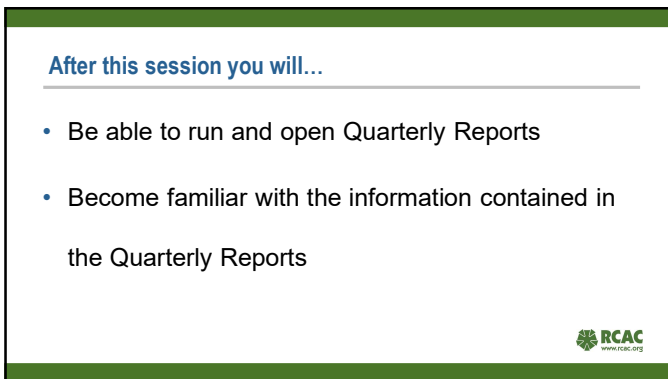




1




2



3

Open Reports Menu

- Hover over Reports then Click on Reports Menu



NAVIGATION

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

Self Help Automated Reporting and Evaluation System - SHARES

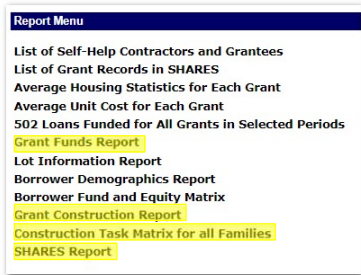
This is the SHARES website for the USDA Rural Housing Service Mutual Self-Help Housing Program. In 1971, this program has helped low- and very-low-income people to find a home. It has developed an effective, dedicated nationwide network of families and individuals who are working with USDA Rural Housing Service staff to help them find a home. If a program is unable to find a home they can build on their own, in the mutual self-help housing program, self-help groups build each other's homes. Payment, commonly referred to as 'sweat equity'. Hard work is the key, also other participants. These groups share the common goal of home ownership that will make the goal a reality.

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Reports Menu

- There are 12 reports available on the Reports menu
- Quarterly Reports focus on 4 of those reports



Report Menu

- List of Self-Help Contractors and Grantees
- List of Grant Records in SHARES
- Average Housing Statistics for Each Grant
- Average Unit Cost for Each Grant
- 502 Loans Funded for All Grants in Selected Periods
- Grant Funds Report
- Lot Information Report
- Borrower Demographics Report
- Borrower Fund and Equity Matrix
- Grant Construction Report
- Construction Task Matrix for all Families
- SHARES Report

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Disclaimer

- Reports shown in this training have been run with the SHARES Macro.
- SHARES Macro creates cleaner, shorter and better formatted reports
- To receive instructions for installing SHARES Macro please contact shares@rcac.org

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6

Standard Report vs SHARES Macro Report

Standard Version

Macro Version

RCAC www.rcac.org

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Report Menu

- Click on Grant Funds Report in the Report Menu

Report Menu

- List of Self-Help Contractors and Grantees
- List of Grant Records in SHARES
- Average Housing Statistics for Each Grant
- Average Unit Cost for Each Grant
- 502 Loans Funded for All Grants in Selected Periods
- Grant Funds Report
- Lot Information Report
- Borrower Demographics Report
- Borrower Fund and Equity Matrix
- Grant Construction Report
- Construction Task Matrix for all Families
- SHARES Report

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Grant Funds Report Parameters

Grant Funds for Grant

Submit Cancel

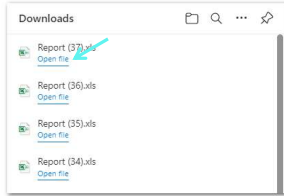
Grantee Name: Grant Name:

- Choose Grantee Name from drop down list
- Choose appropriate grant from Grant Name drop down list

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9

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Grant Funds Report

- Report contains:
 - Funds Used
 - Funds Received
 - Total Grant Funds
 - Approved Cost Per Unit
 - 523 Balance

