Self-Help Contractors and Grantees.
- Click on the drop-down menu for Grantee Name, State or Status.
  - If you are looking for a specific Grantee’s information, choose the Grantee Name.
  - If you are looking for Grantee information for any grantee in a specific state, choose State.
  - 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

Grantee Name:  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.



### 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

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

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.

The screenshot shows a dark blue header bar with the text "Grant Funds for Grant". Below the header, there are two buttons: "Submit" and "Cancel". Below the buttons, there are two dropdown menus. The first dropdown menu is labeled "Grantee Name:" and has "Test Entity" selected. The second dropdown menu is labeled "Grant Name:" and has "Eureka 12/2019-12/2021" selected. Red arrows point to the "Submit" button, the "Grantee Name" dropdown, and the "Grant Name" dropdown.

## 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.

Lot Information Report

Submit Cancel

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

## 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**

Grantee Name: 
 Grant Name:

## 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.

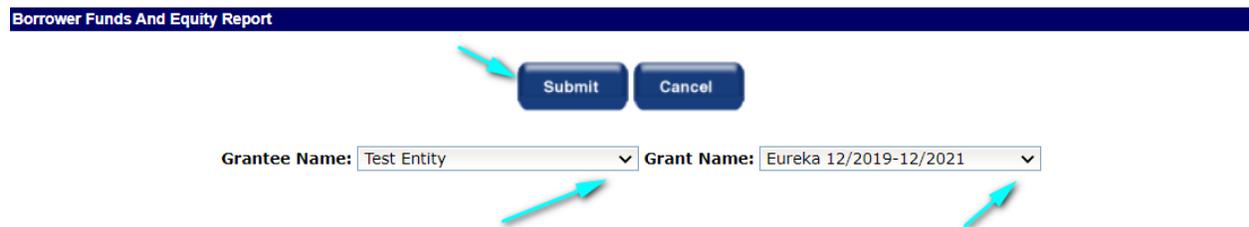
What is in the report:

- ◇ 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.



## 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.



## 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

Submit Cancel

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.

<b>List of Self-Help Contractors and Grantees Report</b>		
<b>Report Column or Field</b>	<b>Module-Screen-Field</b>	<b>Additional Information</b>
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

<b>List of Grant Records in SHARES Report</b>		
<b>Report Column or Field</b>	<b>Module-Screen-Field</b>	<b>Additional Information</b>
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 ClosedDate	
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	

<b>502 Loans Funded for All Grants in Selected Periods Report</b>		
<b>Report Column or Field</b>	<b>Module-Screen-Field</b>	<b>Additional Information</b>
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-Amount for 502 Funds	
Other Funds	Borrower-Borrower Funds-Amount for Non-502 Funds	
Total Funds	Borrower-Borrower Funds-Amount for All Funds	

<b>Grant Funds Report</b>		
<b>Report Column or Field</b>	<b>Module-Screen-Field</b>	<b>Additional Information</b>
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	

<b>Lot Information Report</b>		
<b>Report Column or Field</b>	<b>Module-Screen-Field</b>	<b>Additional Information</b>
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	

<b>Borrower Demographics Report</b>		
<b>Report Column or Field</b>	<b>Module-Screen-Field</b>	<b>Additional Information</b>
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	

<b>Borrower Fund and Equity Matrix Report</b>		
<b>Report Column or Field</b>	<b>Module-Screen-Field</b>	<b>Additional Information</b>
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	

<b>Grant Construction Report</b>		
<b>Report Column or Field</b>	<b>Module-Screen-Field</b>	<b>Additional Information</b>
Grant Name	Grant-Grant-Grant Name	
Grantee Name	Entity-Entity-Entity Name	
Borrower	Borrower-Borrower-Last Name andFirst 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 andConstruction Date	
Tasks Completed	Derived by the number of Construction Tasks completed as denoted by the End Date being filledin	
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	
--	--	--

<b>Construction Task Matrix for All Families Report</b>		
<b>Report Column or Field</b>	<b>Module-Screen-Field</b>	<b>Additional Information</b>
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	

