

## Eviction Prevention: Loans Command Center

The “Return to NYC Program Page” takes you back to the NYC page on the TBF-Workplace site.

The “Return Westchester Program Page” takes you back to the Westchester page on the TBF-Workplace site.

The Loans links are specific to each program; the reports will be limited to clients of either NYC or Westchester. The “TBFProgram” field on the search form will indicate which program: TBFNYC or TBFW.

[Return to NYC Program Page](#) [Return to Westchester Program Page](#)

### NYC Loans/Grants:

[Loans Command Center NYC](#) | [NYC Loans by Month](#)

### Westchester Loans/Grants:

[Loans Command Center Westchester](#) | [Westchester Loans by Month](#)

**Search Form:** Search for a loan and/or grant by any of these fields. If all are left blank, then all loans and grants for all

clients in the database for your program (NYC or W) will be shown.

Search by ClientID, name, address, LoanID, type of Loan, purpose of the loan, date or range of dates the loan was provided, sum of payments, status of payment, most recent payment date, and/or Bridge Fund case worker. Use or Purpose of the loan (choices shown here) can be added to, just ask!

*NOTE: For ClientID, enter first letter only to limit search to Borough or Program. For example, enter just “W” for Westchester or “B” for the Bronx or “I” for Income Growth.*

For the first example, let’s enter just the ClientID number, B10031. The First and Last Names are not completely shown here.

TBFProgram  
TBFNYC

ClientID  Last Name, Person 1  First Name, Person 1

Loan ID  Type (Include "L" or "G")  ?

Use  ▼

Loan Date AFTER   Loan Date BEFORE

Most Recent Payment AFTER   Most Recent Payment BEFORE

Status  Active  Paid  Defaulted Worker

Client Address

Street & Apt # or PO Box  City  ZIP

[SEARCH](#)

[Search Again](#) [Download Data](#)

ClientID ▲	Loan ID	First Name	Last Name	Use	Type	Loan Date	Loan Amount	Status	Repay Start Date	Monthly Repayment	Worker	Loan Balance	Sum of Payments	Most Recent Payment	Most Recent Payment Amount	Rent	Household Income	Rent Burden%	Rent Owed
B10031	B10031CG	L	W	EP	CG	2/15/2019	\$1,559.00	P		\$0.00	ESM	\$0.00	\$0.00		\$0.00	\$1,018.00	2763	36.84	\$0.00
B10031	B10031L1	L	W	EP	L1	2/14/2019	\$2,500.00	A	2/15/2019	\$10.00	ESM	\$2,390.00	\$110.00	3/31/2020	\$100.00	\$1,018.00	2763	36.84	\$0.00
AVERAGES							\$2,029.50									\$1,018.00	2763	36.84	\$0.00

Client B10031 has received both a loan and a grant in February 2019. The grant has the status of Paid, as all grants do. The loan is to be repaid at \$10 per month, and as of the end of March 2020, the repayments total \$110. The client actually made a payment of \$100 on March 31, 2020. If 18 months go by with no further payments, the Loan Status will be marked as D (Defaulted). Scroll to the right side of the report to see more options at the end of each row:

Payment Details	ADD Loan	ADD Payment		
See Payments	Add Loan	Add Payment	Search ALL Payments	View Details  Delete
See Payments	Add Loan	Add Payment	Search ALL Payments	View Details  Delete
See Payments	Add Loan	Add Payment	Search ALL Payments	View Details  Delete

**See Payments** (for this loan): No payments if this is a grant

**Add Loan** (for this client): to add a NEW loan or grant.

**Add Payment** (for this loan): add a NEW payment. If payments are for a different Loan, use Add Payments at the end of the row for **that** particular loan.

**Search ALL Payments** for any client, any loan, any status, date range

**View Details:** to see all the details for this Loan or Grant.

**Delete:** to remove this loan or grant from the database. (Careful!).

ClientID  Type (L1, G1..) \*  Loan ID \*

Loan Date \*  Loan Amount \*

Status  Active (for Loans)  Paid (for Grants) Worker  Uses/Purpose of Loan

Repay Start Date  Monthly Repayment

Rent  Rent Owed

Con Ed Account#

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Legal Status

OBP  Check if YES Court Case  Check if YES

Petition?  Check if YES petition index

one shot deal  Check if YES one shot status

Marshall's Date

**Add a Loan:** The ClientID is carried over from the prior screen. Put in the Type of Loan, such as EFG1 or RL2. All Grants must include "G" and all Loans must include "L". The LoanID should be entered as a combination of ClientID and Type. For example, if client B10031 is being given a second loan, L2, then the Loan ID should be entered as B10031L2. Loan IDs are unique, one per Loan or Grant. When Payments are made, they are attached to the specific LoanID. This is a change from ACCESS.

