

HLC Housing OneStop

Consultant User Guide

Consultant Admin & Consultant Standard User

*Executive Office of Housing & Livable Communities
Commonwealth of Massachusetts*

June 2026

MODULE 1 – REGISTRATION AND FIRST LOGIN

1. Introduction
 - 1.1 Key Facts
 - 1.2 Understanding Consultant User Roles
 - 1.3 Understanding the Two Access Contexts
2. First-Time Registration and Login
 - 2.1 Step 1 – Create a MyMassGov Account
 - 2.2 Step 2 – Register in the GMS Portal
 - 2.3 Step 3 – Await Approval
 - 2.4 Step 4 – Log In to the Housing OneStop Portal
3. Quick Reference – Registration and Login Summary
 - 3.1 First-Time Setup Process Summary
 - 3.2 Help and Support

MODULE 2 – CONSULTANT ADMIN

1. User Management
 - 1.1 Navigating to User Management
 - 1.2 Approving or Rejecting Registration Requests
 - 1.3 Activating and Deactivating Users
 - 1.4 Managing Your Organization Details
2. Reviewing Projects and Applications
 - 2.1 Navigating to Projects
 - 2.2 Viewing a Project Record
 - 2.3 Reviewing Pre-Applications (EOHLC Consultant)
 - 2.4 Editing Pre-Applications on Behalf of a Sponsor (Sponsor Consultant)
 - 2.5 Reviewing Full Applications (EOHLC Consultant)
 - 2.6 Editing Full Applications on Behalf of a Sponsor (Sponsor Consultant)
 - 2.7 Reviewing Requisitions
 - 2.8 Generating and Downloading the Application Summary PDF
 - 2.9 Financing Summaries

MODULE 3 – CONSULTANT STANDARD USER

1. Overview
2. Accessing Your Assigned Projects
 - 2.1 Navigating to Projects
 - 2.2 Viewing a Project Record
3. Reviewing and Editing Applications

Right-click the table above and select “Update Field” to refresh page numbers after opening in Microsoft Word.

MODULE 1 – REGISTRATION AND FIRST LOGIN

1. Introduction

This user guide is intended for external Consultant users who access the Housing OneStop portal to support and review housing development funding applications on behalf of sponsors or EOHLC. It covers the complete first-time registration and login process, as well as how to navigate the portal and perform core tasks.

Consultant users operate in two distinct contexts within the GMS:

- **Sponsor Side** — A Sponsor Admin assigns Consultant users to a project, allowing them to edit pre-applications and full applications on behalf of the sponsor. Consultants in this context can edit but cannot submit applications.
- **EOHLC Side** — EOHLC Super Admins or Admins assign Consultant Admins to a project, giving them read-only access to review submitted pre-applications and full applications and report findings back to EOHLC.

This guide applies to both Consultant user roles: Consultant Admin and Consultant Standard User. The registration and first-login process is the same for both roles.