<b>SHARES Report</b>		
<b>Report Column or Field</b>	<b>Module-Screen-Field</b>	<b>Additional Information</b>
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 foreach 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 GrantPeriod (in months) and then multiplying by 3 (for a quarter)	
Total EUs for Grant to Date – Actual	Derived by aggregating the Points foreach 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 GrantPeriod (in months) and then multiplying by the number of monthssince the Grant started	
Pre-construction EUs for this Period for Loans Pending	Derived by aggregating the Points earned by becoming Eligible for theSelf-Help Program during the Date Range on the SHARES report filterscreen 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 theSelf-Help Program to Date and the Loan is still Pending	

<p>Total EUs for Month 1 of this Quarter</p>	<p>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 first month of the Date Range on the SHARES report filter screen, then multiplied by .8</p>	
<p>Total EUs for Month 2 of this Quarter</p>	<p>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 second month of the Date Range on the SHARES report filter screen, then multiplied by .8</p>	
<p>Total EUs for Month 3 of this Quarter</p>	<p>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 third month of the Date Range on the SHARES report filter screen, then multiplied by .8</p>	
<p>Total Number of Houses for each Method of Construction</p>	<p>Borrower-House-Method Type. Aggregate total Houses by Method Type under the Grant.</p>	<p>Does not include Borrowers who have not been associated to a House.</p>
<p>Average for all Houses completed under this Grant – Living Area</p>	<p>Borrower-House-Living Area. Average the Living Area for each House under the Grant.</p>	<p>Does not include Borrowers who have not been associated to a House.</p>
<p>Average for all Houses completed under this Grant – Bedrooms</p>	<p>Borrower-House-Number of Bedrooms. Average the Number of Bedrooms per House under the Grant.</p>	<p>Does not include Borrowers who have not been associated to a House.</p>

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.	<ul style="list-style-type: none"> <li>• 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).</li> <li>• 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.</li> <li>• Run a construction report to review and ensure that your dates have all been entered correctly.</li> </ul>

<p>Comments not showing up in SHARES Report</p>	<p>Ensure the dates match the report dates that are being run.</p>	<p>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.</p>
<p>No SHARES role defined for you</p>	<p>Ensure you followed all steps to gain access to SHARES.</p>	<ul style="list-style-type: none"> <li>• Create an account at <a href="https://shares.sc.egov.usda.gov">https://shares.sc.egov.usda.gov</a></li> <li>• Confirm your identity with USDA RD</li> <li>• 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)</li> </ul>
<p>Your Reports are not generating</p>	<p>Determined by the fix that was used.</p>	<ul style="list-style-type: none"> <li>• Check your downloads file in your browser.</li> <li>• Look at the bottom of your browser page.</li> <li>• Clear your Cache and Cookies from your Browser and restart your computer.</li> </ul>
<p>Unable to login to SHARES</p>	<ul style="list-style-type: none"> <li>• Ensure all steps are followed for signing up for SHARES.</li> <li>• Keep your email address/username and password in secure location.</li> <li>• Ensure Level 2 access to</li> </ul>	<ul style="list-style-type: none"> <li>• Create an account at <a href="https://shares.sc.egov.usda.gov">https://shares.sc.egov.usda.gov</a></li> <li>• Confirm your identity with USDA RD</li> </ul> <p>Contact your regional TRC and give them your full name that was used to</p>

	<p>SHARES has been granted.</p> <ul style="list-style-type: none"> <li>• Ensure that regional TRC provider is notified of Name changes or Account Updates you made on the SHARES login Screen.</li> </ul>	<p>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).</p>
<p>Very low- and Low-Income status does not show in reports</p>	<p>None</p>	<p>The loans must be closed for the status to be populated in reports.</p>
<p>Grant Funds Report is missing data</p>	<p>Ensure all data is filled in, in the Grant Module (File)</p>	<p>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.</p>
<p>Missing points for construction tasks</p>	<p>Ensure that Construction Style has the correct style choice chosen.</p>	<p>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.</p>

EXHIBITS

Exhibit A – List of SH Contractors and Grantees

List of Self-Help Contractors and Grantees							
Name	Type	Address	State	Contact Person	Phone	Fax	Email
21st Century Homestead, Inc.	Grantee	600 South Huston Street, P.O. Box 771, Allamont, KS 67730	KS	Robert Broadway	(316) 784-2177	(316) 784-2685	21stcentury@allamontks.com
Accomack-Norfolk Housing & Redevelopment Corporation	Grantee	P.O. Box 387, Accomack, VA 23301	VA	David Annis	757-787-2800	757-787-4421	annpd@esa.net
Affordable Housing Enterprises, Inc.	Grantee	333 S. 9th Street, Griffin, GA 30223	GA		770-412-0595	770-238-4508	affordablehousingent@yahoo.com
Affordable Rural Self-Help Housing, Inc.	Grantee	200 Wickham Drive, Suite 200C, South Shields Drive, NE 64281	NE		(207) 113-4567	(207) 111-1111	robert.weber@atluslagov
Afro-American Cultural Society of the Golden Triangle	Grantee	DBA Bridgeline Project, 140 West Side Drive, Sardinia, MS 39759	MS		662-320-4171	662-320-4173	chekitaylor@yahoo.com
Alaska Community Development Corporation	Grantee	1517 Industrial Way #5, Palmer, AK 99645	AK		907-746-5680	907-746-5681	akcd@mhaonline.net
America's Dream	Grantee	201 West Walnut St, Suite 202, Green Bay, WI 54903	WI		920-366-2663	920-366-2663	americasdream@stgjobal.net
American Eagles Associates, Inc.	Grantee	8318 Washington NE, Albuquerque, NM 87113	NM	Jorge Palumbo	(505) 97-8674	(505) 97-8658	NMNAHO@aol.com
Asociación Campesina Lazaro Cardenas, Inc.	Grantee	42 North Sutter St., #406, Stockton, CA 95202	CA	Walter R. Onivas	(209) 466-6811	(209) 466-3485	wonivas@pac.org
Bay de Noc Habitat for Humanity	Grantee	2717 Dierforth Road, Escanaba, MI 49829	MI	Howard Purcell	(506) 789-4663	(506) 789-6329	
Beaulieu & Spink Enterprise Community, Inc.	Grantee	P.O. Box 68, Yala, SD 57286	SD	Andrea Torgerson	605-599-2591	605-599-2592	
Bread of Life Ministries	Grantee	157 Water Street, Augusta, ME 04330	ME	John C. Appin	207-626-3434	207-621-5385	breadoflifeministries@msn.com
Bright Valley, Inc.	Grantee	1501 Park Ave., S., PO Box 679, Holmwood, TN 38462	TN	Jerry Risner	951-786-4256	951-786-5124	jfriser@brightvalley.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) 335-4831	(740) 335-2190	screeed@actofayettescounty.org
CC of Marlboro County	Grantee	106 E. Market Street, P.O. Box 103, Bennettsville, SC 29512	SC		843-454-2188	843-454-2189	cdmccall@bellsouth.net
Compassion Unites	Grantee	1005 C Street, P.O. Box 39, Brawley, CA 92227	CA	Marin Mayne	761-331-5125	761-344-0222	marinm@cobrawley.com
Caroline County Habitat for Humanity	Grantee	PO Box 352, 114 Market Street, Ste 330, Denton, MD 21629	MD	Leslie Biome	410-479-2200	410-482-8968	lctfth@dmv.com
Caroline County Habitat for Humanity VA	Grantee	P.O. Box 365, Bowling Green, VA 22427	VA		804-596-2811	804-596-2811	
Carroll, Charles Housing Opportunities	Grantee	226 Elm Street, Youngstown, OH 44503	OH	George Gaidar	330-744-9469	330-744-9469	CCHO@cboss.com
Catholic Community Services, Inc.	Grantee	1416 Cummings Av, Superior, WI 54880	WI	Geary Valley	715-394-5651	715-394-5651	gralley@ccsusa.net
Celtic Housing and Economic Development Corporation	Grantee	252 Laurel Pkwy Avenue, PO Box 203, Celia, PR 00735	PR	Hector Nieves-Baz	787-865-3000	787-865-0716	