Grant Funds for Grant			
Test Entity			
Eureka 11/2021 - 11/2023			
As of: April 4, 2023			
Funds Received		Grant Date	Amount
523 Grant	Draw 1 - Group 15.2	01/30/2022	\$102,000.00
523 Grant	Draw 2 - Group 15.2	02/28/2022	\$10,560.00
523 Funds Received			\$110,560.00
Other Funds Received			\$1.00
Total Funds Received			\$110,560.00
Funds Used		Grant Date	Amount
523 Grant	Monthly Expenses - November	11/30/2021	\$10,000.00
523 Grant	Monthly expenses - December	12/31/2021	\$10,560.00
523 Grant	Monthly Expenses - January	01/31/2022	\$10,560.00
523 Grant	Monthly Expenses - February	02/28/2022	\$10,000.00
523 Funds Used			\$110,560.00
Other Funds Used			\$1.00
Total Funds Used			\$110,560.00
Total Grant Funds			\$110,560.00
Total 523 Funds Used			\$110,560.00
Total Funds Used			\$110,560.00
523 Balance			\$10,560.00
Other Balance			\$1.00
Net Balance			\$10,560.00
		Proposed Homes	24
		Units Earned	\$1.32
		Approved Cost Per Unit	\$10,200.00
		Actual Cost Per Unit	\$10,560.00
		523 Funds Available	\$10,560.00



11

Report Menu

- Click on Grant Construction Report in the Report Menu

Report Menu	
List of Self-Help Contractors and Grantees	
List of Grant Records in SHARES	
Average Housing Statistics for Each Grant	
Average Unit Cost for Each Grant	
502 Loans Funded for All Grants in Selected Periods	
Grant Funds Report	
Lot Information Report	
Borrower Demographics Report	
Borrower Fund and Equity Matrix	
Grant Construction Report	
Construction Task Matrix for all Families	
SHARES Report	



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Grant Construction Report Parameters

- Choose Grantee Name from drop down list
- Choose appropriate Grant Name from drop down list
- Click Submit

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Grant Construction Report

- Double check Pledged points
- Double check Construction Points
- Confirm EU's for each borrower are correct
- Search for data issues
- Comparing to SHARES report can identify date issues on construction tab
- Identify how many units your organization's capacity can reasonably complete in 2 years

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Report Menu

- Click on Construction Task Matrix for all Families Report in the Report Menu

Report Menu

List of Self-Help Contractors and Grantees
List of Grant Records in SHARES
Average Housing Statistics for Each Grant
Average Unit Cost for Each Grant
502 Loans Funded for All Grants in Selected Periods
Grant Funds Report
Lot Information Report
Borrower Demographics Report
Borrower Fund and Equity Matrix
Grant Construction Report
Construction Task Matrix for all Families
SHARES Report



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Construction Task Matrix Parameters

Construction Task Matrix for all Families

Submit

Cancel


Grantee Name: Test Entity

Grant Name: Eureka 11/2021 - 11/2023

As of Start Date: 01/01/2023

As of End Date: 03/31/2023

- Choose Grantee Name from drop down
- Choose appropriate Grant Name from drop down
- Manually enter or use calendar icon to add start and end dates
- Click submit



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Downloads


Report (40).xls
Open File

Report (39).xls
Open File

Report (38).xls
Open File

Report (37).xls
Open File

Report (36).xls
Open File



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Construction Task Matrix

You will be able to view all 27 tasks for each borrower and their progress based on dates

- This report is great for:
 - RD to determine where the grant is related to the construction phase.
 - Providing a snapshot of the construction phase status.
 - Estimating how much time until conversions should be scheduled.

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Report Menu

- Click on SHARES Report in the Report Menu

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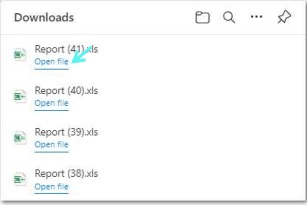
SHARES Report Parameters

- Choose Grantee Name from drop down
- Choose appropriate Grant Name from drop down
- Manually enter or use calendar icon to add start and end dates
- Choose Quarterly from the Report Period drop down
- Click Submit


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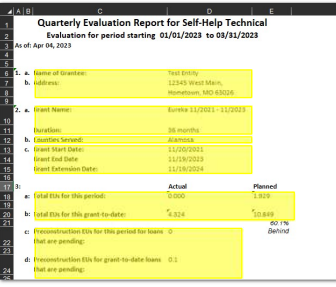

- Click on Open File to open the document that was downloaded



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SHARES Report 1-3

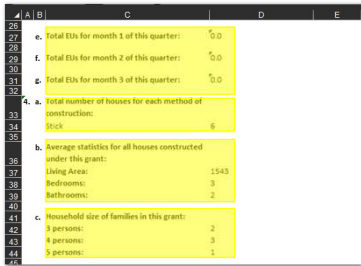

- All information contained in the SHARES Report is the same information asked for in the 1944-I Exhibit B Evaluation Report of Self-Help Technical Assistance (TA) Grants

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SHARES Report 3-4

- Always double check the information in your SHARES report for accuracy

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SHARES Report 5-6

- Look for your low and very-low-income numbers here
- Number of days between submission of self-help borrower's docket and approval/rejection is tied to the dates entered in the borrower's files.