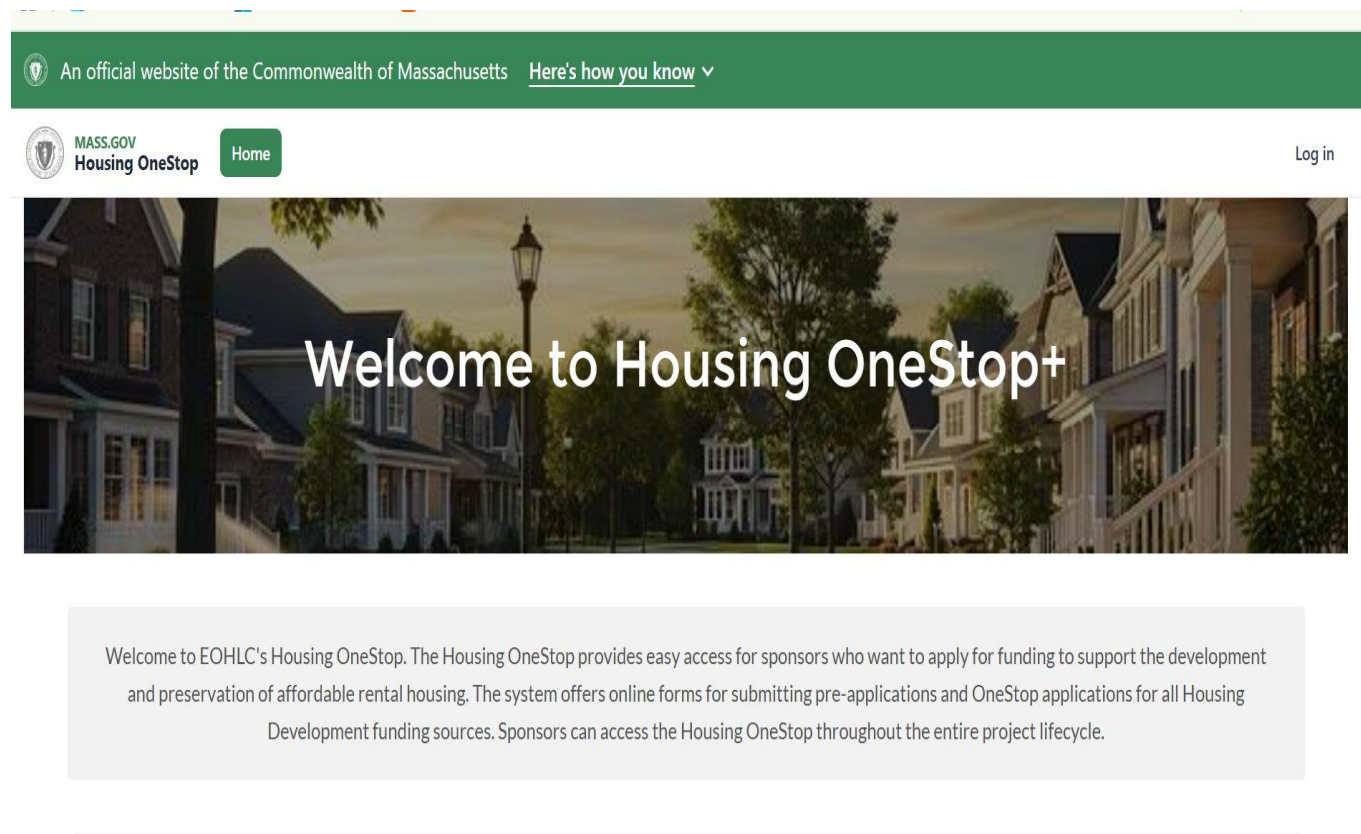


Figure 1 – Housing OneStop portal landing page

1.1 Key Facts

- Access to the Housing OneStop portal requires registration through MyMassGov (the Commonwealth's Single Sign-On system) and then through the GMS portal.
- Your organization must already be registered in GMS. If it is not, you will create a new organization during registration.
- After registering as a Consultant Standard User, your Consultant Admin must approve your request before you can access the portal.
- Consultant Admins are approved by EOHLC Super Admins or Admins.
- Once approved, you will access the Housing OneStop portal using your MyMassGov credentials.

1.2 Understanding Consultant User Roles

The GMS supports two Consultant user roles. Your role determines what you can do within the Housing OneStop portal.

Role	Access Level	Description
Consultant Admin	Administrative access	Can approve or reject Consultant Standard User registrations. Can activate or deactivate users. Can review submitted applications (EOHLC Side) and edit applications on behalf of a sponsor (Sponsor Side).
Consultant Standard User	Standard access	Can view and review projects and applications assigned to them. Can edit pre-apps and full apps on behalf of a sponsor (Sponsor Side) but cannot submit. Cannot manage users or assign projects.

Note: Your role is determined during registration. If you believe your role is incorrect, contact your Consultant Admin or EOHLC for assistance.