Central Mississippi, Inc.	Grantee	P.O. Box 749, Winona, MS 38867	MS	Pamela Gary	(662) 283-4781	(662) 283-2352	mgarycm@bellsouth.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	kvibes@occaa.org
Central Oregon Community Action Agency Network	Grantee	2303 SW First Street, Redmond, OR 97756	OR	Maris Lopez	(541) 548-2380	(541) 548-6013	carwae@coha.net
Cherokee Nation	Grantee	4149 M-75 North, P.O. Box 336, Wailoom Lake, MI 49796	MI	Yvonne Howery	(231) 335-5166	(231) 335-5163	yvhowery@hotmail.com
Chicanos Por La Causa	Grantee	1576 N Grand Ave, Nogales, AZ 85621	AZ	Alfandiro Marthier	(520) 281-4570	(520) 281-4569	alfandiro.marthier@clc.org
Chicoch Housing Assistance Corporation - Ashley & Drew	Grantee	212 E. Lincoln Street, Hamburg, AR 71646	AR	Joni Cannarella	(870) 683-8502	(870) 683-8502	chacashley@msn.com
Chicoch Housing Assistance Corporation - Chocot & Dextra	Grantee	409 Main Street, Lake Village, AR 71663	AR	Joni Cannarella	(870) 855-3237	(870) 855-3237	chocochoc@aol.com
Chippola Rainbow Homebuilders Association, Inc.	Grantee	2883 Green Street, Suite 2A, P.O. Box 917, Marianna, FL 32447	FL	Elmore Bryant	(850) 482-3766	(850) 482-7089	chc@phoni.com
Christian Housing Development Organization, Inc.	Grantee	118 S McCary Rd, Suite 145, P.O. Box 1042, Columbus, MS 39203	MS		662-329-0066	662-329-6886	christiandevtop@bellsouth.net
Citizens for Affordable Homes, Inc.	Grantee	100 Pine Cone Road, Dayton, NV 89403	NV	Ron Trunk	(775) 883-7101	(775) 883-7115	ron@affhhs.org
City of Brawley	Grantee	285 Imperial Avenue, Brawley, CA 92227	CA	Francisco Soto	(760) 344-8612	(760) 351-2656	franciscosoto@yahoo.com
City of Casa Grande Housing Division	Grantee	1510 E. Florence Blvd., Casa Grande, AZ 85222	AZ	Rosa E. Bruce	(520) 421-8600	(520) 421-8602	rosab@lcase.grandaz.us
City of Junction City	Grantee	PO Box 287, Junction City, KS 66441	KS	Dan O'Brien	785-740-3103	785-740-1902	dan.o'brien@jcityks.com
City of Lake City Affordable Homes	Grantee	150 North Alpheus Street, P.O. Box 1687, Lake City, FL 32055	FL	W. R. Rickard	904-752-4886	904-752-4886	colcock@grcup.net
City of Laurel	Grantee	401 North 5th Street, Laurel, MS 39441	MS	Mary Edmonson	601-428-6200	601-428-6415	maryedmonson@laurelms.com
City of Liberal	Grantee	324 N. Kansas Ave., Liberal, KS 67801	KS		(620) 626-2250	(620) 626-0589	karen.lafontaine@cityofliberal.org
City of Mass Point	Grantee	4412 Denny Street, Moss Point, MS 39563	MS	Daphne Viverette	(228) 474-2345	(228) 474-2501	godaphne_v@yahoo.com
City of Rawlins	Grantee	PO Box 953, Rawlins, WY 82301	WY	Ron Kigorce	(307) 338-4513	(307) 338-4580	ronkigorce@rawlins-wy.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															
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
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	\$189,483.00	\$44,345.00
Test Entity	MT	Fake Grant 9999	Current Grant	20	0	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	\$1,200,000.0	\$40,000.00	\$50,000.00	\$1,200,000.0	0.0	\$-	\$-	
Eureka 12/2019-12/2021	CO	Test Entity	Current Grant	24	\$1,136,000.0	\$47,333.33	\$351,060.00	\$1,136,000.0	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 F - Grant Funds for Grant Report

