Important Links

eForms Main login screen

eAuthentication (usda.gov)

eAuth legacy login screen

(Access to browse forms without logging in)

eForms Home (usda.gov)

eForms Training for Self-Help Grantees

1

After this session you will be able to…

- Sign up for eAuthentication

- Login to eForms

- Complete 410-4 Uniform Residential Loan Application

- Create loan package and attach documents

- Submit full loan package

- Know where to get help

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Note about Browsers

- This training was compiled and completed using the Microsoft Edge browser. You are welcome to use any browser you wish, however please note that currently Microsoft Edge is better optimized to work with eForms than other browsers.

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Accessing eForms

- eAuthentication (eAuth) access is required

- The eAuth system will verify your ID during set up

- After eAuth access is set up you will be able to login to eForms

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Create Account

- Navigate to https://forms.sc.egov.usda.gov

- Click on Register

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Account Registration

- Choose Customer for the user type

- Click Continue

6

Email address

- Enter the email address you would like to use for your account

- Click Submit
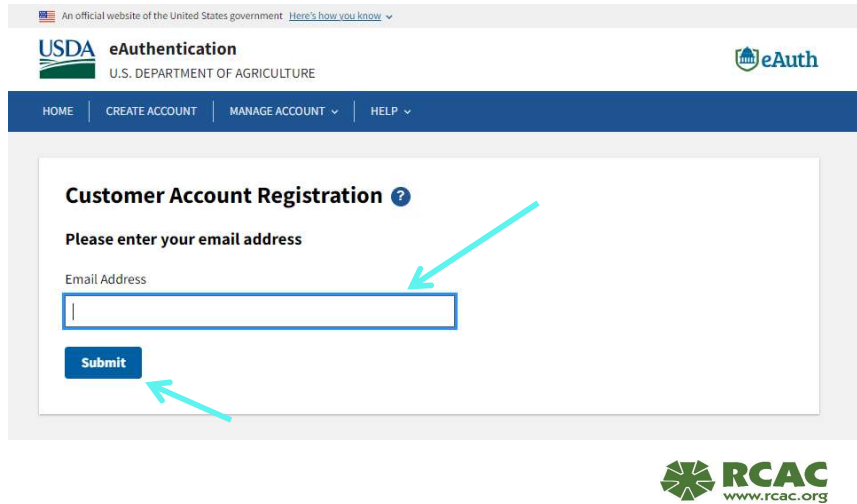
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Registration email
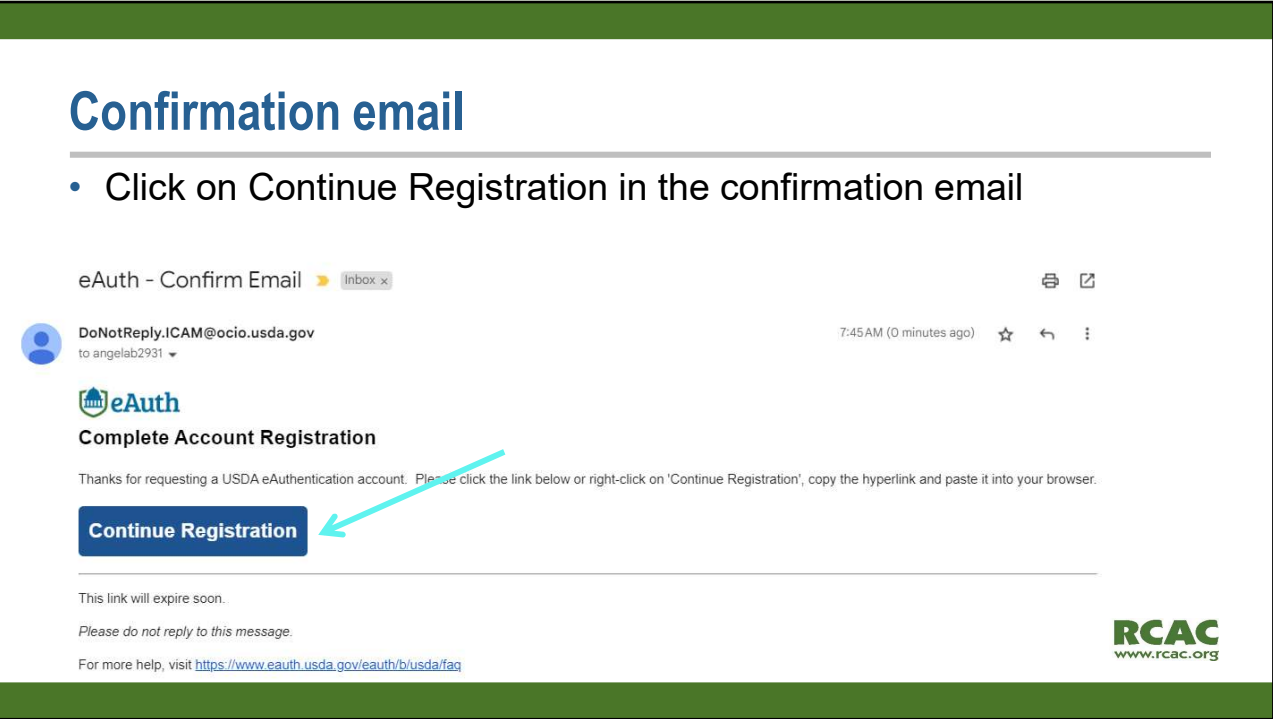
- You will get a message that a registration email was sent. Now check your email box for a confirmation email.
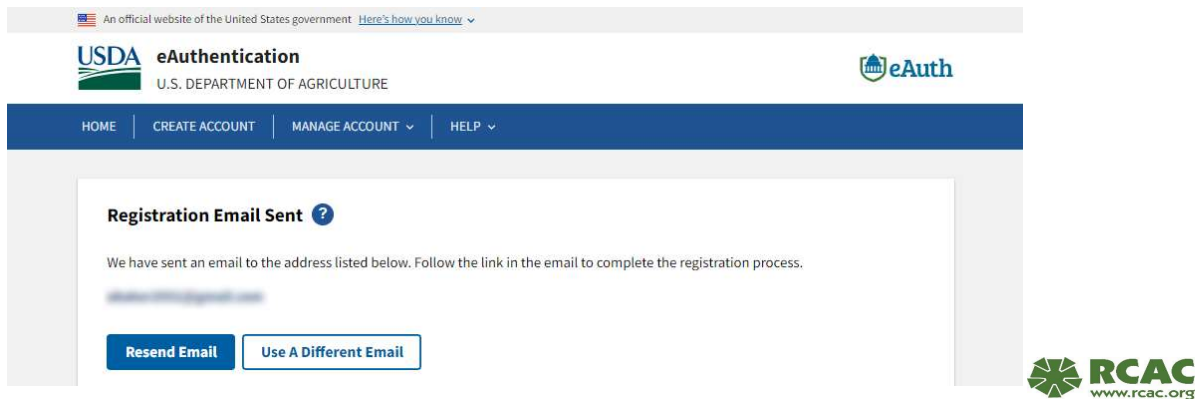
8

Confirmation email

- Click on Continue Registration in the confirmation email
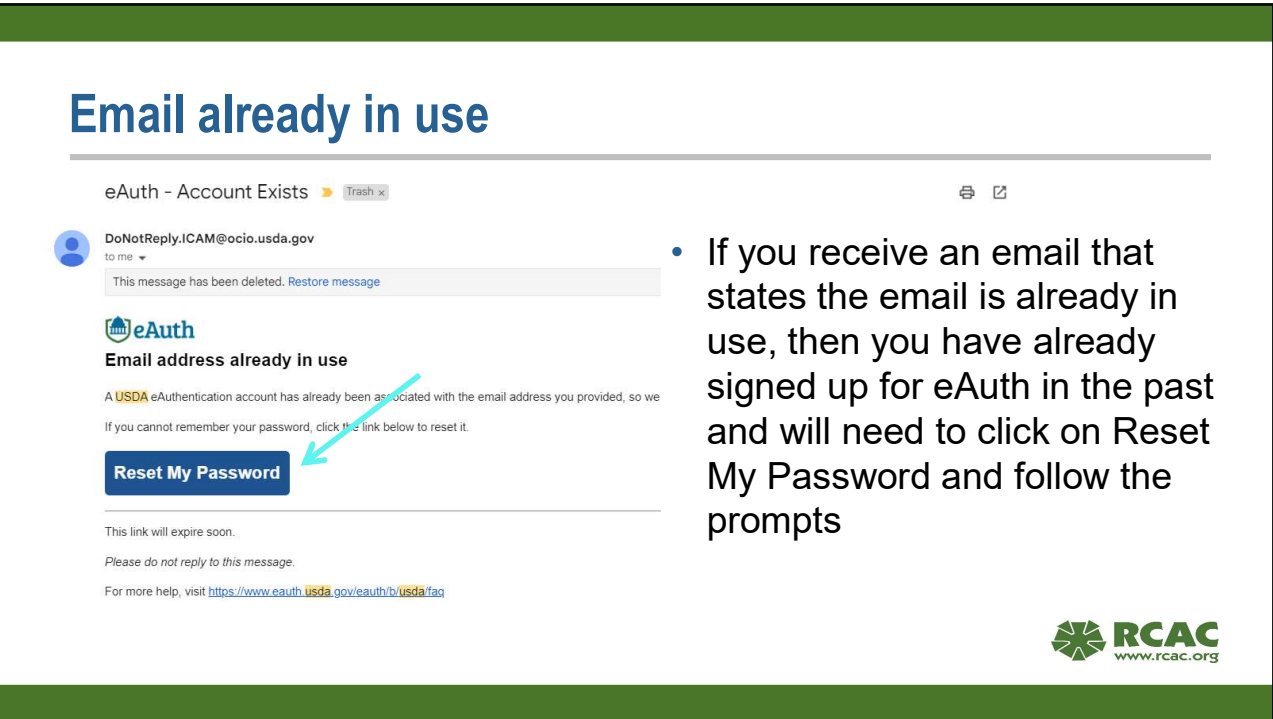
9

Email already in use

- If you receive an email that states the email is already in use, then you have already signed up for eAuth in the past and will need to click on Reset My Password and follow the prompts

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Continue Registration

- Once you click on Continue Registration you will need to fill out the following customer account information

- Click Submit

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Account Registration Complete

- Click on Login to your application

12

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Start verification process

- You will still need to verify your identity to gain full access to eForms.

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Manage Account

- Bookmark this page for quick access to eForms login

- Click Manage Account

- Click Update Account

14

Verify Identity

- Click on Verify My Identity

- You will be asked a series of questions specific to you and your history. This will include banking information, credit information, previous addresses etc.

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Login to eForms

- Login to eForms using the eAuth account login that you set up.

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Good to know

- Be sure to bookmark the page and be careful to use that bookmark. Many government systems have a login page that look identical without any way to differentiate them from each other.
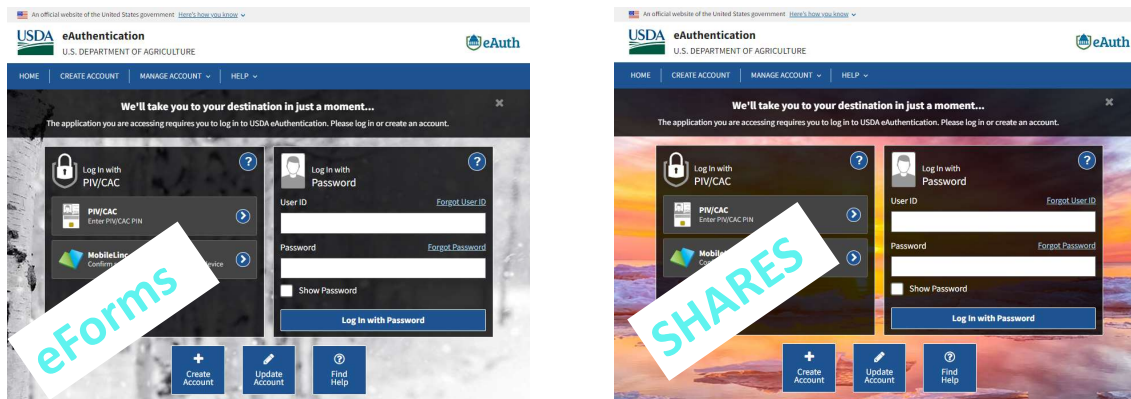
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Why All the Hype around eForms Recently?

- It is now required to submit all loan applications via eForms.
- Using eForms eliminates duplicative work for RD Staff.
- Submitting through eForms allows RD to easily transfer the information directly into their loan system without having to manually enter the information
- Provides a way to prove and track your submissions
- Saves Time for everyone!

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Compile Your Documentation
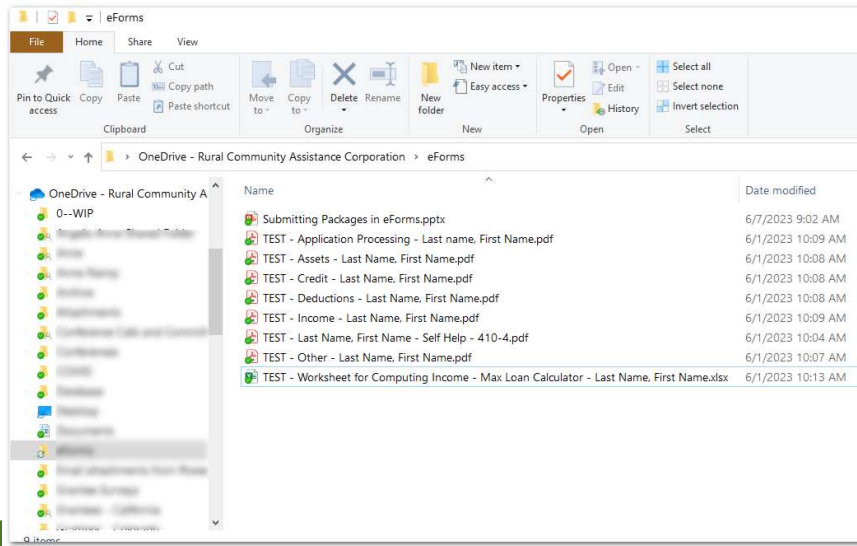
19

Use Cover Pages for Each Section

- Create a cover page for each section
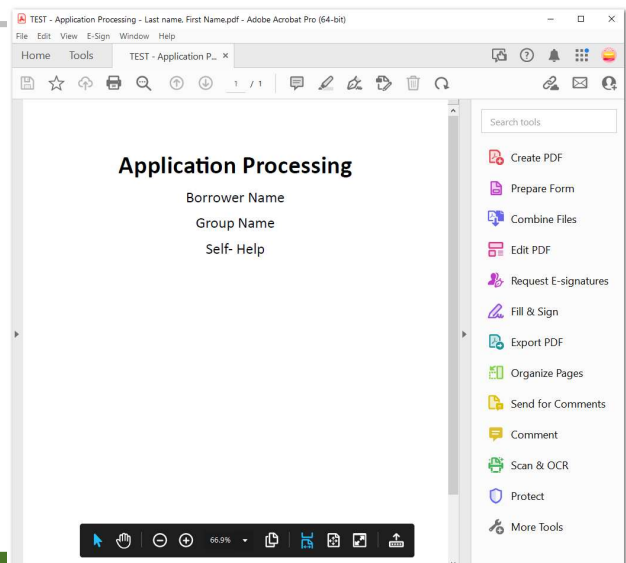
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Documentation

- Each section should be saved as a separate PDF (Excel for the Income Calculator)
  - Application Processing
  - Income
  - Deductions
  - Assets
  - Credit
  - Other
  - Income Calculator

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Need to Know Before Submitting 410-4

- Have the most up to date copy of the 410-4 by downloading from eForms
- Do not use punctuation on the form.
- Do not use hyphens or slashes in SSN or DOB fields
- Do not click on any co-applicant fields
- Double and triple check information on the form before you submit (i.e. spelling, ID information and DOB)

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Login to eForms

- Navigate to the eForms login page you bookmarked

- Login to your eForms account
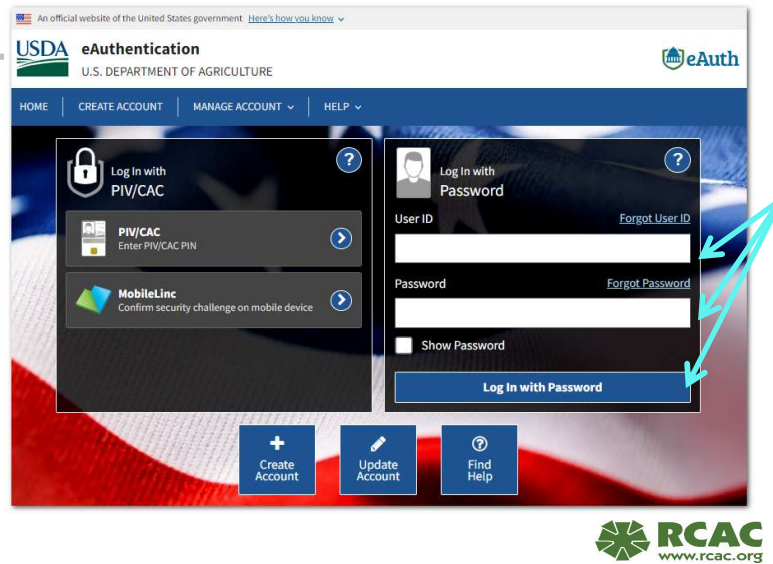
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Download and Complete 410-4

- Click on Browse Forms

⭐ ****Tip: If you only need to get the 410-4 and you are not ready to submit the package in eForms, you are not required to login to gain access to Browse Forms. Please see the handout for the link to that page.**

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Find Form

- Enter 410-4 into the Form Number Field

- Click Search

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Export Icon

- Click export icon to download the form to your computer

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Open File

- In the downloads box in the right-hand corner of Edge click on Open File under the form you just downloaded
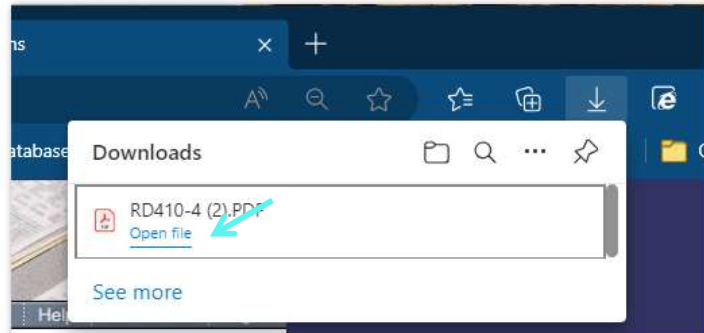
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Save 410-4 to Computer

- Click File

- Click Save AS
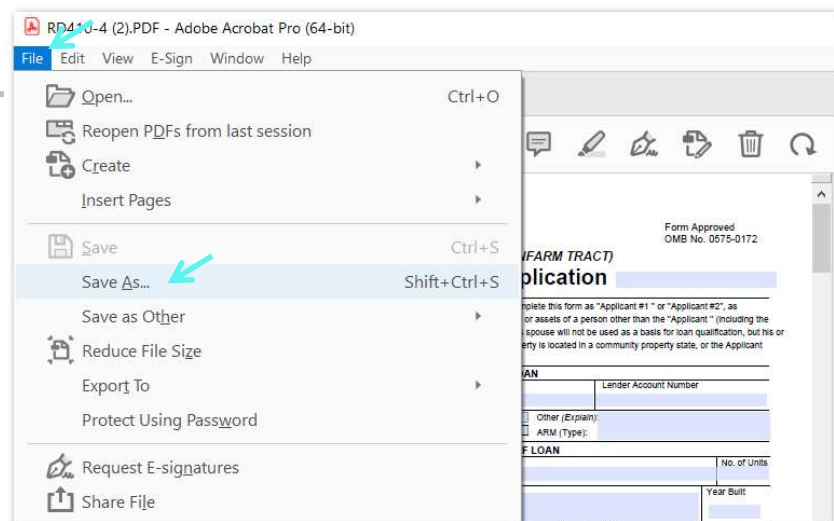
28

Choose Folder
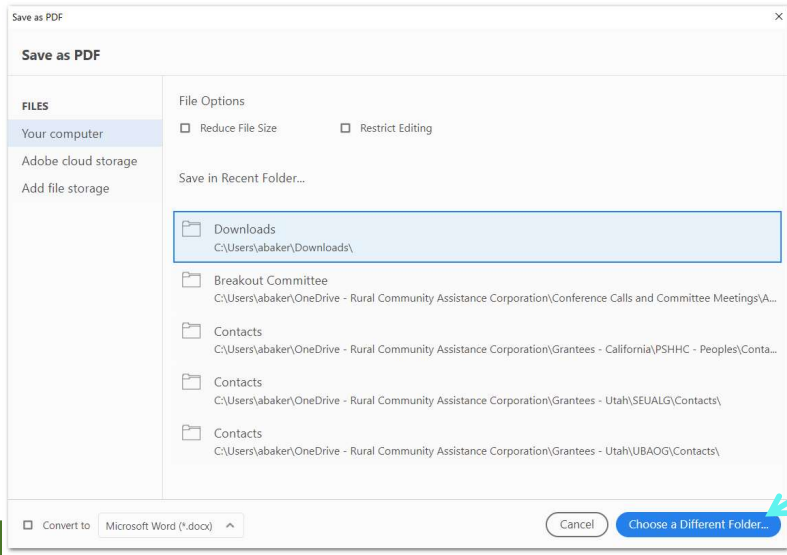
- Click on Choose a Different Folder