1.3 Understanding the Two Access Contexts

Consultant users may be given access to projects from two different sources, which affect what actions they can take:

Context	Assigned By	What You Can Do
Sponsor Side	Sponsor Admin (via User Access tab on project record in portal)	View project record and all pre-apps and full apps. Edit pre-apps and full apps on behalf of the sponsor. Cannot submit applications.
EOHLC Side	EOHLC Super Admin or Admin (via User)	View project record and all submitted pre-apps and full apps. Review applications and report to EOHLC.

Context	Assigned By	What You Can Do
	Management tab on project record in GMS)	Review requisitions and financing summaries. Download PDFs.

Tip: You may have access to the same project through both contexts simultaneously. In that case, both your edit permissions (Sponsor Side) and your review access (EOHLC Side) will apply to that project.

2. First-Time Registration and Login

2.1 Step 1 – Create a MyMassGov Account

Access to the Housing OneStop portal requires a MyMassGov account. If you do not already have one, you will need to create one before registering in the GMS portal.

Navigate to the Housing OneStop portal and click Log in. You will be redirected to the MyMassGov login page. If you are a first-time user, click CREATE AN ACCOUNT to begin.

Figure 2 – MyMassGov login page with Create an Account option

You will be asked to consent to sharing your MyMassGov profile information with the Housing OneStop system. Click CONTINUE to proceed.

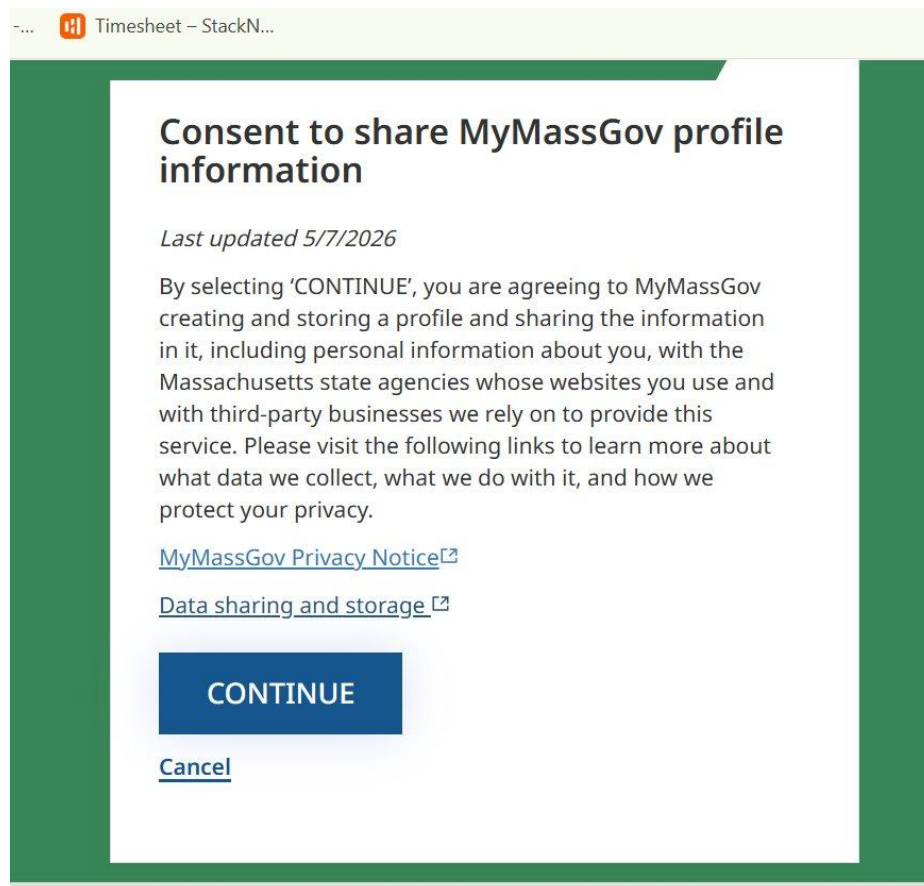
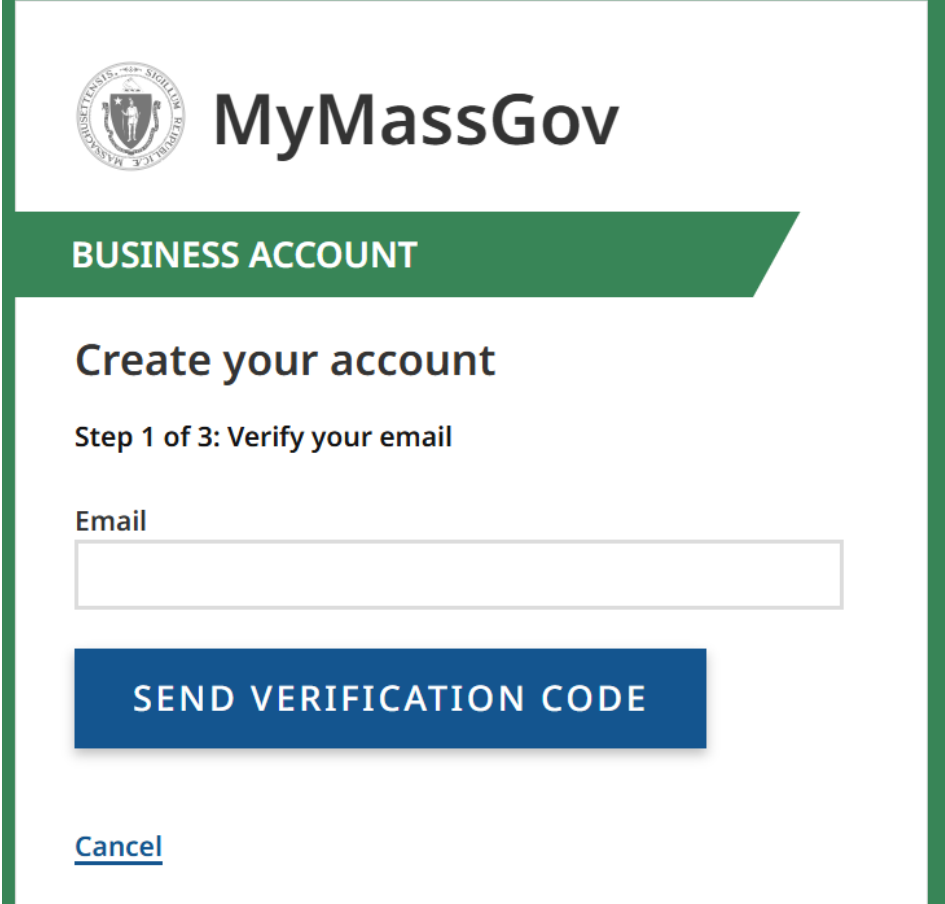


Figure 3 – Consent to share MyMassGov profile information

Account Creation Steps

1. Enter your organizational email address and click SEND VERIFICATION CODE. A six-digit code will be sent to your email.

The image shows a web interface for creating a business account on MyMassGov. At the top left is the Commonwealth of Massachusetts seal. To its right is the text "MyMassGov". Below this is a green banner with the text "BUSINESS ACCOUNT" in white. Under the banner, the heading "Create your account" is displayed. Below the heading is the text "Step 1 of 3: Verify your email". There is a text input field labeled "Email". Below the input field is a blue button with the text "SEND VERIFICATION CODE" in white. At the bottom left of the form area is a blue link labeled "Cancel".