Grant Funds for Grant						
Funds Received		Eureka 12/2019-12/2021	Test Entity			
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			
523 Funds Received:	\$235,820.00			\$0.00		\$235,820.00
				Other Funds Received:		Total Funds Received: 00
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			
523 Funds Used :	\$351,060.00			\$30,000.00		Total Funds Used : \$381,060.00
				Other 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.	
<b>Total Number of Lots :</b>	14	<b>Lots Assigned to Borrowers :</b>	3	<b>Lots not Assigned to Borrowers :</b>	11					

Exhibit H – Borrower Demographics Report

Borrower Demographics Report																			
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.	
As of: Oct 29, 2021																			
Eureka 12/2019-12/2021 Test Entity																			
Burkhardt, Nick	Galaxy 1	New/Current	Closed	01/25/2020	Other	Low	Uber Driver	3	Rental	No	No	No	54330		Native American	Male	Unmarried	No	
Carter, Jack	Galaxy 1	New/Current	Closed	01/26/2020	502	Very Low	Taxi Driver	3	Living With Family	No	No	No	54328		Native American	Male	Unmarried	No	
Kirk, James, T	Galaxy 1	New/Current	Withdrawn	02/03/2020	502	Low	Construction Worker	5	Manufacture of Mobile	No	No	No	54324		Native American	Male	Married	No	
Lea, Princess	Galaxy 1	Released From Property	Withdrawn	02/16/2020	502	Low	Bookkeeper	3	Rental	No	No	No	54322		Asian/Pacific Islander	Female	Unmarried	No	
Spock, John	Galaxy 1	New/Current	Withdrawn	04/15/2020	502	Low	Occupational Therapist	3	Rental	No	No	No	54327		Black	Male	Unmarried	No	
Stark, Chloe	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	
Wells, Helena, G	Galaxy 1	New/Current	Closed	11/18/2019	502	Very Low	Dental Assistant	2	Living With Family	No	No	No	54323		Caucasian	Female	Unmarried	No	
Wolmer, Hugh	Galaxy 1	New/Current	Closed	12/16/2019	502	Low	Sales	3	Rental	No	No	No	54321		Black	Male	Unmarried	No	
Calvert, Rosalee	Galaxy 2	New/Current	Closed	04/16/2021	502	Low	Baggage Handler	4	Rental	Yes	No	No	54333		Black	Female	Separated	No	
O'Brien, Maggie	Galaxy 2	Released From Property	Withdrawn	09/29/2021	502	Low	Sales	3	Rental	No	No	No	54331		Caucasian	Female	Married	No	
Rovaline, Aister	Galaxy 2	Released From Property	Withdrawn	06/15/2021	Other	Low	Sales	3	Rental	No	No	No	54334		Caucasian	Female	Unmarried	No	
Stero, Jill	Galaxy 2	New/Current	Closed	04/16/2021	502	Very Low	Sales	4	Rental	No	No	No	54330		Hispanic	Female	Unmarried	No	
Blake, Allison		Released From Property	Withdrawn	02/03/2020	Other	Low	Customer Service Rep	4	Rental	No	No	No	54329		Hispanic	Female	Married	No	
Peterson, Judy		New/Current	Pending		Other	Low	Mechanic	4	Rental	No	No	Yes	54329		Black	Female	Married	No	
Monteregro, Angela		New/Current	Pending		Other	Low	Sales	3	Rental	Yes	No	No	54332		Native American	Female	Unmarried	No	
Skywalker, Lilly		New/Current	Pending		Other	Low	Hair Dresser	2	Living With Family	No	No	Yes	54325		Native American	Female	Unmarried	No	
Low Income Families:	13.0																		
Very Low Income Families:	3.0																		
Families with Loan Pending:	3.0																		
Families with Loan Rejected:	0.0																		
Families with Loan Withdrawn:	6.0																		
Families with Loan Closed:	7.0																		

Exhibit I – Borrower Funds and Equity Report

Borrower Funds and Equity Report																	
As of: 10/20/2021	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	123 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	\$265,000.00	\$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	Skywalker, 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	Moreno, 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 Scagete 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	\$188,000.00	\$0.00	\$0.00	\$0.00	\$188,000.00	\$0.00	\$188,000.00
Eureka 12/2019-12/2021	Test Entity	Kirk, James, T	Galaxy 1	1509	123 Mars Drive	Low	5	\$38,400.00	\$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	\$38,400.00	\$25,900.00	\$210,000.00	\$171,600.00	\$0.00	\$0.00	\$0.00	\$171,600.00	\$0.00	\$171,600.00
Eureka 12/2019-12/2021	Test Entity	Sark, Chloe	Galaxy 1	1507	188 Nebula Ave	Low	4	\$33,400.00	\$31,300.00	\$210,000.00	\$178,800.00	\$0.00	\$0.00	\$0.00	\$178,800.00	\$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	\$187,000.00
Eureka 12/2019-12/2021	Test Entity	Calvert, Rosalee	Galaxy 2	1512	145 Fire Fly Lane	Low	4	\$48,800.00	\$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	\$35,100.00	\$33,200.00	\$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	\$36,880.00	\$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	\$60,000.00
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	\$39,000.00
Total Families:																	
Total Families with Approved Loans:		17															
Total Families with Pending 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 Start 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	Lea, 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	O'Brien, 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
										<b>Total EUs :</b>	<b>3.9560000000000001</b>

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	Spoek, 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	7	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

<b>As of : Oct 29,2021</b>		<b>Quarterly Evaluation Report for Self-Help Technical Assistance Grants</b>	
		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	
	b. Counties Served :	Alamosa	
	c. Grant Start Date :	12/20/2019	Grant Extension Date : 12/19/2022
	Grant End Date :	12/19/2021	
3.		<b>Actual</b>	<b>Planned</b>
	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