Put in Loan Date and Amount (required). Enter other relevant fields, none required, but useful if you have the information.

*Petition Index* and *One Shot Status* boxes will only appear if you check *Petition?* Or *One Shot Deal* checkboxes.

Form continues on next page....

Referring Agency

If client referred by another agency, choose **Either** Agency Name **OR** Agency Acronym (**not both**):

NYC Agency Name NYC Agency acronym

Select Agency Name Select Acronym

Agency Contact

Vendor Information

Vendor Check Date Check Number Month Paid

months owed

Check All that apply as Reasons for Arrears:

Unemployed <input type="checkbox"/>	Underemployed <input type="checkbox"/>	Medical Expense <input type="checkbox"/>
Funeral Expense <input type="checkbox"/>	Desertion, Loss of Partner <input type="checkbox"/>	Loss of Roommate <input type="checkbox"/>
Covid 19 related <input type="checkbox"/>	Legal Expenses <input type="checkbox"/>	Problem with Benefits <input type="checkbox"/>

If the client was referred by another agency, enter that Agency here, using either Agency Name or Agency Acronym (not both). Enter contact person at Agency if relevant.

If you pay the landlord or utility company or other creditor directly, enter payment information.

Reasons for Arrears: this is a new category of information, subject to change upon request. Check all that apply to explain why the Client was in arrears.

SUBMIT to Save this NEW loan information. Use browser BACK arrow to return to the Search Form. If you have not pressed SUBMIT, the new information will not be stored.

**See Payments:** Clicking on See Payments will show all the payments Client B10031 has made toward LoanID B10031L1:

Payment Date	Paid Amount	Check#	Copy of Check	Loan Date	Loan Amount	Purpose	Status	Repay Start Date	Monthly Repayment	ADD Payment	ADD Loan	
2/28/2019	\$10.00			2/14/2019	\$2,500.00	EP	A	2/15/2019	\$10.00	Add Payment (this Loan)	Add Loan (this client)	Edit  Delete
3/31/2020	\$100.00			2/14/2019	\$2,500.00	EP	A	2/15/2019	\$10.00	Add Payment (this Loan)	Add Loan (this client)	Edit  Delete

Records 1-2 of 2

Two payments have been made: \$10 on 2/28/2019 and \$100 on 3/31/2020. You can add a NEW payment from the **Add Payment (this loan)** link, **Edit** the details of either of these payments, **Delete** the payment, or even **Add a NEW loan** for this client.

ClientID    LoanID  
 B10031    B10031L1

Date \*                      Check#  
                     

Amount \*                      Re-Enter Amount \*  
                     

Copy of Check

**SUBMIT**

**Add Payment:** The NEW payment will be made toward the ClientID and LoanID shown. The Date and Amount are required, and you are required to enter the amount a second time to prevent errors. Optionally, you can scan a copy of the check to your computer, and then upload the copy here. If you click on the down arrow , you will see files on your computer. Navigate to the scanned file of the check and upload that. A folder on the Caspio server is named UploadedChecks; this scanned check will be stored there.

Enter a LoanID, or Any beginning part of a ClientID or LoanID, range of payment dates and/or amount paid, and or check number

ClientID                      LoanID  
                     

Loan Date AFTER                      Loan Date BEFORE  
                     

Status                      Loan Type  
 All    Active    Default    Paid                     

Date Paid AFTER                      Date Paid BEFORE  
                     

Amount                      Check#  
                     

**SEARCH**

**Search ALL Loans and Payments:** This Search Form is not limited to the Loan on this row. Here, you can enter a ClientID or LoanID in full (such as B10002, B1002L1), or just the beginning letter of the ClientID (such as K for ALL Brooklyn Loans) and/or a partial LoanID (such as L1 or L2). Limit the search by a range of dates the Loan was provided, and/or a range of dates payments were made. Other options are Status of loan, Loan Type, exact amount, exact check number of payment.

**Example:** Enter M (Manhattan) as ClientID and Date Paid AFTER 4/1/2021 and Paid Before 5/1/2021 to see payments from all Manhattan clients during April 2021, partial results shown here:

Loan ID	ClientID	Type	Loan Date	Loan Amount	Status	Date	Amount	Check#	Copy of Check
M4284L2	M4284	L2	2/14/2020	\$696.00	A	4/28/2021	\$15.00		 View Details
M5123L1	M5123	L1	1/8/2009	\$1,356.85	A	4/28/2021	\$5.00		 View Details
M6772TL1	M6772	TL1	9/30/2011	\$2,194.00	A	4/28/2021	\$20.00		 View Details
	M6772	TL1	9/30/2011	\$2,194.00	A	4/28/2021	\$20.00		 View Details

From this page, you can Download Data and print. Or you can View Details to see all details of the loan and payment for each LoanID, but you cannot edit them here. Return to the Loan Command Center results page to make edits as shown next.

<b>Worker</b>		
<input type="text" value="ESM"/>		
<b>Loan ID *</b>	<b>Type</b>	
<input type="text" value="B10031L1"/>	<input type="text" value="L1"/>	
<b>Loan Date</b>	<b>Loan Amount</b>	<b>Status</b>
<input type="text" value="02/14/2019"/>	<input type="text" value="2500"/>	<input type="text" value="A"/>
<b>Use</b>		
<input type="radio"/> Books/School Fees <input checked="" type="radio"/> Eviction Prevention <input type="radio"/> Food <input type="radio"/> Foreclosure Prevention <input type="radio"/> Moving Expense <input type="radio"/> Utilities		
<b>Email, Person 1</b>		
<b>Repay Start Date</b>	<b>Monthly Repayment</b>	
<input type="text" value="02/15/2019"/>	<input type="text" value="10"/>	
<b>Rent</b>	<b>Rent Owed</b>	<b>months owed</b>
<input type="text" value="1018"/>	<input type="text" value="0"/>	<input type="text"/>
<b>Court Case</b>	<b>Petition?</b>	<b>petition index</b>
<input type="text"/>	<input checked="" type="checkbox"/> Check if YES	<input type="text"/>
<b>OBP</b>	<b>one shot deal</b>	<b>one shot status</b>
<input type="checkbox"/> Check if YES	<input type="checkbox"/> Check if YES	<input type="text"/>

**View Details:** (again, name is not shown here) is a way to see AND EDIT the details of the loan or grant. The details would be those entered in the loan ADD LOAN form, so will not be repeated here. Only some of the Details are shown here.

At the bottom of the form are buttons to UPDATE, BACK, and DELETE. If you make any changes to the information and wish to save then, use UPDATE. To cancel changes or just to go back to the report, use BACK. To remove this Loan or Grant, use DELETE and the entire Loan or Grant will be removed completely from the database.

Use the Record # and arrows to move back and forth between the Loans and Grants for THIS client.

(rest of form not shown here)

Record  of 2

Click on [Search Again](#) to start a new search. This time, let's see how many Gift Cards for groceries given to clients during the height of the Covid pandemic say, from March 2020 through March 2021.

**TBFProgram**  
TBFW

ClientID:  Last Name, Person 1:  First Name, Person 1:

Loan ID:  Type (Include "L" or "G") ?

Use:

Loan Date AFTER:  Loan Date BEFORE:

Status:  Active  Paid  Defaulted

Worker:

**SEARCH**

For **Type**, use **GC** (for Gift Card), and **Use** is set to *Food*.

A *range of dates* specifies that all the Gift Cards we wish to see must have been given between those two dates.

The report (name hidden) groups all loans and grants given to each ClientID. To Expand the group to see all the loans and grants, click on the small  next to the ClientID. Client W6092 received a \$150 gift

card on 6/29/2020. The total number of gift cards given was 378. To create an EXCEL file with all this data, click on

 [Download Data](#)

 [Search Again](#)  [Download Data](#)

ClientID	Loan ID	First Name	Last Name	Type	Use	Loan Date	Loan Amount	Status	Repay Start Date	Monthly Repayment	Worker	Loan Balance	Sum of Payments	Most Recent Payment
TOTAL LOANS/GRANTS		378												
 <b>W6092</b>														
	W6092GC	B	E	GC	N	6/29/2020	\$150.00	P			GP	\$150.00	\$0.00	
 <b>W6139</b>														

A file name will appear at the bottom of your browser. Click on that to open EXCEL with this file. A part of the EXCEL file is shown here (names hidden):

 Client\_Loans Search....xml

	A	B	C	D	E	F	G	H	I	J	K	L
1	ClientID	Loan ID	First Nam	Last Nam	Type	Use	Loan Date	Loan Amo	Status	Repay Sta	Monthly F	Worker
2	Total Loan	378										
3	W6092											
4		W6092GC			GC	N	6/29/2020	\$150.00	P			GP
5	W6139											
6		W6139GC			GC	N	6/11/2020	\$100.00	P			SW
7	W6144											
8		W6144GC			GC	N	4/20/2020	\$125.00	P			

### LOAN SUMMARY DATA

The **Loan Command Center** has other useful information about individual clients, and about a group of clients.

**Individual Loan Balance:** For individual client loans, there is information about the Most Recent Payment Date and Amount, the Sum of Payments made toward that Loan, and the remaining Loan Balance. For example, Client B10089 has one Loan, B10089L1. The most recent payment was \$20 on 4/28/2021. Altogether, this client has repaid \$230 of a Loan of \$1,341 made on 4/3/2019. The remaining balance is \$1,111. If this client had another loan, that loan would be listed on a separate row of this table. In this Search, we specified Active loans. You could also specify Default or Paid Loans. Or just Grants, in which case there would be no payments, and the “Loan Balance” would be the same as the “Loan Amount”.

**Individual Rent Burden:** For this same client, B10089, the monthly rent is \$535/month and the Income is \$1181. This means that the client’s rent burden is 45.3%. Note, however, that our data on income has been evolving from having data for Income Person 1 and, maybe, Income Person 2, to a form that includes all types of income for only the most recent clients. So, we don’t have the same quality of income data for every client. What this table shows, for now, is that the column “Household Income” is the sum of “Income Person 1” plus “Income Person 2”.

ClientID ▲	Loan ID	Loan Date	Loan Amount	Status	Repay Start Date	Monthly Repayment	Worker	Loan Balance	Sum of Payments	Most Recent Payment	Most Recent Payment Amount	Rent	Household Income	Rent Burden%	Rent Owed
B10089	B10089L1	4/3/2019	\$1,341.00	A	4/15/2019	\$10.00	TG	\$1,111.00	\$230.00	4/28/2021	\$20.00	\$535.00	1181	45.3	\$1,998.00
B10128	B10128L1	4/22/2019	\$1,231.00	A	5/15/2019	\$20.00	RA	\$996.00	\$235.00	1/31/2021	\$100.00	\$1,414.00	3270	43.24	\$3,845.00
B10149	B10149L1	4/29/2019	\$1,125.00	A	6/15/2019	\$25.00	RG	\$845.00	\$280.00	4/28/2021	\$25.00	\$1,350.00	2888.59	46.73	\$3,400.00
B8534	B8534L1	4/9/2019	\$1,099.31	A	4/22/2019	\$10.00	RG	\$949.31	\$150.00	4/28/2021	\$20.00	\$1,259.46	3574	24.22	\$4,499.31
M9449	M9449L1	4/26/2019	\$670.27	A	5/15/2019	\$10.00	ESM	\$510.27	\$160.00	4/28/2021	\$50.00	\$1,499.00	3057	49.03	\$1,470.27
AVERAGES			\$1,093.32									\$1,211.49	2794.118	41.704	\$3,042.52

Caspio offers formulas to calculate Totals and Averages, but not Medians. Medians are better than Averages if you have outliers in the data. If you have some Rents lower or higher than other rents in the group. Take the rents in the group

	A	B	C	D	E
1		Rent			Rent
2		535			535
3		1414			1414
4		1350			1350
5		1259			1259
6		1499			1499
7	Average	1211.4		Median	1350

above. Using EXCEL, we calculate Average (on the left) and Median (on the right) for the same rents. The Average, 1211.4, is lower than the Median of \$1350. Why? **Median** is determined by ranking the data from largest to smallest, and then identifying the middle so that there are an equal number of data values larger and smaller than it is. Under these circumstances, **median** gives a **better** representation of central tendency than **average**.

A request has been made to Caspio to include Median as an option. In the meantime, we will use the available Average. You can export to EXCEL and calculate Median easily. The formula for Median in our example is Median= (E2:E6).

**Group Average Loan Amount:** At the bottom of the columns are Averages for relevant statistics, such as **Loan Amount**. This can be found for any and/or all of these: a range of dates, or Grants only, or by Purpose (Eviction Prevention, Utilities, etc.), or by Status (Active or Default).

**Group Average Monthly Rent:** In the above example, the Average rent was \$1,211.49. The Average Household Income was \$2,794.12 and thus the Average Rent Burden was 41.7%. The Average amount of Rent Owed was \$3,052.52.

**Group by Borough or Program:** In the **Loans Command Center**, unlike other Reports, you can enter either the exact ClientID or just the first letter: B, K, M, Q, I, D, R, U for New York City. For Westchester, all clients in that program begin

with W at this time. Then, you can also add other options for Loan or Grant, range of dates, Purpose (Moving, Eviction Prevention, Utilities), Status (Active, Paid, Default). Using the initial letter of the ClientID will limit the search to that Borough or Program.

The alternative is to enter no ClientID or LoanID and choose any other or no options. The results will be in alphabetical order of Client ID. Then Download data to Excel and do your own subtotals at the end of each Borough/Program group. This EXCEL sheet is a shortened example:

	A	B	C	D	E	F	G	H	I	J
1	ClientID	Loan ID	Use	Type	Loan Date	Loan Amoun	Rent	Household	Rent Burd	Rent Owed
2	B10089	B10089L1	EP	L1	4/3/2019	1,341.00	\$535.00	1181.00	31.17	\$1998.00
3	B10128	B10128L1	EP	L1	4/22/2019	1,231.00	\$1414.00	3270.00	30.18	\$3845.00
4	B10149	B10149L1	EP	L1	4/29/2019	1,125.00	\$1350.00	2888.59	31.85	\$3400.00
5	B10156	B10156L1	EP	L1	5/16/2019	912.50	\$692.00	2195.41	23.96	\$2131.50
6	B10162	B10162L1	EP	L1	5/29/2019	775.85	\$1251.33	2000.00	38.48	\$4150.84
7	B10165	B10165L1	EP	L1	5/30/2019	1,434.40	\$1123.40	3523.50	24.17	\$3535.40
8	B10179	B10179L1	EP	L1	5/6/2019	1,424.02	\$461.00	1300.00	26.17	\$2624.02
9	B8534	B8534L1	EP	L1	4/9/2019	1,099.31	\$1259.46	3574.00	26.05	\$4499.31
10	<b>TOTAL</b>					<b>9,343.08</b>				
11	<b>MEDIAN</b>					<b>1,231.00</b>	<b>1,187.37</b>	<b>2,542.00</b>	<b>28.18</b>	<b>3,467.70</b>
12	<b>AVERAGE</b>					<b>1,167.89</b>	<b>1,010.77</b>	<b>2,491.56</b>	<b>29.00</b>	<b>3,273.01</b>
13										
14	K5486	K5486L1	EP	L1	5/31/2019	1,546.00	\$954.14	1690.62	36.07	\$10402.46
15	K5506	K5506L1	EP	L1	5/8/2019	1,812.12	\$847.00	2242.12	27.41	\$7859.12
16	<b>TOTAL</b>					<b>3,358.12</b>				
17	<b>MEDIAN</b>					<b>1,679.06</b>	<b>900.57</b>	<b>1,966.37</b>	<b>31.74</b>	<b>9,130.79</b>
18	<b>AVERAGE</b>					<b>1,679.06</b>	<b>900.57</b>	<b>1,966.37</b>	<b>31.74</b>	<b>9,130.79</b>
19										
20	M7967	M7967L	EP	L	5/30/2019	2,340.00	\$1182.60	2290.24	34.05	\$3222.60
21	M9445	M9445L1	EP	L1	5/22/2019	1,208.59	\$1087.00	3556.00	23.41	\$2295.59
22	M9449	M9449L1	EP	L1	4/26/2019	670.27	\$1499.00	3057.00	32.90	\$1470.27
23	M9452	M9452L1	EP	L1	5/20/2019	2,003.07	\$1137.85	1804.00	38.67	\$3653.07
24	<b>TOTAL</b>					<b>6,221.93</b>				
25	<b>MEDIAN</b>					<b>1,605.83</b>	<b>1,160.23</b>	<b>2,673.62</b>	<b>33.48</b>	<b>2,759.10</b>
26	<b>AVERAGE</b>					<b>1,555.48</b>	<b>1,226.61</b>	<b>2,676.81</b>	<b>32.26</b>	<b>2,660.38</b>

You can do the same calculations, except for Median, with Caspio, by doing each Borough or Program separately.

**LOAN PAYMENTS BY MONTH:** To see what payments have been made over a certain time period, SEARCH for **Type L** (for Loan), **Sum of Payments Greater** than 0 (to see actual payments), and a range of dates. For example, to see all the payments in the first quarter of 2021, enter **Most Recent Payment Date AFTER 12/31/2020** and **Most Recent Payment Date BEFORE 4/1/2021**.

TBFProgram  
TBFNYC

ClientID:  Last Name, Person 1:  First Name, Person 1:

Loan ID:  Type (Include "L" or "G"):

Use:  Sum of Payments is Greater than:

Loan Date AFTER:  Loan Date BEFORE:

Most Recent Payment Date AFTER:  Most Recent Payment BEFORE:

Status:  Active  Paid  Defaulted Worker:

The results (partially shown here) are in order of ClientID. Click on Column Head "Most Recent Payment" to re-sort.

Loan Balance	Sum of Payments	Most Recent Payment	Most Recent Payment Amount
\$1,781.78	\$352.00	3/24/2021	\$200.00
\$996.00	\$255.00	1/31/2021	\$100.00
\$1,971.94	\$225.00	3/24/2021	\$30.00
\$1,927.47	\$50.00	3/24/2021	\$10.00
\$692.41	\$80.00	2/28/2021	\$20.00

Sum of Payments	Most Recent Payment ▲	Most Recent Payment Amount
\$235.00	1/31/2021	\$100.00
\$10.00	1/31/2021	\$10.00
\$40.00	1/31/2021	\$20.00
\$1,578.54	1/31/2021	\$8.54
\$2,081.46	1/31/2021	\$25.00

The Most Recent Payment dates have now been sorted in ASCENDING order beginning with 1/31/2021. Click again to change to DESCENDING order.

Loan Balance	Sum of Payments	Most Recent Payment ▼	Most Recent Payment Amount
\$1,781.78	\$352.00	3/24/2021	\$200.00
\$1,971.94	\$225.00	3/24/2021	\$30.00
\$1,927.47	\$50.00	3/24/2021	\$10.00
\$1,000.00	\$52.00	3/24/2021	\$52.00
\$518.89	\$1,145.00	3/24/2021	\$20.00

**APPENDIX: Use Loan Command Center to See Funding from Outside Sources and Client Details about Those Helped with these Funds.**

The following example for The Bridge Fund of New York City shows how to use the Loan Command Center to tally funding from a specific funder, such as Robin Hood or EFSP during a given benefit period. In addition, show details about the clients who benefited from these funds such as family composition, ethnicity, income and sources of income, rent, rent burden, housing type, and AMI%. NOTE: Use the appropriate link for your program (TBFNYC or TBFW) found on your program page at <https://www.thebridgefund.org/tbf-workplace>

**QUESTION: Which Bronx Clients were provided Eviction Prevention assistance with a Robin Hood Grant during a specific month?**

TBFPProgram  
tbfnyc

ClientID:  Last Name, Person 1:  First Name, Person 1:

Loan ID:  Type (Include "L" or "G"):

Use:

Loan Date AFTER:  Loan Date BEFORE:

Most Recent Payment AFTER:  Most Recent Payment BEFORE:

Status:  Active  Paid  Defaulted

Worker:  Sum of Payments GREATER than:

**SEARCH**

Enter "B" for either ClientID or LoanID, "RG" for Robin Hood Grant, "Eviction Prevention" for Use and Date range (here, it is for April 2021). Use "W" for ClientID for Westchester, "EFG" for Type for EFSP Grant that was not a specific contribution to an individual.

**Results are shown in wide, scrollable table. Here is Left Portion:** shows Use (eviction prevention, utilities, food, foreclosure prevention, etc.), Type, Loan or grant Date and Amount/Average Amount for group, payment information if a loan, household income and average household income.

Search Again Download Data

ClientID	Loan ID	First Name	Last Name	Use	Type	Loan Date	Loan Amount	Status	Repay Start Date	Monthly Repayment	Worker	Loan Balance	Sum of Payments	Most Recent Payment	Most Recent Payment Amount	Household Income
B10806	B10806RG	Olga	Gonzalez	EP	RG	6/30/2021	\$774.00	P			RG	\$0.00	\$0.00			2094.34
AVERAGES							\$774.00									2094.34

**Right side of table:** shows Rent/Average Rent, Rent Burden, #Adults, #Adult Children, #Children, #Seniors, total household members, and Rent Owed and Average Rent Owed.

Rent	Rent Burden%	Housing Type	# Adults in Household	# Adult Children	# Children	# Seniors	# Household Members	Rent Owed
\$1,494.76	71.37	Stabilized	0	0	0	1	1	\$3,200.00
\$1,494.76	71.37							\$3,200.00

Click on **Download Data** to export to CSV file you can open in EXCEL

**Question: What Client details can be provided to a Funder regarding the clients their funds were used to assist?**

There are two types of funding: (1) Agency Contribution, handled by the **Agency Contribution Report**, and (2) Funder, such as Robin Hood, identified by the TYPE of the loan/grant (RL1 or RG1, for example). The Loan Command Center can be used to answer the second source of funding.

An example: Show the Manhattan Clients receiving a Robin Hood Grant during April 2021, and give client details about family composition, income, race, rent, sources of income, etc.

To limit the search to Manhattan Clients, use "M" for ClientID. Entering nothing for ClientID will result in ALL clients receiving a grant during the date range you specify. Here we limit the time to the month of February. (Dates 2/1/2021 and 2/28/2021 will have same results).

The TYPE is how you limit the search by Funder. This is separate from Agency Contribution. Funder is for Robin Hood or other funders who do not specify a client to assist.

Use/Purpose is another way to limit the search to Eviction Prevention or Foreclosure Prevention or Utilities, etc.

Search Again Download Data

ClientID	Loan ID	First Name	Last Name	Use	Type	Loan Date	Loan Amount	Status	Repay Start Date	Monthly Repayment
<b>#CLIENTS</b>		2								
<b>TOTAL</b>		\$1,352.81								
<b>AVERAGES</b>		\$676.41 \$0.00								
M9843	M9843RG			EP	RG	2/5/2021	\$774.00	P		\$0.00
M9867	M9867RG			EP	RG	2/19/2021	\$578.81	P		\$0.00
<b>#CLIENTS</b>		2								
<b>TOTAL</b>		\$1,352.81								
<b>AVERAGES</b>		\$676.41 \$0.00								

The results are shown in a table. The data can be downloaded in CSV format for EXCEL .

Here are the first 11 columns. There were two clients receiving Robin Hood grants totaling \$1,352.81 during February 2021, both used for Eviction Prevention.

M9843 received a grant of \$774, and M9867's grant was \$578.81. Average Grant was \$676.41. No repayments for grants.

Scroll to the right for more information about these clients.



AMI Taxable Annual Income	AMI% for Household Size	Payment Details	ADD Loan	ADD Payment	ClientID	
\$0.00	0	<a href="#">See Payments</a>	<a href="#">Add Loan</a>	<a href="#">Add Payment</a>	M9843	<a href="#">Search ALL Payments</a>  <a href="#">View Details</a>
\$0.00	0	<a href="#">See Payments</a>	<a href="#">Add Loan</a>	<a href="#">Add Payment</a>	M9867	<a href="#">Search ALL Payments</a>  <a href="#">View Details</a>

If we had **Sources of Income** for these clients, we could have calculated **AMI taxable Annual Income** and **AMI%** based on taxable income (from wages, pension, unemployment benefits) and household size. The calculation is derived from Area Median Income values from HUD each year.

This report also has links for adding loans, payments, viewing payments. None of that is relevant to this report on Robin Hood grants. **View Details** is