	A	B	C	D	E
45	5.	a.	Number of houses proposed under this grant:	24	
46	47	b.	Number of houses completed under this grant:	0	
48	48	c.	Number of houses currently under construction:	5	
49	50	d.	Number of families in preconstruction:	2	
51	51	e.	Number of families contacted:	6	
52	52	f.	Number of low-income families:	4	
53	53	g.	Number of very low-income families:	2	
54	54	h.	Number of construction supervisors:	2	
55	55	i.	Number of TA employees:	8	
56	56	j.	Average Appraisal Value of units for this grant:	\$218,142.86	
57	57	k.	Average Loan Amount for this grant:	\$120,332.24	
58	58	l.	Average Borrower Equity:	\$47,885.72	
59	60	6.	Average days needed to construct a house under this grant:	11 days	or ~0.4 mo.
61	61	m.	Number of days between submission or self-help borrower's docket and approval/rejection:	22	
62					



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SHARES Report 6-7

- Comments need to be included in all quarterly SHARES reports. These are entered in the Problems tab of the Grant File
- It is required to certify the SHARES report for quarterly meetings.

	A	B	C	D	E
63	63	c.	Total number of loan dockets approved or rejected:	8	
64	64	d.	Total number of loan docket rejections for grant to date:	0	
65	65	e.	Percentage of loan docket rejections for grant to date:	0.00	
66	66	f.	Did any of the following adversely affect the grantee's ability to accomplish program objectives?		
67	67	1.	Staff Turnover	No	
68	68	2.	Staff Turnover	No	
69	69	3.	Staff Turnover	No	
70	70	4.	Loan processing delays	No	
71	71	5.	Other acquisition and development	No	
72	72	6.	Unavailable loan/grant funds	No	
73	73	7.	Lack of participants	No	
74	74	8.	Communication between MD/Quarter	No	
75	75	9.	Other Problems or Comments	Yes	
76	76	g.	Comments		
77	77	h.	Other Problems or Comments		
78	78				
79	79				
80	80				
81	81				
82	82				
83	83				
84	84				
85	85				
86	86				
87	87				



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SHARES Report 7 – With Comments

- Comments should include anything that has happened good or bad during the quarter.

	A	B	C	D	E
88	88	a.	Did any of the following adversely affect the grantee's ability to accomplish program objectives?		
89	89	1.	Staff Turnover	Yes	
90	90	2.	Staff Turnover	No	
91	91	3.	Staff Turnover	No	
92	92	4.	Loan processing delays	No	
93	93	5.	Other acquisition and development	No	
94	94	6.	Unavailable loan/grant funds	No	
95	95	7.	Lack of participants	Yes	
96	96	8.	Communication between MD/Quarter	No	
97	97	9.	Other Problems or Comments	No	
98	98	b.	Comments		
99	99	c.	Other Problems or Comments		
100	100				
101	101				
102	102				
103	103				
104	104				
105	105				
106	106				
107	107				
108	108				
109	109				
110	110				
111	111				
112	112				
113	113				
114	114				
115	115				
116	116				
117	117				
118	118				
119	119				
120	120				



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Comments in Grant File

- To ensure comments show in the SHARES Report the report cycle, start dates and end dates need to match the report dates.

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Questions, Tech Support or SHARES Access Questions

Technical Issues, System Outages, Page Errors	Login Issues	Process, Training, Access Questions
800-457-3642, select USDA Applications (Press 2); then select Rural Development (Press 2)	1-800-457-3642 (Option 1)	Nancy 406-579-5202 Anne 928-583-4952
rd.hd1@usda.gov	eAuthenticationHelpDesk@ftc.usda.gov	shares@rcac.org

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