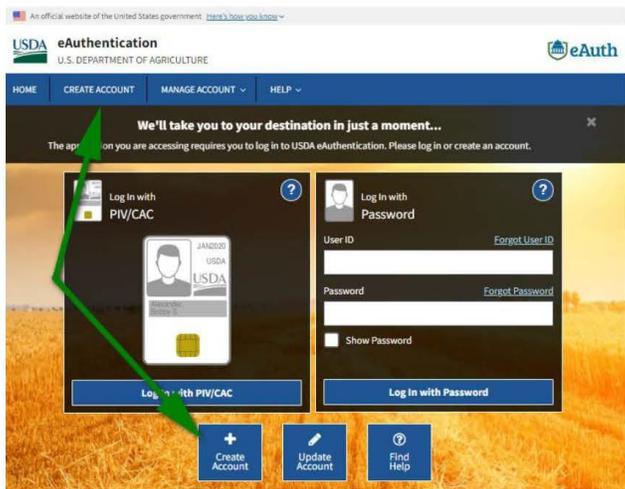
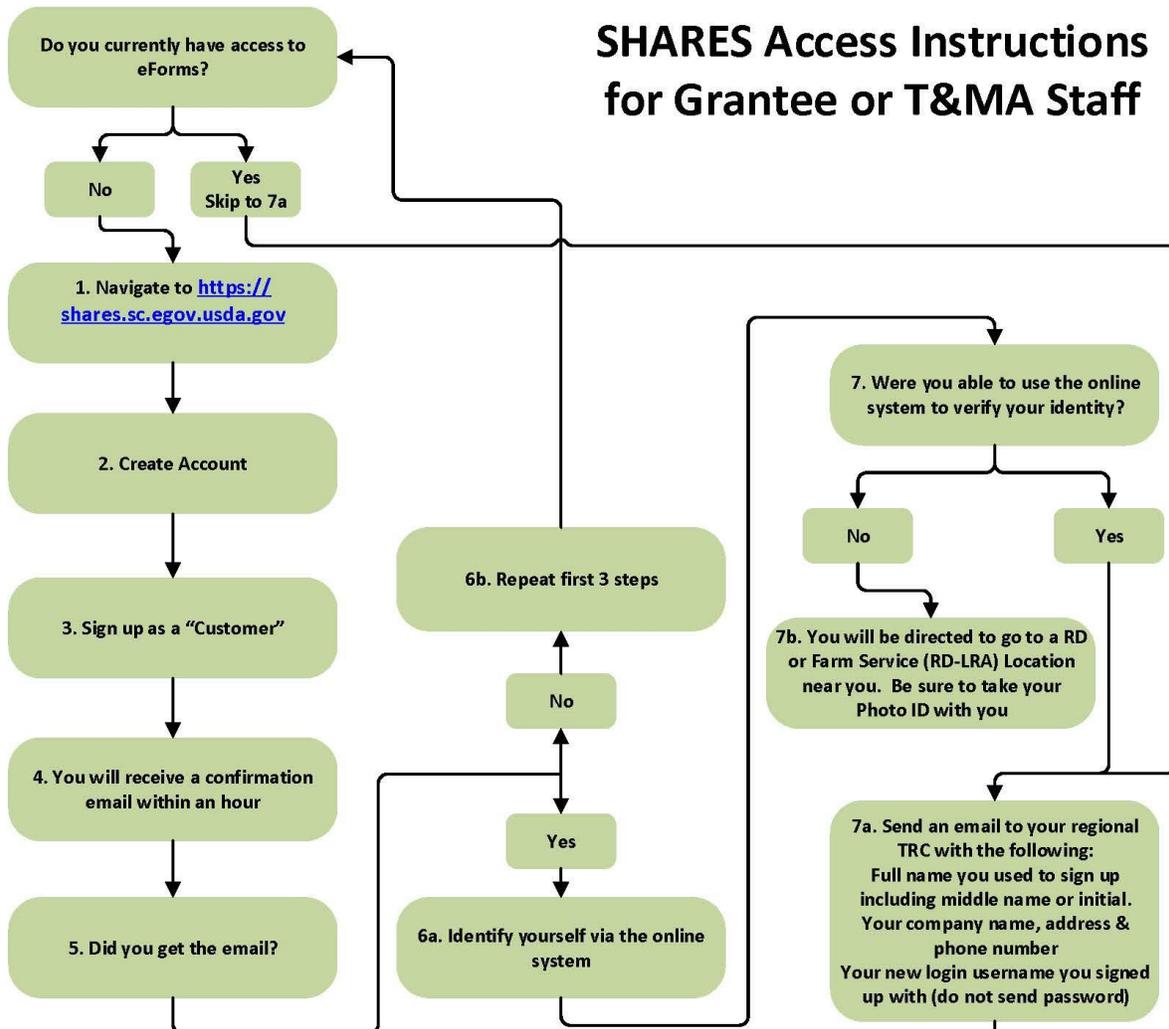
**TA Staff turnover**

We have been assigned a new TA provider in August.

**Certified By**  
 \_\_\_\_\_  
**Title :** \_\_\_\_\_  
**Date :** \_\_\_\_\_

Exhibit M – SHARES – Access Instructions for Grantees-TRC

## SHARES Access Instructions for Grantee or T&MA Staff



8. Try logging in after a week. If you see a notice that says “You have no assigned role” your access is not granted yet. Please keep checking. If you do not have access after 2 weeks, please contact us.

**Questions?**  
Please contact the SHARES Technical Resource Coordinator (TRC) with your regional Technical & Management Assistance organization.