 MyMassGov

BUSINESS ACCOUNT

Create your account

Step 1 of 3: Verify your email

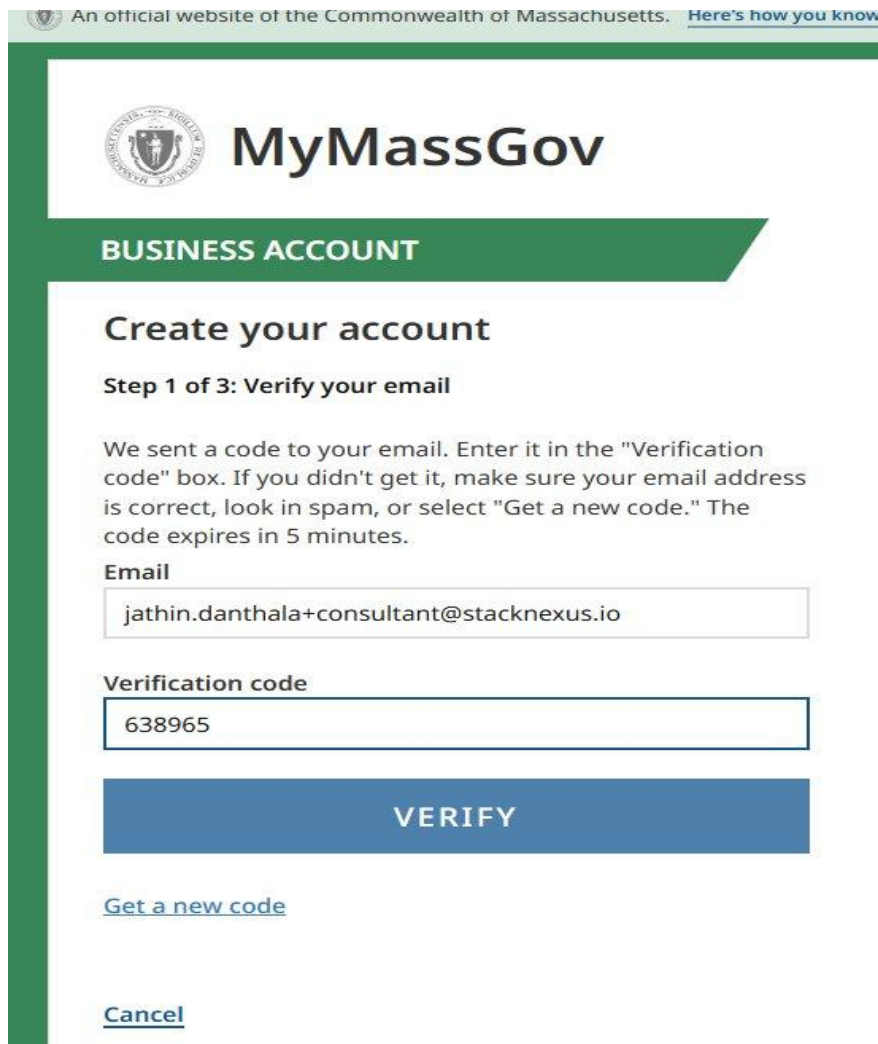
Email

SEND VERIFICATION CODE

[Cancel](#)

Figure 4 – Step 1 of 3: Verify your email address

2. Check your email for the verification code, then enter it in the Verification code field and click VERIFY.



An official website of the Commonwealth of Massachusetts. [Here's how you know](#)

 **MyMassGov**

BUSINESS ACCOUNT

Create your account

Step 1 of 3: Verify your email

We sent a code to your email. Enter it in the "Verification code" box. If you didn't get it, make sure your email address is correct, look in spam, or select "Get a new code." The code expires in 5 minutes.