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Locate Folder, Name & Save File

**Tip: Use a similar naming convection to:
Last Name, First Name - 410-4 – Self Help**
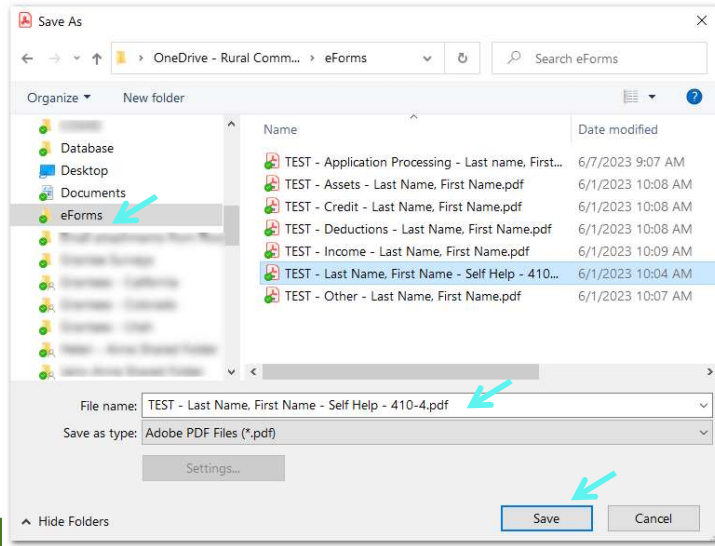
- Locate the folder you would like to save it in.

- Name the File

- Click Save

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Complete 410-4

- Complete Mortgage Applied for choice
- Skip to Purpose of Loan & Property will be Sections
- Skip to Title will be held in what Name field
- Continue filling out the form through page 8

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Import External Form

- Import External Form

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Import External Form

You are here: Home / Import Form

Import External Form

This import facility allows specially prepared eForms forms to be imported from your personal computer after they have been edited off-line. The following list of forms may be imported, if th are the correct revision:

Importable Forms List
CCC 802
NRCS-CPA- 41
NRCS-CPA- 41A
RD 410-4
RD 3555-16

Please select the form you wish to import by using the browse and then click on the add button import the form into your Saved Forms area.

PDF File: [Choose File] TEST - Last...p - 410-4.pdf
Saved Form Name: TEST - Borrower Name - 410-4 - Self Help

[Add]

Open dialog

« OneDrive - Rural ... › eForms   Search eForms

Organize ▾   New folder

Name	Date modified
Submitting Packages in eForms.pptx	6/7/2023 8:41 AM
TEST - Application Processing - Last name, First Name.pdf	6/1/2023 10:09 AM
TEST - Assets - Last Name, First Name.pdf	6/1/2023 10:08 AM
TEST - Credit - Last Name, First Name.pdf	6/1/2023 10:08 AM
TEST - Deductions - Last Name, First Name.pdf	6/1/2023 10:08 AM
TEST - Income - Last Name, First Name.pdf	6/1/2023 10:09 AM
TEST - Last Name, First Name - Self Help - 410-4.pdf	6/1/2023 10:04 AM
TEST - Other - Last Name, First Name.pdf	6/1/2023 10:07 AM
TEST - Worksheet for Computing Income - Max Loan Calc...	6/1/2023 10:13 AM

File name: TEST - Last Name, First Name - Self H   All files (*.*)

[Open]   [Cancel]

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Create Package

- Click on Create Page

You are here: Home / Saved Forms

Saved Forms

These are the forms you have previously saved. They may be edited or deleted. When creating custom packages, you may choose from any of these forms to fill the package.

Name	Status	Created	Actions
⊞ TEST - Borrower Name - 410-4 - Self Help	Active	06/07/2023	🖉 ✕

eForms
▹ Browse Forms
Workspace
▹ Create Package
▸ Saved Forms
▹ Saved Packages
▹ Import External Form
Inbox

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Custom Package

- Click Create Package then Custom Package

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ADD 410-4

- Click on check box next to the 410-4 that you saved

- Click Continue

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Name Package

You are here: Home / Create Package / Custom Package / Name Package

Create Package

Please enter a unique name for this package.

Package Name: Borrower name - Self Help - Group Name

USDA Receiving Agency: Rural Development

Create Package

Tip: Use a similar naming convection to:
Last Name, First Name - Self Help – Group Name

This will help the RD Office identify that it is a Self-Help File

- Name the Package

- Click Create Package

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Action Button

You are here: Home / Saved Packages

Saved Packages

These are the packages you have previously saved. You may submit ☐ or delete ☒ these packages, and if you open them up you may add, edit or delete the forms they contain. You open packages by clicking on their name.

Name	Last Updated	Agency	Actions
Borrower Name - Self Help - Group Name	06/01/2023	RD	☐ ☒
Sample Self Help Agency2	12/22/2021	RD	☐ Submit
Test Borrower name - Self Help - Group Name	06/07/2023	RD	☐ ☒

- Click Action button for the borrower's file to start submission process

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Choose Servicing Center

- Click on the appropriate State

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Choose County

- Choose the county that your service center is located in.

⭐ ****Important to know: Be sure to check with your loan specialist about which office you need to choose for your servicing center. Many state RD offices send all loan packages to one servicing center then the packages are disbursed from there.**

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Select your service center

- Select your Service Center

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Add Attachments

- Click Add in the Attachments Section
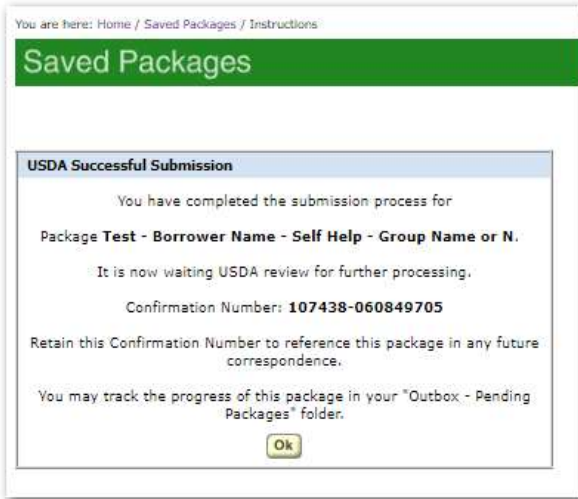

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Repeat Process & Submit

- Repeat the process adding them in the order shown here or in the order your specific RD office wants them.
- Add any comments you'd like to add
- Click Submit

**Tip: Suggested Attachment Order

- Application Processing
- Income
- Deductions
- Assets
- Credit
- Other
- Income Calculator

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Submission Confirmation

You are here: Home / Saved Packages / Instructions

Saved Packages

USDA Successful Submission

You have completed the submission process for

Package **Test - Borrower Name - Self Help - Group Name or N.**

It is now waiting USDA review for further processing.

Confirmation Number: **107438-060849705**

Retain this Confirmation Number to reference this package in any future correspondence.

You may track the progress of this package in your "Outbox - Pending Packages" folder.

[Ok]

- Be sure to print or print to PDF the page with your confirmation and place in the borrower's loan file.

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Email Confirmation

- Print or Save to PDF and put in Borrower's loan file

eForms Package 107438-060849705 Submittal

eFormsManager@one.usda.gov
To Anne Baker
Thu 6/8/2023 7:41 AM

You don't often get email from eformsmanager@one.usda.gov. Learn why this is important

Angela Baker

Package 107438-060849705 was successfully submitted on Thursday, June 8th, 2023 at 9:41am to:

DELTA SERVICE CENTER
690 INDUSTRIAL BLVD
DELTA, CO 81416-2812

It is now pending a review for completeness. You will be notified further once this has been done.

Please do not respond to this email, as it was automatically generated by the eForms system.

eForms Automation

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Questions, Support or Access Problems

SITE	PHONE	FAQS
eForms	1-800-457-3642 Option 2	N/A
eAuth	1-800-457-3642 Option 1	eAuthentication (usda.gov)

If you have questions about a specific loan package you have submitted, please contact your local RD office.

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