REV 03/2022

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

# SHARES

## Borrower Dates Tab & Construction Tab

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

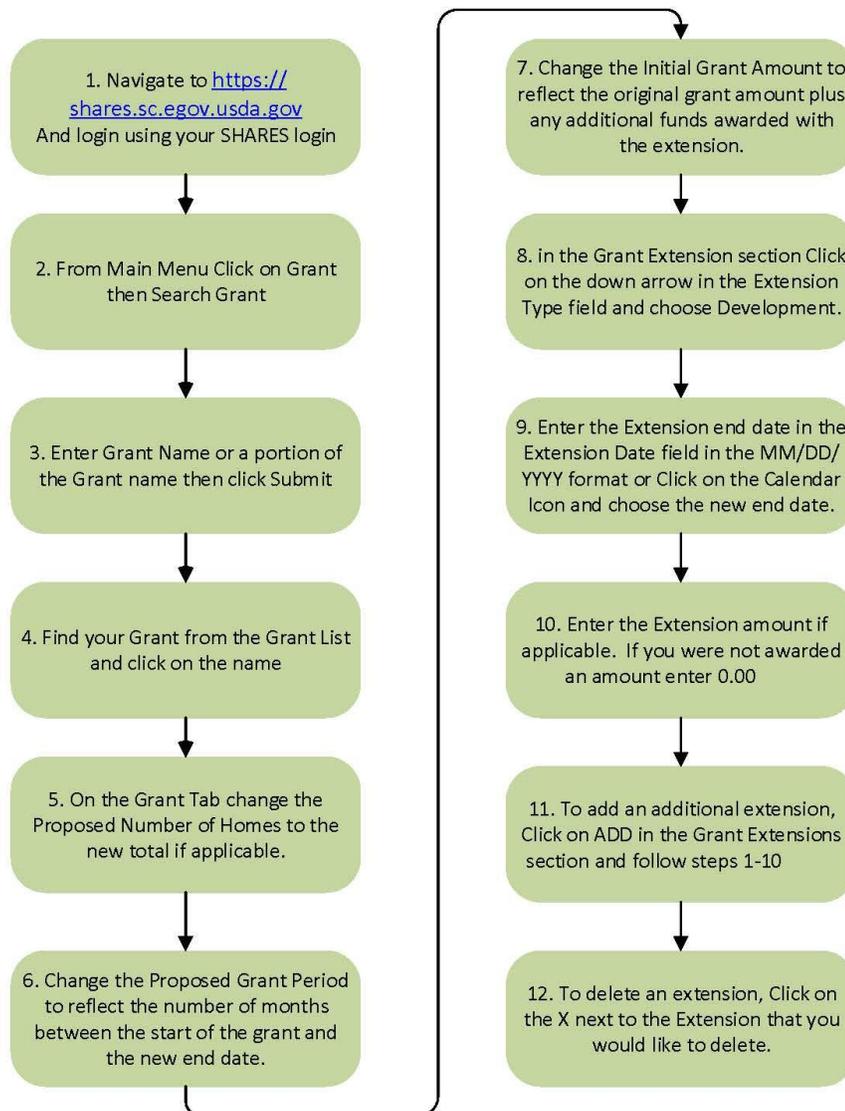


Exhibit P - SHARES - Group Name Key Based on Status

**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

Save
Delete
Cancel

<b>Last Name: *</b> Calvert	<b>First Name: *</b> Rosalee	<b>Middle Name:</b>
<b>Standing: *</b> New/Current	<b>RD Borrower Id:</b> 54333	
<b>Group:</b> Inquiry	<b>Grant Name: *</b> Eureka 12/2019-12/2021	

Background

<b>Date of Birth:</b> 08/03/1982	<b>Primary Funding Source: *</b> 502
<b>Gender:</b> Female	<b>Income Level: *</b> Low Income
<b>Ethnicity:</b> Black	<b>Marital Status:</b> Separated
<b>Occupation:</b> Baggage Handler	<b>Annual Income:</b> \$48,300.00
<b>Annual Adjusted Income:</b> \$47,200.00	<b>Dependents:</b> 3
<b>Household Size: *</b> 4	<b>Type of Dwelling:</b> Rental
<b>Disabled:</b> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	<b>Extended Family:</b> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
<b>Deficient Housing:</b> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	<b>RD Area Loan Limit:</b> \$285,000.00
<b>Energy Efficiency Required:</b> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	<b>Loan Amount:</b> \$220,000.00

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

# Deleting a Borrower and/or Re-associating a Lot and/or House to Another Borrower

