

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Withdrawn/Rejected	The applicant has withdrawn, is no longer interested in the program or has received a rejection notice.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

Last Name: *

Standing: *

Group:

First Name: *

RD Borrower Id:

Grant Name: *

Middle Name:

Background

Date of Birth:

Gender:

Ethnicity:

Occupation:

Annual Adjusted Income:

Household Size: *

Disabled:

Deficient Housing: Yes No

Energy Efficiency Required: Yes No

Primary Funding Source: *

Income Level: *

Marital Status:

Annual Income:

Dependents:

Type of Dwelling:

Extended Family: Yes No

RD Area Loan Limit:

Loan Amount: