

# eForms User Guide

---

March 2020

# Table of Contents

## Chapter 1: Introduction

## Chapter 2: Applicants, Certified Loan Application Packagers, Approved Intermediaries, and Others

<b>Help Resources</b> .....	<b>5</b>
<b>Overview– Submitting the Electronic Loan Application</b> .....	<b>5</b>
<b>Step-by-Step Screenshots</b> .....	<b>7</b>
<b>Inbox</b> .....	<b>12</b>
<b>Returned Packages</b> .....	<b>13</b>
<b>Received Packages</b> .....	<b>14</b>
<b>Outbox</b> .....	<b>14</b>
<b>Pending Packages</b> .....	<b>14</b>
<b>Completed Packages</b> .....	<b>14</b>

## Chapter 3: RD Field Office Users

<b>Help Resources</b> .....	<b>16</b>
<b>Gaining Access to eForms</b> .....	<b>16</b>
<b>Overview– Processing the loan application in eForms</b> .....	<b>16</b>
<b>Reviewing the Loan Application Package in eForms</b> .....	<b>18</b>
<b>Step-by-Step Screenshots</b> .....	<b>20</b>
<b>Parsing the 410-4 Application in UniFi</b> .....	<b>23</b>
<b>Finishing Touches</b> .....	<b>29</b>
<b>Mapping Exceptions</b> .....	<b>30</b>
<b>Reports</b> .....	<b>31</b>

# Chapter 1: Introduction

The eForms site is used for a variety of United States Department of Agriculture (USDA) programs and purposes. Chapter 2 of this guide focuses on the basic steps required to submit a Single Family Housing (SFH) direct loan application package electronically using the eForms site. Chapter 3 of this guide focuses on the steps required of Rural Development (RD) Field Office users to import the SFH direct loan application package electronically into UniFi using the eForms site.



Approved intermediaries are required to submit applications electronically using the eForms site. To help them meet this requirement, each state must be prepared to accept and process applications using the eForms site. The first step towards establishing a working eForms process is to **establish a line of communication between intermediaries and RD State and Field Offices! State and Field Offices should determine and communicate the processing structure within the state to the intermediaries in order to correctly receive and timely process packages.**

If you have suggestions how we can improve this guide, please send us an email with your comments to: [SFHDIRECTPROGRAM@usda.gov](mailto:SFHDIRECTPROGRAM@usda.gov).

Thank you,  
The National Headquarters Direct Program Staff

## Link to the eForms site:

<https://forms.sc.egov.usda.gov/eForms/welcomeAction.do?Home>

## The eForms site to UniFi Interface

The eForms site allows applicants and individuals working on behalf of the applicant through approved entities (such as certified loan application packagers or approved intermediaries) to search for and complete forms requesting services from USDA, RD.

With the eForms site, users can electronically submit a SFH direct loan application package which includes all the items needed by RD to determine applicant eligibility (e.g. pay stubs, bank statements, etc.). Users can also upload a uniform residential loan application from their loan origination system to the eForms site. By transmitting applications this way, loan application packages will be received in a more timely and confirmed manner. In addition, RD staff will be able to import the uniform residential loan application information from the eForms site directly into the SFH direct loan origination system (UniFi).

# Chapter 2: Applicants, Certified Loan Application Packagers, Approved Intermediaries, and Others

How to Submit a Single Family Housing Direct Loan Application Package Using the  
eForms Site

---

## Help Resources



Before you use the eForms site to submit any applications, we first recommend contacting our **RD State Office**. Let us know you are interested in SFH direct loan application packaging and our staff will help guide you through the eForms process and answer any questions you may have. You can find your State Office using the following link:

<https://www.rd.usda.gov/contact-us/state-offices>

If you experience problems of a technical nature with the eForms site, you can contact the RD Help Desk by calling 1-800-457-3642, select USDA Applications (press 2), then select Rural Development (press 2). Alternatively, you may send an email to [RD.HD@USDA.GOV](mailto:RD.HD@USDA.GOV).



To submit an online application using the eForms site, the user must have a USDA **eAuthentication** account.

Access to submit packages through the eForms site requires a USDA eAuthentication account with a verified identity. If you do not have an eAuthentication account go to <https://www.eauth.usda.gov/eauth/b/usda/registration>. When your account is created then follow the process to verify your identity. For information on USDA eAuthentication accounts visit the [USDA eAuthentication FAQs](#).

## Overview– Submitting the Electronic Loan Application

The user starts the process by logging into the eForms site, browsing to the RD 410-4 loan application. At this point there are options to either complete the loan application directly within eForms **or** upload an existing application from another loan application system (provided it is compatible with the eForms site).



Users working for an approved intermediary who are submitting applications on behalf of an applicant or certified packager **MUST** submit the loan application in the eForms site using one of the two methods above.

Intermediary should confirm the processing structure with the State and Field Offices prior to submitting, in order to determine the correct location to submit the package. Some states have a central office to submit all packages regardless of the county in which the applicant is wanting to purchase, as mention below.

When a user with an eAuthentication account completes the RD 410-4 loan application, they have the option to submit it electronically. Upon clicking “submit”, they will be prompted to name their loan application package, select the ‘servicing center’ (a.k.a. Field Office) that will receive

the package based on the county in which the applicant is wanting to purchase, and attach the documents as required by [HB-1-3550 Attachment 3-J for 502 Direct](#) or [HB-1-3550 Attachment 12-E for 504 Direct](#) to complete the loan application package.



In addition to the documents listed in [HB-1-3550 Attachment 3-J for 502 Direct](#) or [HB-1-3550 Attachment 12-E for 504 Direct](#), packaged loan applications should include the cover letter and **disclosure letter** from [HB 1-3550 Attachment 3-A](#) with the package as well as a **completed spreadsheet showing income calculations/payment assistance**. Packaged loan applications should also **include a typed narrative in the comments section** (or attached as a supporting document) which discusses the applicant's eligibility criteria. This narrative should include income, credit and any other information that RD staff should consider for the packager's recommendation.

When "submit" is selected the second time, the loan application package is sent! If the transmission is successful, the user will receive a confirmation and the package will be moved to the users outbox on the eForms site (described later).



RD staff **will not** accept an application unless it is **COMPLETE**. If any documents are determined missing or incomplete during the review by RD staff, the package will be returned to the user. This applies to all applications, whether submitted by a loan application packager or applicant. **A 410-4 application submitted via the eForms site is acceptable; a signature on a 410-4 is not required for the application to be deemed complete.**

### Quick Guide

**Step 1. Navigate to the eForms site:**

<https://forms.sc.egov.usda.gov/eForms/welcomeAction.do?Home>

**Step 2. Login to the eForms site**

**Step 3. Select Browse Forms from the menu options**

**Step 4. At the Form Number search option, enter "410-4"**

**Step 5. Open (double click) the "RD 410-4 "OR**

**Select "Upload 1003 Form"**

**Step 6. Complete the RD 410-4 (if not uploaded) and click "Submit"**

**Step 7. Name your package and select the county/RD Office combination that will receive the application (as directed by your RD contact)**

**Step 8. Attach documents required to compete application**

**Applicants:** HB-1-3550 Attachment 3-J for Section 502 or HB 1-3550 Attachment 12-E for Section 504

**Packagers:** HB-1-3550 Attachment 3-A, Attachment 3-J or Attachment 12-E, and documentation showing income calculations/payment assistance. Attach documents as described in the “**Stacking Order Checklist**” available on the [Single Family Housing Direct Loans Application Packagers page](#).

**Step 9: Provide additional comments**

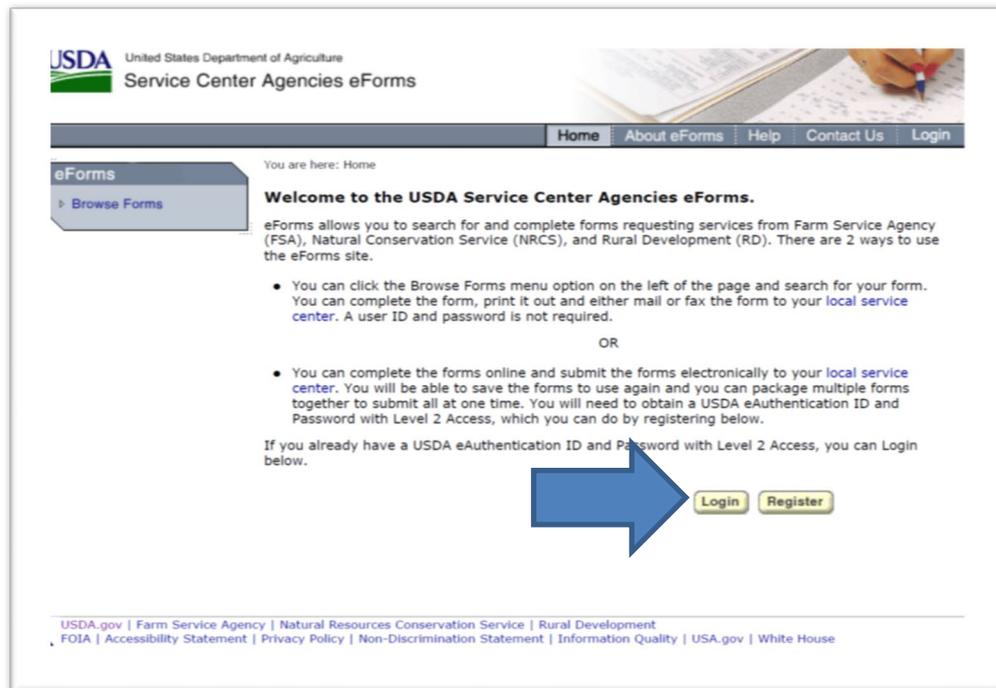
**Applicants:** Optional

**Packagers:** Typed Narrative

**Step 10: Click “Submit”...and that’s it!**

## Step-by-Step Screenshots

**Steps 1 & 2:** Navigate and Login to the eForms site.



**Step 3.** Select “Browse Forms” from the menu options.

USDA United States Department of Agriculture  
Service Center eForms Administration

Home About eForms Help Contact Us Logout

You are here: Home

**eForms**

- ▶ Browse Forms
- Workspace
  - ▶ Create Package
  - ▶ Saved Forms
  - ▶ Saved Packages
- Processing
  - ▶ Inbox
  - ▶ Outbox
  - ▶ Completed
  - ▶ Returned
  - ▶ Package Requests
  - ▶ Reports

**Welcome to the USDA Service Center eForms.**

You may simply browse the forms or you may complete the forms online.

Forms available on eForms are provided in Adobe Portable Document Format (PDF). To view these forms you need to download the free Adobe Reader, from Adobe Systems Inc.

USDA.gov | Farm Service Agency | Natural Resources Conservation Service | Rural Development  
FOIA | Accessibility Statement | Privacy Policy | Non-Discrimination Statement | Information Quality | USA.gov | White House

**Step 4:** At the Form Number search option, enter “410-4”.

USDA United States Department of Agriculture  
Service Center Agencies eForms

Home About eForms Help

You are here: Home / Browse Forms Search

**Browse Forms**

You may search for a form by completing any of the fields below or just click Search for all forms.

Agency Name: All

Program Name: All

Service Name: All

Form Number: 410-4

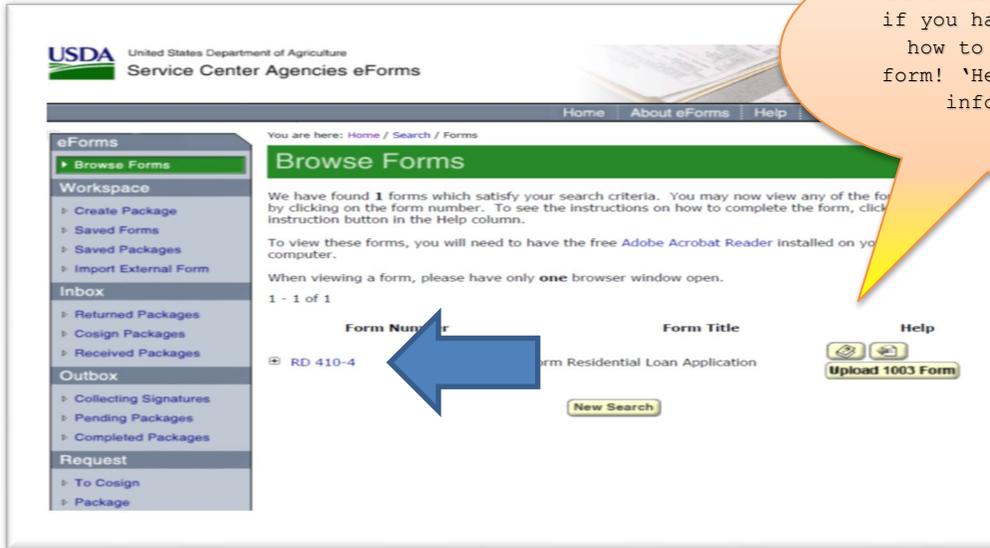
Title or Keywords:

Show Results: 10 Per Page

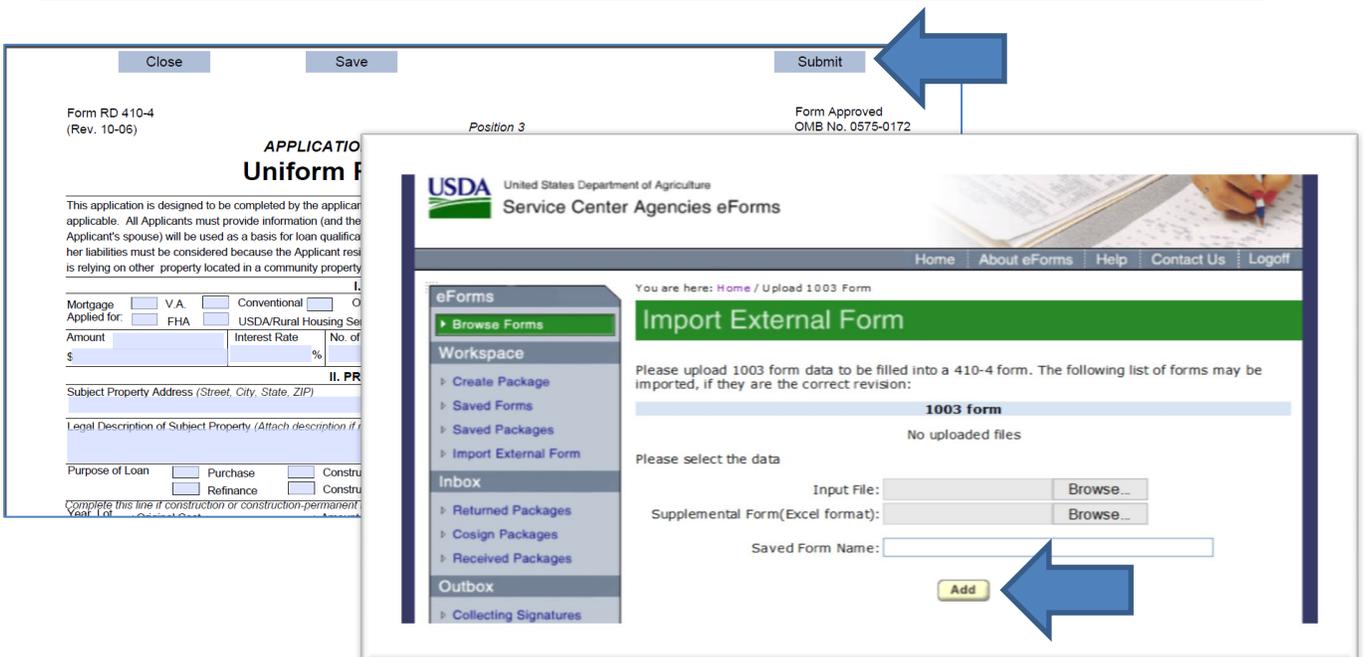
Search

You must use the 410-4 form provided in the eForms site. Other source versions of the 410-4 will not upload or transmit correctly.

**Step 5:** Open (double click) on the “RD 410-4” **OR** select “Upload 1003 Form”.



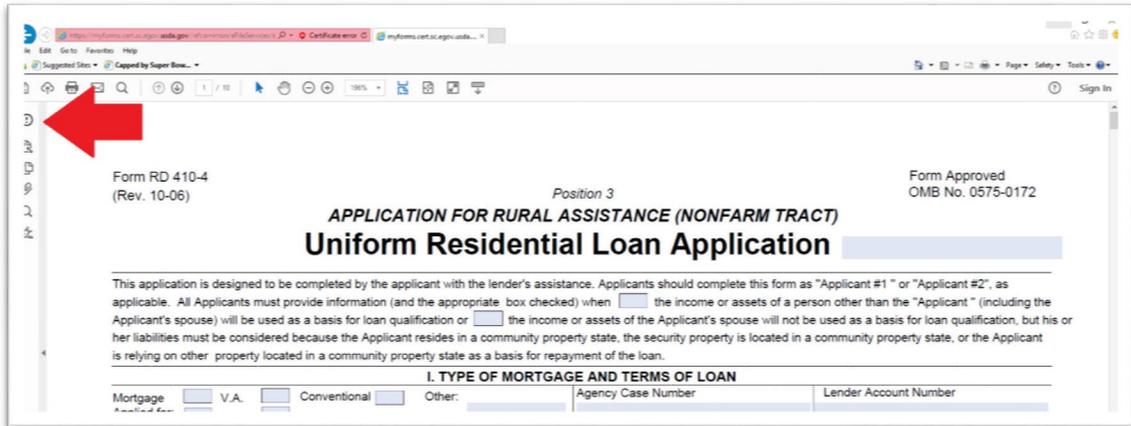
**Step 6:** Complete the 410-4 form and click “Submit”. If the “Upload 1003 form” button was selected earlier, the user would first browse their local input files (.prn), select the file to upload, and click “Add”.



## Step 6 Acrobat Reader DC Troubleshoot:

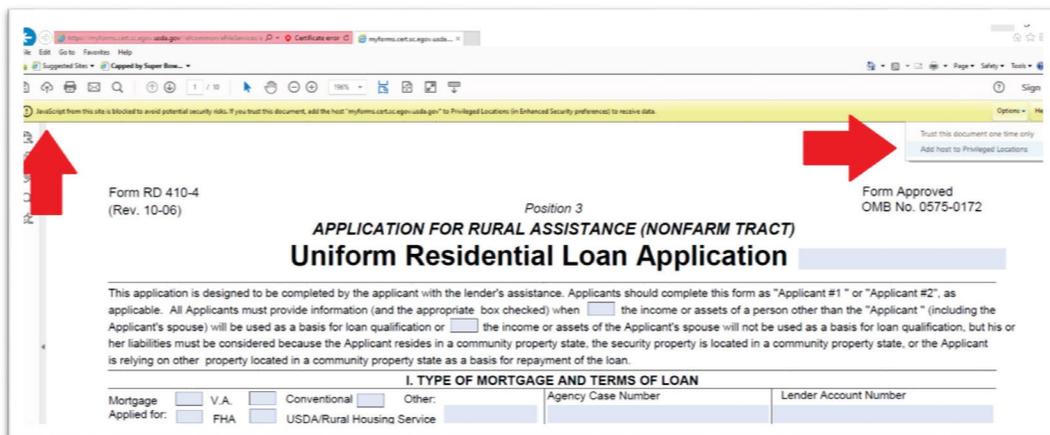
If you do not see Close, Save, and Submit buttons at the top of the 410-4 document, follow these steps.

1. Click on the warning icon  in the top left column.

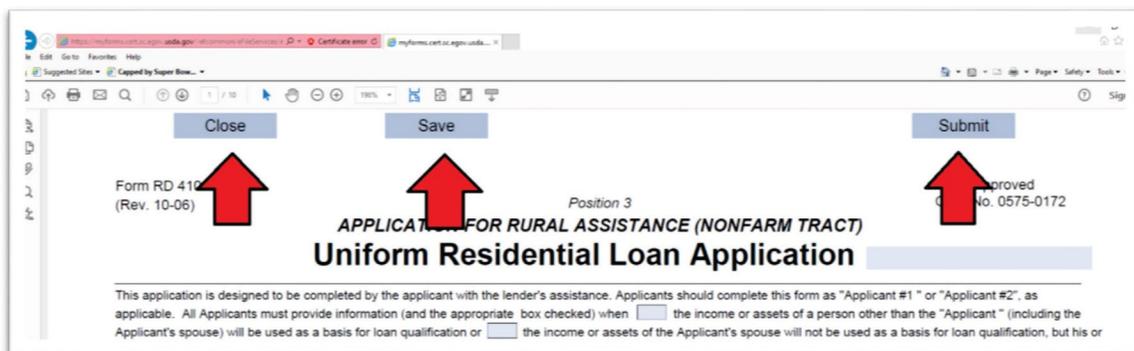


Clicking the icon will create a yellow bar on the top that says Javascript from this site is blocked to avoid potential security risks.

2. Click "Options" and then select "Add host to Privileged Locations"



You should now see the action buttons



**Step 7:** Name your package (not shown) and select the appropriate geographical county and then the USDA servicing center.

Not all offices accept eForms applications! Please contact RD staff prior to submitting your package so you know the right county/servicing selections to choose!!!

Name	Address	Action
ARKANSAS USDA STATE OFFICES	700 W CAPITOL AVE STE 3416 LITTLE ROCK AR, 72201-3215	Select Map
JONESBORO SERVICE CENTER	3407 S CARAWAY RD JONESBORO AR, 72404	Select Map

**Steps 8, 9, & 10:** Attach supporting application documents, provide narrative and any additional comments, and submit.

Forms

Name	Description
test410-4Import	This form is to be completed by anyone wishing to apply for a Rural Housing loan or grant.

Attachments

Name	Description	Action
There are currently no attachments for this package.		

If you would like to provide the service center with any comments on this package, please enter them here:

Add comments here....

Your USDA eAuthentication account email address is [karl.kelley@stl.usda.gov](mailto:karl.kelley@stl.usda.gov). All notifications pertaining to this package will be sent to this email address. If this is not the address you wish to have used, you must change it through the USDA eAuthentication. Any changes to your eAuthentication profile will require that you log out of eForms and back in again to take affect.

You have selected the following service center:

Service Center: ST LOUIS GOODFELLOW BLVD COMPLEX  
4300 GOODFELLOW BLVD  
ST LOUIS, MO 63120-1700  
Phone Number: 3144574800

Submit



**The ‘Add’ option is what the user selects to add the application supporting documents** as described earlier. The supporting documents must be sent along with the electronic submission of the uniform residential loan application, not separately. **When submitting a package using the eForms site, a signature on the 410-4 is not required.**



**Loan application packagers must provide a narrative in the comments section** (or use the ‘Add’ feature to attach as a supporting document) which discusses the applicant’s eligibility criteria. This narrative should include income, credit, and any other information that RD staff should consider for the packager’s recommendation.

**That’s it!** You will receive a confirmation message and the application package will be moved to your Outbox.

**USDA Successful Submission**

You have completed the submission process for  
Package **RD410-4\_05-09-2016\_08-38-34**.

It is now waiting USDA review for further processing.

Confirmation Number: **105195-050920480**

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.



Users are advised to print the screen with the confirmation number and save in their file.

## Inbox

The Inbox menu area of the eForms site contains three actions; they are Returned Packages, Cosign Packages, and Received Packages. In most cases, the user will only be concerned with Returned Packages and Received Packages.

## Returned Packages

**JSDA** United States Department of Agriculture  
Service Center Agencies eForms

Home About eForms Help Contact Us Logoff

You are here: Home / Returned Packages

### Returned Packages

These are your packages that have been returned from a Service Center. To determine the reason the package was returned, click on the confirmation number to view the contents of the package. After the necessary modifications are made, you can resubmit the package by clicking the resubmit button. If you need to add an attachment or comments to the package, you will be able to do this after you click the resubmit button.

Confirmation #	Name	Status	Actions
<a href="#">63495-081912743</a>	<a href="#">Test Pkg 54</a>	Returned	

The Returned Packages area contains a list of packages that have been returned by the USDA. The details of each package may be viewed by clicking on the “Confirmation #” or “Name”.

### Returned Packages

These are the forms that are contained by package **63495-081912743**. To determine the reason this package was returned, click the Reason button below. You can view each form by clicking on the form name. You can then make the necessary changes and click Save. You can add another form to the package, by clicking the Add button or you can delete a form by clicking the delete button.

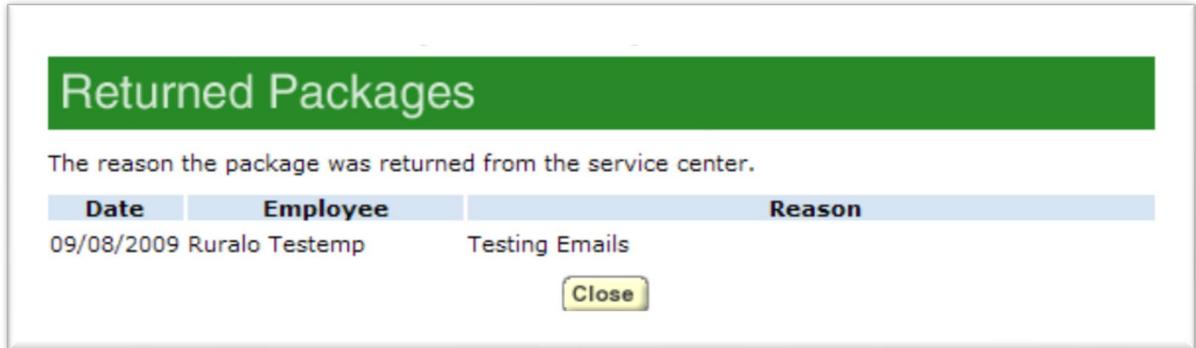
Name	Status	Create Date	Actions
<a href="#">test 3550-1</a>	Active	09/08/2009	

[Add](#) [Reasons](#) [Close](#)

The detail view contains the following actions:

- Standard Package Item actions.
  - Expand – The icon allows you to display more details about this saved form.
  - The “Name” is a link to the saved PDF and data. Selecting the link will load the form and data in the current browser window.
  - The icon will delete the item.

- The  icon opens a new browser window containing detailed help instructions about the form.
- The  button displays a page of reasons for the return.



## Received Packages

The Received Packages area contains a list of packages that were originated by a Federal Employee representative of Farm Service Agency, Natural Resources Conservation Service, or RD.

## Outbox

The Outbox menu area contains three actions; they are Collecting Signatures, Pending Packages, and Completed Packages. In most cases, the user will only be concerned with Pending and Completed Packages.

### Pending Packages

The Pending Packages area provides a package list of open package submissions. Open package submissions are packages that are:

- New – a submitted package that has not been opened by a USDA employee.
- Pending – a submitted package that has been opened by a USDA employee.
- Redirected – a submitted package that has been forwarded to another servicing location for processing.

A pending package can be viewed, but editing is not allowed.

### Completed Packages

The Completed Packages area contains a package list view of all submitted packages that have been accepted. The term “Accepted” only means that information contained in the package was sufficient to allow further processing of the request and may or may not require signed printed copies of the electronic forms to be submitted.

# Chapter 3:

## RD Field Office Users

How to Upload the Single Family Housing Direct Loan Application Package into UniFi Using the eForms Site

---

## Help Resources

If you experience problems of a technical nature with the eForms site to UniFi upload, you can contact the RD Help Desk by calling 1-800-457-3642, select USDA Applications (press 2), then select Rural Development (press 2). Alternatively, you may send an email to [RD.HD@USDA.GOV](mailto:RD.HD@USDA.GOV).

If you have non-technical issues (i.e. program related questions) regarding the eForms site to UniFi upload, please contact your State Office.



To retrieve an online application in eForms, the Field Office user must have access to the appropriate office location in the eForms site.

## Gaining Access to eForms

Field Office users should be able to access the eForms site using their existing eAuthentication credentials. If you are unable to access the eForms site, please contact your state's Information Security System Staff Point of Contact (ISSSPOC). Your ISSSPOC will need to submit a ticket into the User Access Management (UAM) System in order for you to gain the necessary access.

## Overview– Processing the loan application in eForms

The Field Office user should receive a notification email whenever a loan application package is submitted to their Field Office through the eForms site. This notification should prompt Field Office staff to review the incoming package and based on their review, either accept, re-direct or return it.



If you do not receive a notification email then you are not properly assigned to the office that received the eForms application! If this occurs, please contact your state's SFH Program Director or designated eForms contact. They will work with National Headquarters staff to update the user profile.



In some cases, **ALL** individuals working in the Field Office may receive the notification email, including non-SFH personnel. Please communicate with the other staff members in your office so they are aware of this possibility.

An automated process uploads all accepted loan application packages from the eForms site into UniFi. This task is scheduled to run every 10 minutes with additional tasks occurring behind the scenes. The application should become available in UniFi within 30 minutes from being accepted in the eForms site. When an employee logs on to UniFi, a pop-up of all the RD 410-4 loan applications accepted for that Field Office will be displayed on a screen (this process is similar to the one displayed when credit reports have been received in UniFi).

The employee will then select a RD 410-4 loan application and begin ‘parsing’ the application. Parsing an application, ensures the data transmitted is sent to the correct UniFi fields.

### Quick Guide

**Step 1. Navigate to the eForms site.**

**<https://forms.sc.egov.usda.gov/eForms/welcomeAction.do?Home>**

**Step 2. Login to the eForms site.**

**Step 3. Go to inbox and identify ‘new’ packages.**

**Step 4. Review the package. Open (double click) the package and review ALL attached documents.** For packagers, documents should be attached as described in the “Stacking Order Checklist” document available on the **[Single Family Housing Direct Loan Application Packagers page.](#)**

**Step 5. Accept, Re-direct, or Return the package.**

- **ACCEPT ONLY COMPLETE PACKAGES! When the 410-4 form is submitted using the eForms site, a signature is not required on the 410-4 for the package to be deemed complete. The electronic 410-4 form submitted through the eForms site is acceptable.**
- Accepted packages will transmit to UniFi on the next upload.
- Re-directed packages will be sent to the inbox of the office selected.
- Returned packages will be sent to the inbox of the user and should include a detailed explanation why the package was returned.

**Steps 6 -13. Parse application into UniFi.**

## Reviewing the Loan Application Package in eForms

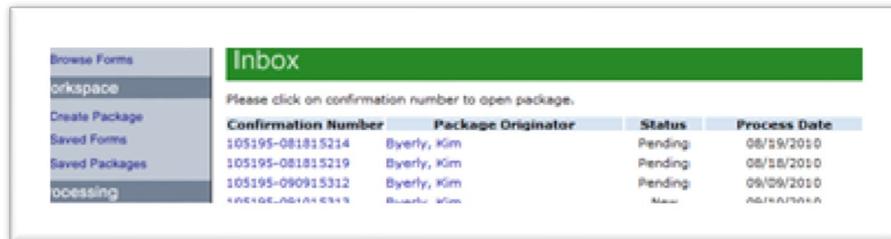
Loan application packages submitted through the eForms site rely on the Field Office user to frequently review their **Inbox** and to take the appropriate action. After a thorough review, the most common actions a Field Office user will take is to either **Accept**, **Re-direct**, or **Return** the application package.



The Agency **will not** “Accept” an application unless it is **COMPLETE**. Please refer to HB-1-3550, Chapter 3 or Chapter 12 for more information. If any documents are determined missing or incomplete during the review, the entire package is to be returned to the user. This applies to all applications, whether submitted by a loan application packager or applicant. When an application is submitted in the eForms site, a signature on the 410-4 is not required. The electronic 410-4 is acceptable for a complete application.

The **Inbox** area provides a list of open package submissions. Open package submissions are either:

- New – a submitted package that has not been opened by a USDA employee.
- Pending – a submitted package that has been opened by a USDA employee.

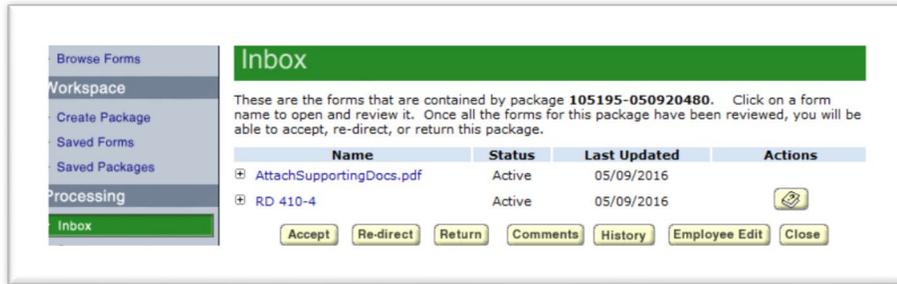


Inbox				
Please click on confirmation number to open package.				
Confirmation Number	Package Originator	Status	Process Date	
105195-081815214	Byerly, Kim	Pending	08/19/2010	
105195-081815219	Byerly, Kim	Pending	08/18/2010	
105195-090915312	Byerly, Kim	Pending	09/09/2010	
105195-090915313	Byerly, Kim	Pending	09/09/2010	



All the forms must be reviewed (i.e. opened and closed) in the package before any action to accept, re-direct, or return can be taken. Otherwise, you will receive an error message.

## Accepting, Re-directing, or Returning Packages.



When you **Accept** a package, it moves the package from the inbox to the **Completed** folder and notifies the UniFi system that it is ready for upload.

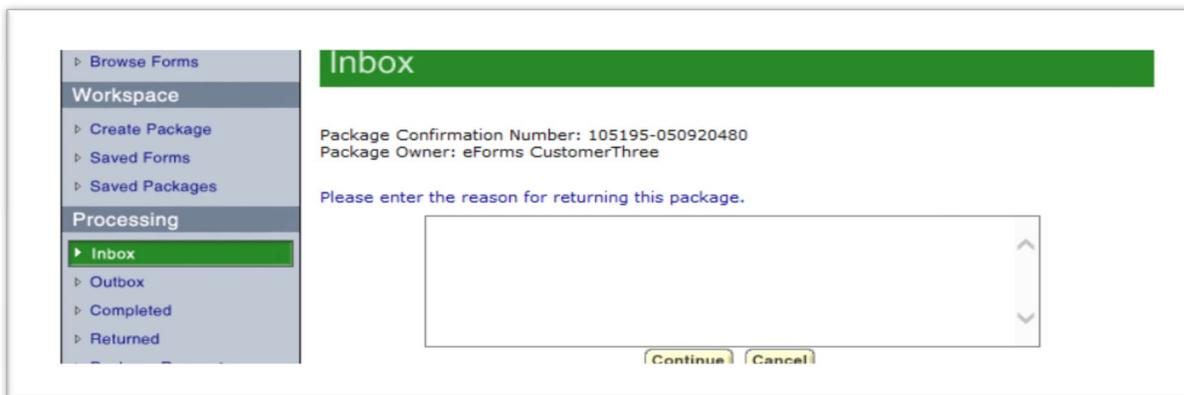


UniFi uploads accepted applications on a set schedule, so you will have to wait until the next upload is complete before you can parse the application in UniFi.

Field Office users also can choose to **Re-direct** a package. This allows the Field Office user to send it to another Field Office for processing. This is a useful option when a package was sent to the wrong office or if a state uses centralized processing and wants to re-direct the package internally.

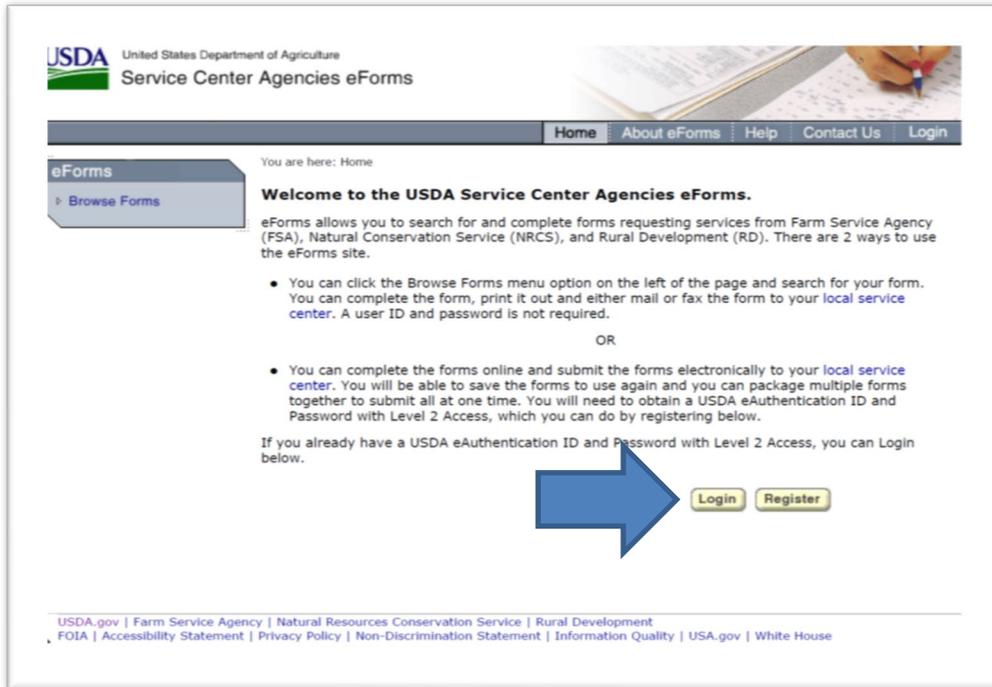
## Returning Packages.

If during the review, the application is determined incomplete, the Field Office users can **Return** the package. When this action is taken, the Field Office user should (in detail) describe the reason for returning the package. This action will send the package back to the **Inbox** of the user who originally submitted the package.

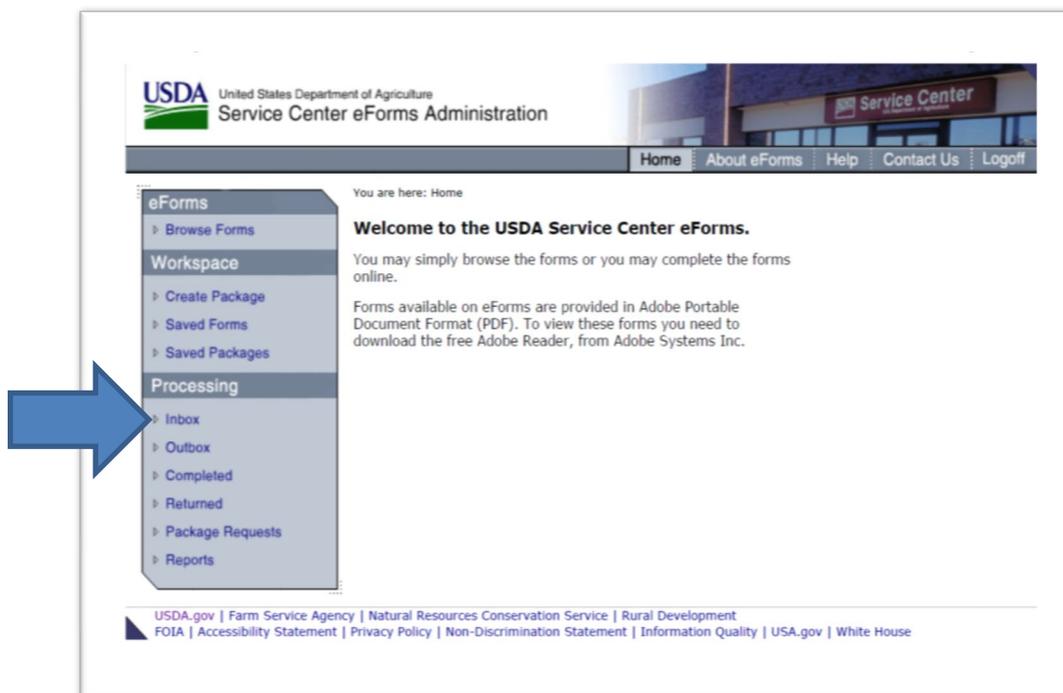


## Step-by-Step Screenshots

**Steps 1:** Navigate and Login to the eForms site.



**Step 2:** Select "Inbox" from the menu options.



**Step 3:** Identify any 'new' applications and open them.

USDA United States Department of Agriculture  
Service Center eForms Administration

You are here: Home / Inbox

**Inbox**

Please click on confirmation number to open package.

Confirmation Number	Package Originator	Status	Process Date
105195-081815214	Byerly, Kim	Pending	08/19/2010
105195-081815219	Byerly, Kim	Pending	08/18/2010
105195-090915312	Byerly, Kim	Pending	09/09/2010
105195-091015313	Byerly, Kim	New	09/10/2010
105195-091315335	Byerly, Kim	Pending	09/13/2010
105195-030420364	CustomerOne, eForms	New	03/04/2015
105925-030420365	CustomerOne, eForms	New	03/04/2015
105925-042920373	CustomerThree, eForms	New	
105195-042920374	CustomerThree, eForms	New	
105925-051220379	SCHWARZ, MARKUS	New	
105195-031020446	CustomerTwo, eForms	New	03/10/2016
102025-031020447	CustomerOne, eGovCust1	Pending	03/10/2016
102025-031020448	CustomerTwo, eForms	Pending	03/10/2016
102025-032320467	VENKATRAO, JYOTHIRANI	Pending	03/23/2016
105927-041820474	CustomerThree, eForms	New	04/18/2016
105927-050920478	CustomerThree, eForms	Pending	05/09/2016
105925-050920479	CustomerThree, eForms	Pending	05/09/2016
105195-050920480	CustomerThree, eForms	New	05/09/2016

USDA.gov | Farm Service Agency | Natural Resources Conservation Service | Rural Development  
FOIA | Accessibility Statement | Privacy Policy | Non-Discrimination Statement | Information Quality | USA.gov | White House

**Step 4:** Open (double click) on each form to review their contents. You must review **ALL** documents in order to complete the next step.

USDA United States Department of Agriculture  
Service Center eForms Administration

You are here: Home / Inbox / Items

**Inbox**

These are the forms that are contained by package **105195-050920480**. Click on a form name to open and review it. Once all the forms for this package have been reviewed, you will be able to accept, re-direct, or return this package.

Name	Last Updated	Actions
AttachSupportingDocs.pdf	05/09/2016	
RD 410-4	05/09/2016	

Accept Re-direct Return Comments History Employee Edit Close

USDA.gov | Farm Service Agency | Natural Resources Conservation Service | Rural Development

When submitting a package using eForms, a signature on the 410-4 is not required.

**Step 4 (cont.):** When the 410-4 application review is complete, be sure to close the form using the 'Close' action button in the upper left corner. This is slightly different than how you close out of other supporting documents. For those, the user can simply 'X' out of the tab.

Form RD 410-4 (Rev. 10-06) Position 3 Form Approved OMB No. 0575-0172

### APPLICATION FOR RURAL ASSISTANCE (NONFARM TRACT) Uniform Residential Loan Application

This application is designed to be completed by the applicant with the lender's assistance. Applicants should complete this form as "Applicant #1" or "Applicant #2", as applicable. All Applicants must provide information (and the appropriate box checked) when  the income or assets of a person other than the "Applicant" (including the Applicant's spouse) will be used as a basis for loan qualification or  the income or assets of the Applicant's spouse will not be used as a basis for loan qualification, but his or her liabilities must be considered because the Applicant resides in a community property state, the security property is located in a community property state, or the Applicant is relying on other property located in a community property state as a basis for repayment of the loan.

**I. TYPE OF MORTGAGE AND TERMS OF LOAN**

Mortgage Applied for:  V.A.  Conventional  Other:  USDA/Rural Housing Service  USDA Agency Case Number: 12345 Lender Account Number: 123456

Amount: \$ 145,000.00 Interest Rate: 5.5000% No. of Months: 360 Amortization Type:  Fixed Rate  Other (Explain):  GPM  ARM (Type):

**II. PROPERTY INFORMATION AND PURPOSE OF LOAN**

Subject Property Address (Street, City, State, ZIP): 616 Willow Street, Big Rapids MI, 49307

Legal Description of Subject Property (Attach description if necessary):

Purpose of Loan:  Purchase  Construction  Other (Explain): Property will be:

**Step 5:** Once all documents have been opened and reviewed, the user can either Accept, Re-direct, or Return the package. Accepting the package notifies the eForms site to transmit the 410-4 form to UniFi during the next upload.

USDA United States Department of Agriculture Service Center eForms Administration

You are here: Home / Inbox / Items

### Inbox

These are the forms that are contained by package 105195-050920480. Click on a form name to open and review it. Once all the forms for this package have been reviewed, you will be able to accept, re-direct, or return this package.

Name	Status	Last Updated	Actions
AttachSupportingDocs.pdf	Active	05/09/2016	
RD 410-4	Active	05/09/2016	<input type="button" value="Accept"/> <input type="button" value="Re-direct"/> <input type="button" value="Return"/> <input type="button" value="Comments"/> <input type="button" value="History"/> <input type="button" value="Employee Edit"/> <input type="button" value="Close"/>

----- Remaining steps are performed in UniFi -----

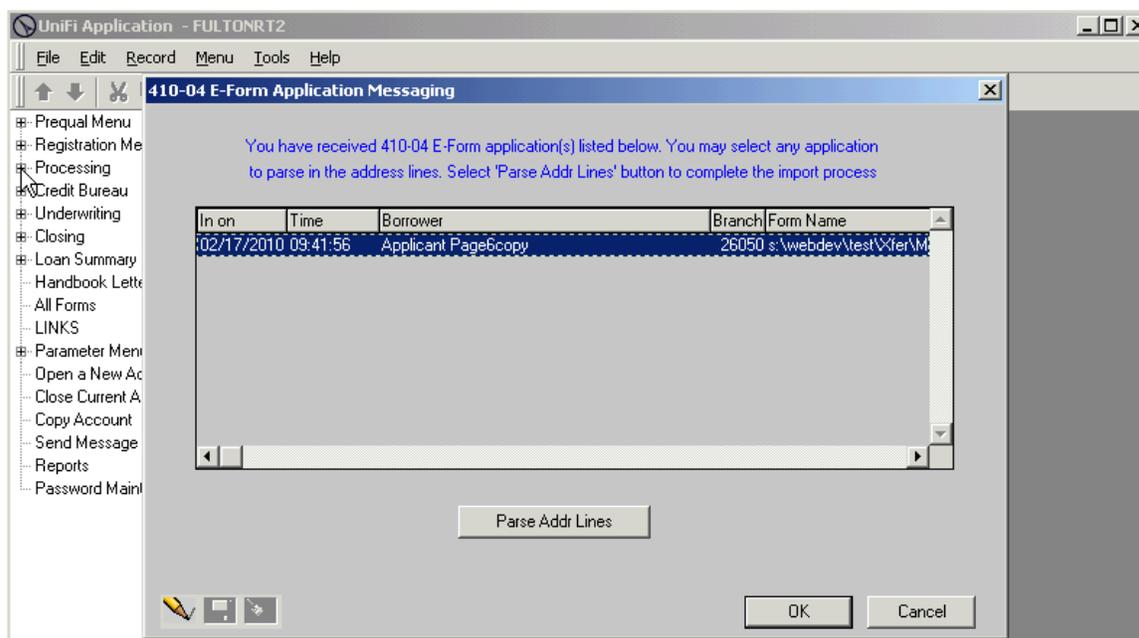


**To parse, the users UniFi ID must be identical to the code of the RD Field Office that accepts the application.** If a user has UniFi access that does not match the code of the ‘accepting’ Field Office, then the application will not display in Unifi to parse! **By default, Field Offices use a branch level code** based on their geographical county. However, this default can be changed to accommodate other access levels (e.g. statewide access). **States utilizing district or statewide UniFi access should contact the National Headquarters prior to accepting applications on the eForms site to ensure proper settings are in place.**

## Parsing the 410-4 Application in UniFi

The following are the steps taken to parse (map) data from Form RD 410-4 into UniFi.

**Step 6:** eForms applications waiting to be put into UniFi for a branch will be displayed when a user from that branch logs on to UniFi. Choose the Cancel button if you do not want to parse the application(s) at this time. The application(s) will be held in a special queue and can be accessed at a later time.

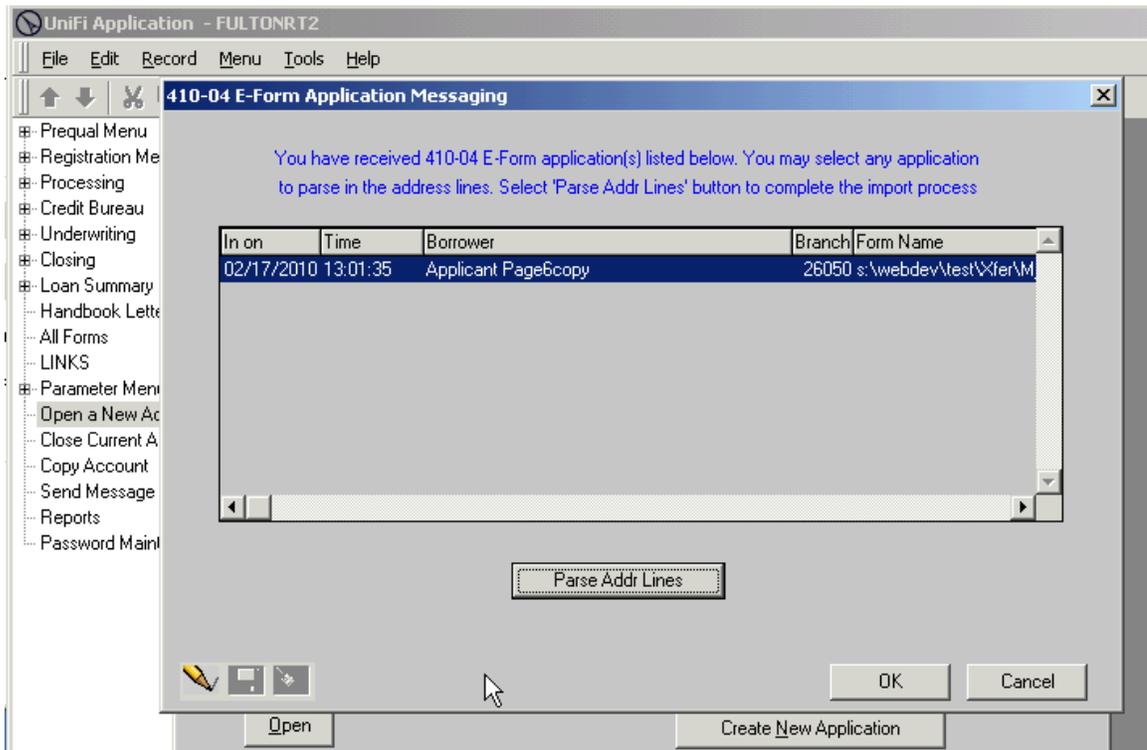


**Step 7:** When you are ready to parse an application previously bypassed at logon: Go to Open a New Account, select 13 E-Form Application Queue, then Open.

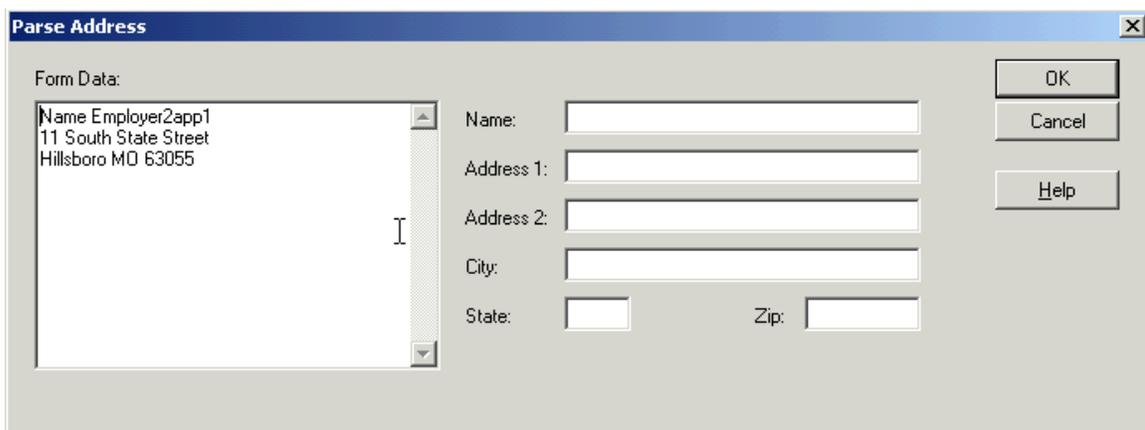
**NOTE:** Form RD 410-4's remain in the Queue until someone parses the application. If the application has been parsed since the original user logged on and bypassed the parsing screen, the original field employee will no longer be able to retrieve the application by accessing this process.

The screenshot shows the 'UniFi Application - FULTONRT2' window with a 'Select an Application' dialog box open. The dialog has a menu bar (File, Edit, Record, Menu, Tools, Help) and a toolbar. On the left is a tree view with 'Open a New Acc' selected. The dialog is split into two sections: 'Non Queue Access' and 'Take From Queue'.  
Under 'Non Queue Access':  
- Option 1: By Application (input: 0000000000)  
- Option 2: By Borrower (input: empty)  
- Option 3: By Social Security (input: 0000000000)  
- Option 4: By Property (input: empty)  
- Option 5: By Loan Analyzer ID (input: empty)  
- Option 6: Agency Case Nbr (input: empty)  
- Option 7: Origination System Nbr (dropdown: UniFi, input: empty)  
Under 'Take From Queue':  
- Option 8: My Queue (input: EMPLas143)  
- Option 9: My Secondary Queue (input: EMPLas143)  
- Option 10: Other Employee Queue (input: empty)  
- Option 11: Branch Queue (input: 26050)  
- Option 12: Pre Defined Queue (input: empty)  
- Option 13: E-Form Application Queue (input: 26050, selected)  
Buttons: 'Open' (highlighted), 'Create New Application', 'OK', and 'Cancel'. A status bar at the bottom says 'Select an option'.

**Step 8:** The 410-04 E-Form Application Messaging screen will appear with the applications waiting to be parsed. Highlight the account (if not already highlighted) and click “Parse Addr Lines” box.



**Step 9:** A pop-up screen, Parse Address, will appear for each address on the application. Enter the information (copy or type) from the left side of the screen labeled Form Data to the right side in the proper field (Name, Address 1, etc.).



**Step 10:** Click OK when each address has been parsed.

NOTE: If you select cancel on the Parse Address screen, the address on the left will not be entered into UniFi and the next address to be parsed will be displayed for parsing. Any address not parsed will need to be input manually into UniFi. If the Field Office address comes up for parsing; you do not have to parse this address. It will be automatically brought in when the Field Office is assigned on the Registration Screen.

Parse Address

Form Data:

- Name Employer2app1
- 11 South State Street
- Hillsboro MO 63055

Name: Name Employer2app1

Address 1: 11 South State Street

Address 2:

City: Hillsboro

State: MO Zip: 63055

OK

Cancel

Help

**Step 11:** Click OK when all addresses for an applicant have been parsed and the following message appears.

UniFi Application - FULTONRT2 - NEW APPLICATION - Loan Analyzer

File Edit Record Menu Tools Help

410-04 E-Form Application Messaging

You have received 410-04 E-Form application(s) listed below. You may select any application to parse in the address lines. Select 'Parse Addr Lines' button to complete the import process

In on	Time	Borrower	Branch	Form Name
08/31/2010	08:33:50	William Short	26050	s:\webdev\test\xfer\My
08/31/2010	08:33:23	William Employerfill	26050	s:\webdev\test\xfer\My

Message

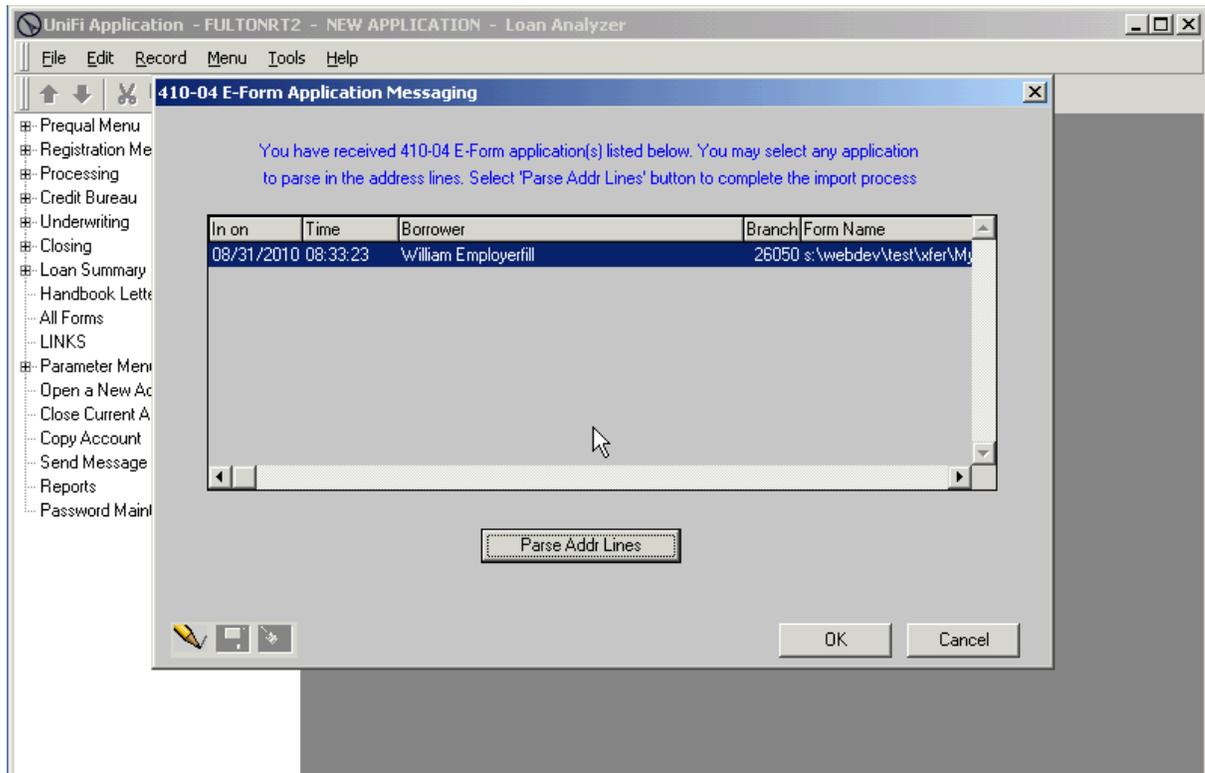
The import of s:\webdev\test\xfer\MyForms\2010-07-15\_13-45-30\_Item-14914-1.xml has been completed!

OK

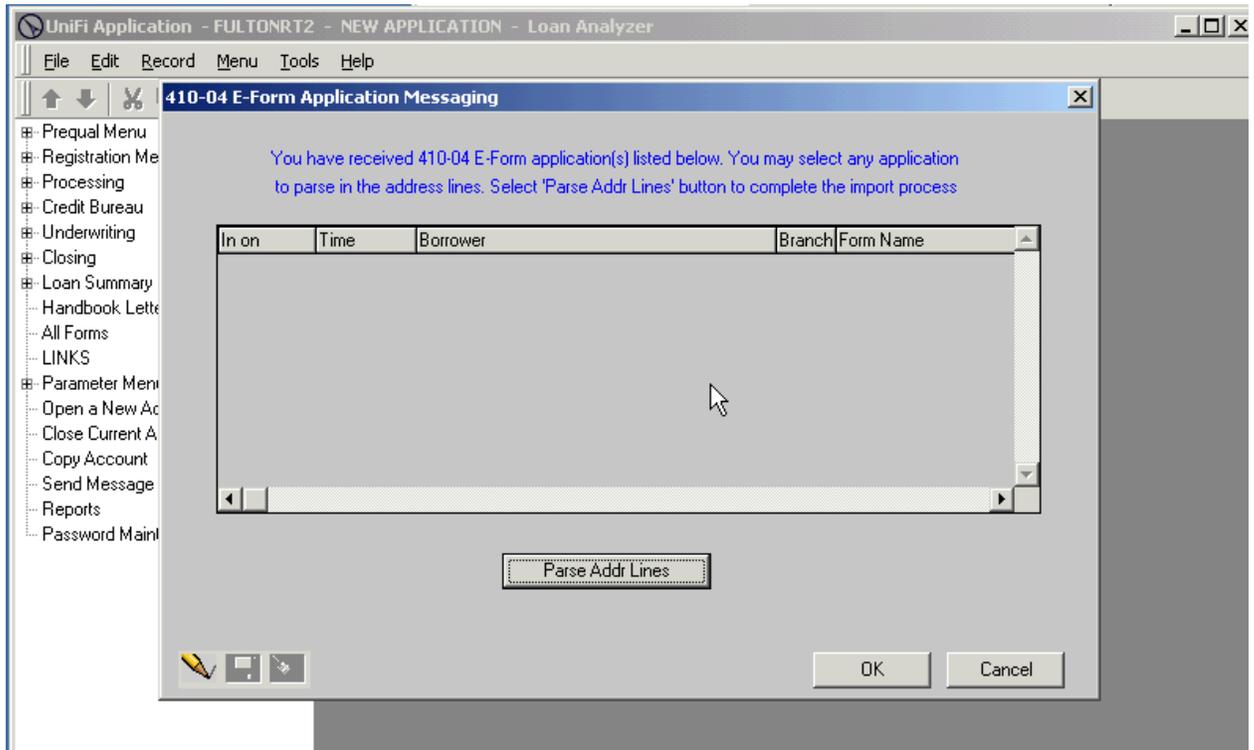
Parse Addr Lines

OK Cancel

**Step 12:** If there are additional applicants available to parse, the screen will display as shown below. Click “Parse Addr Lines” box to parse addresses for additional applicant(s) repeating steps #4 and #5 above. Click Cancel if you do not want to parse the application(s) at this time.



**Step 13:** Click OK on 410-04 E-Form Application Messaging screen when parsing applications is completed and there are no additional applicants to parse as shown below.



If you select Cancel and receive a pop-up “Changes have been made to this information. Cancel all changes? Yes No” – **ALWAYS SELECT NO.** If you click Yes all uploaded information will be lost and must be reentered manually from a copy of the printed form from the eForms site.



The last application parsed will be open in UniFi to enter additional information (e.g. program type, product, purpose code, etc.) to complete the application. Click on a Menu Item (e.g. Registration Menu, Registration Screen, etc.) to open the screens and complete the information for the newly parsed application.



If you choose to close the current application after parsing but before completing the application in UniFi, **make sure to deselect before closing account**. Deselect will put the application in your queue. UniFi stores the name as **\*\* New Account \*\*** and if the application is in your queue it may be easier to find. Otherwise, you will need to select the application by name (**\*\* New Account \*\***) or SSN.



If you closed an application after parsing (without completing the application) or parsed more than one application at a time, you can open parsed applications by selecting #9, My Secondary Queue, from the Select an Application pop-up and click on the In on button. This will sort the applications according to the most recent date and time entered. Parsed accounts where no additional work has been done will display as **\*\*NEW ACCOUNT\*\*** as shown below.

All Loans Active in Your Queue (EMPLas143)										
In on	Time	Borrower	Application Number	Branch	Stage	Exp Close Dt	Purp	Prod	Comments/Task	
02/25/10	3:11 PM	** NEW ACCOUNT **		? 26050	00		10 00000		Account Created New	
02/24/10	12:40 PM	Page6, Applicant		? 26050	00		00 00000		Opened Non Queue	
02/22/10	11:49 AM	Maxdata#copy, Testy	0070000479	18090		20 11/19/2004	20 00250		Opened Non Queue	
02/19/10	2:24 PM	** NEW ACCOUNT **		? 26050	00		40 00000		Opened Non Queue	
02/18/10	2:16 PM	** NEW ACCOUNT **		? 26050	00		40 00000		Account Created New	

## Finishing Touches

The applications can now be completed as regular non eForms applications. You will also need to review/complete the following items in UniFi:

- If a mailing address is entered on application; you need to go to the Borrower Information - Individual Screen (Processing, Supplemental Borrower Information, Borrower Information – Individual) and uncheck the box marked. This address is also the Mailing Address.
- If a second applicant is on the Form RD 410-4 they are automatically set as Note signer on the Household Member screen. In addition, the second applicant is set with Form #01 on the Borrower Information – Individual screen. Either of these may be changed in UniFi on their respective screens as the situation warrants but you need to change this information manually.
- All the assets and liabilities are mapped to the first applicant as there is no field on the form to indicate to which applicant these belong. Any of these fields can be changed manually to the second applicant or both when needed.



Some of the data entered in eForms on the Form RD 410-4 is not mapped to UniFi or may be updated in UniFi different than was input on the eForms site. Mapping exceptions are shown below by page number.

## Mapping Exceptions

### Page 1 of Form RD 410-4

- Interest Rate is mapped but may be changed when Expect to Close date is entered in UniFi.
- Manner in which Title will be held is not mapped.

### Page 2 of Form RD 410-4

- Net Rental Income is mapped from the Net Rental Income from the Schedule of Real Estate Owned section on page 4 of the Form RD 410-4 not from information entered in V. Monthly Income and Combined Housing Expense Information section.
- Proposed First Mortgage is mapped based on loan amount, term, interest rate in UniFi not from information entered in V. Monthly Income and Combined Housing Expense Information section.
- Other Line 1 for both applicants is not mapped from what is input on the form. It is computed in UniFi based on Monthly Income for other than the first employer.
- Describe Other Income section at the bottom of the page is not mapped.

### Page 3 of Form RD 410-4

- Real Estate Owned is mapped from the Present Market Value of the Schedule of Real Estate Owned section on page 4 of the Form RD 410-4 not from information entered in Assets column in VI. Assets and Liabilities section.

### Page 4 of Form RD 410-4

- Type of Property column in the Schedule of Real Estate Owned section is not mapped.
- Section titled “List any additional names under which credit has previously been received” is not mapped.
- Several items (d, e, f, g, h, i, k, m, n, o and p) in VII. Details of Transaction section are not mapped but computed in UniFi.
- If nothing is entered on Form RD 410-4 in section VIII. Declarations, items default to No.
- Item m (Have you had ownership interest in a property in the last 3 years?) in section VIII. Declarations will be Yes if Own was checked on Present Address on page 1 of Form RD 410-4.

### Page 5 of Form RD 410-4

- Dates are not mapped.
- Borrower and Co-Borrower answer to question “I do not wish to furnish this information” is not mapped. Source of Ethnic/Race Data field in UniFi will be determined by the check in item on page 8 “Racial Data Provided By”.

- Interviewer's Name is not mapped.
- Interviewer's Signature is not mapped.
- Interviewer's Phone Number is not mapped.

Page 6 of Form RD 410-4

- Loan Type is not mapped.
- Source of Wage Income (household members 1 and 2) is not mapped.
- Household Members 3 through 6 are not mapped.

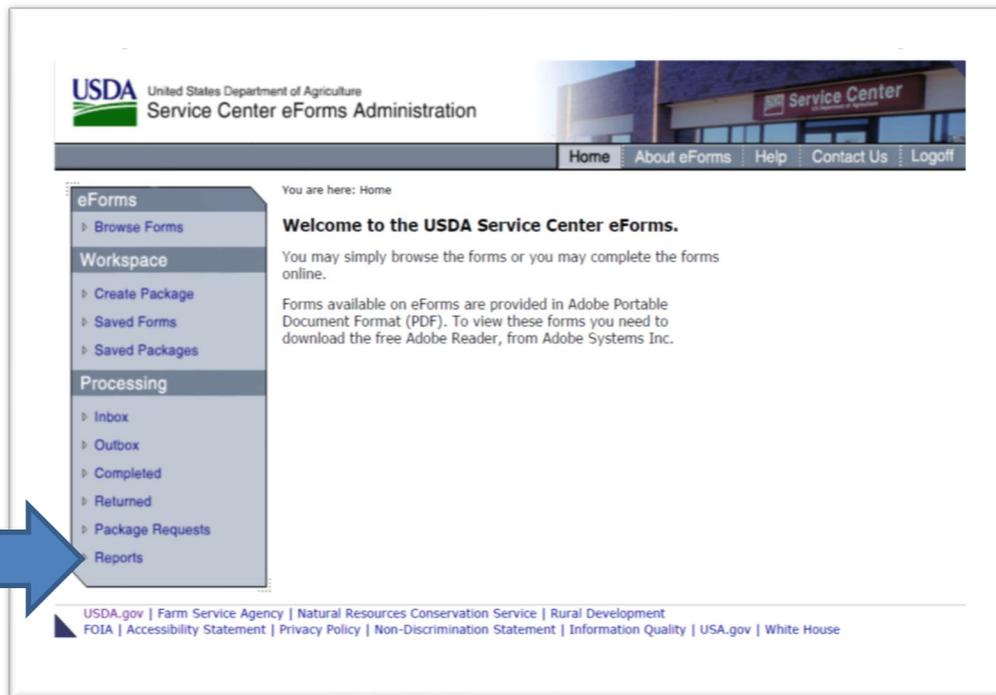
Page 8 of Form RD 410-4

- Determination of Eligibility field is not mapped.

## Reports

Reports are available in the eForms site to track new, pending, accepted, new redirected, and returned applications. Report should be generated periodically to ensure applications are processed timely. The report is a great tool to confirm applications have been submitted to locations with staff to process the applications.

**Step 1:** Click Reports.



**Step 2:** Under “Select Report Options” click State and in the dropdown menu, select the state. Select Summary or Details (provides data per Field Office within the state) and Range then enter a begin and end date. Under “Select One Report Type With Desired Option” click Volume Statistics and All. Click Search.

You are here: [Home](#) / [Reports](#)

## Reports

**Select Report Options**

All Packages    410-4 Packages Only  
 National    State  

---

Summary    Detail

---

All Dates    Range      

**Select One Report Type With Desired Option**

Open Items  
 All Open    New    Pending  
 New Redirected

Volume Statistics  
 All    All Open Items    Accepted  
 New    Pending    New Redirected  
 Returned