Email

Verification code

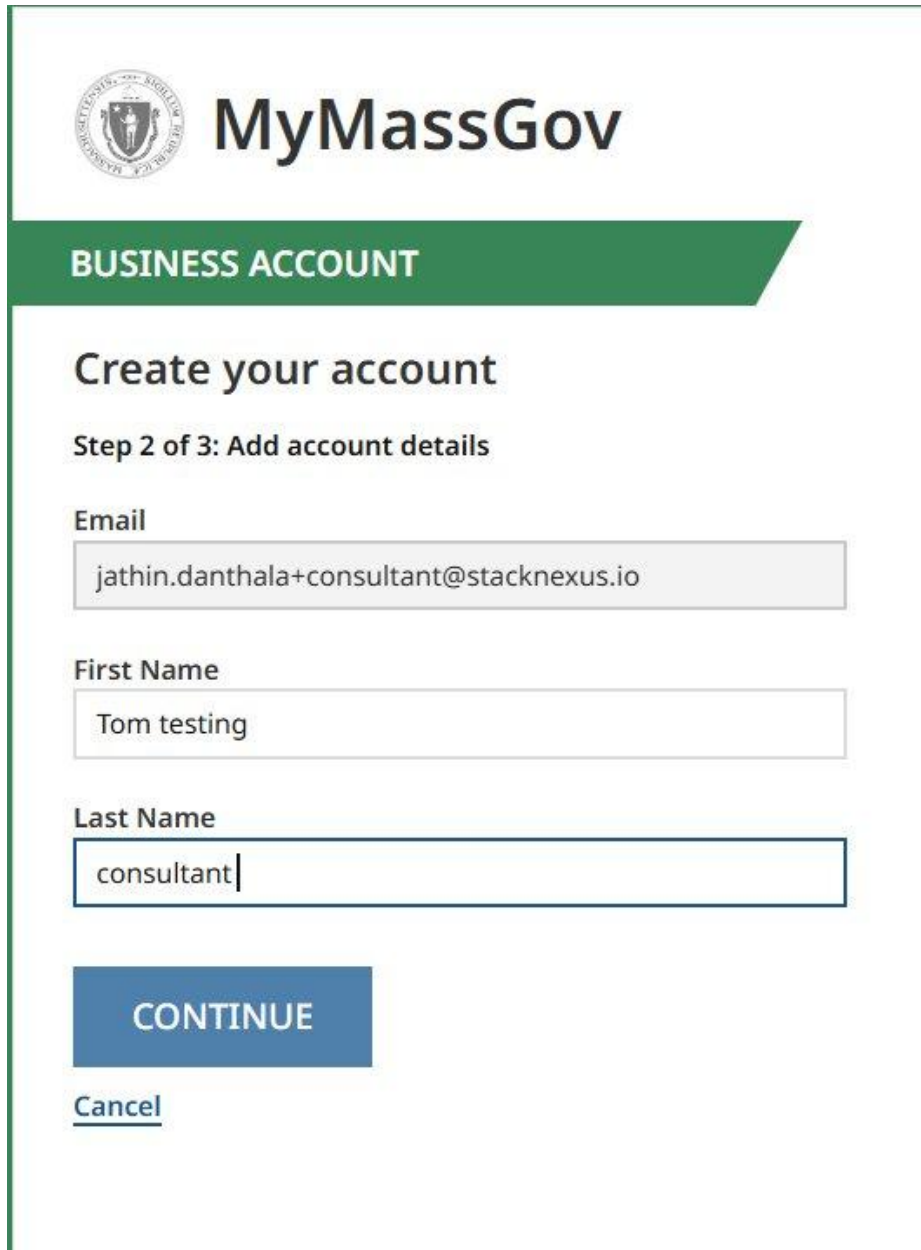
VERIFY

[Get a new code](#)

[Cancel](#)

Figure 5 – Enter the verification code received by email

3. Enter your First Name and Last Name and click CONTINUE.



The screenshot shows the MyMassGov Business Account creation interface. At the top left is the Commonwealth of Massachusetts seal. To its right is the 'MyMassGov' logo. Below this is a green banner with the text 'BUSINESS ACCOUNT'. The main heading is 'Create your account', followed by 'Step 2 of 3: Add account details'. There are three input fields: 'Email' with the value 'jathin.danthala+consultant@stacknexus.io', 'First Name' with the value 'Tom testing', and 'Last Name' with the value 'consultant'. Below the fields is a blue 'CONTINUE' button and a blue underlined 'Cancel' link.

 **MyMassGov**

BUSINESS ACCOUNT

Create your account

Step 2 of 3: Add account details

Email
jathin.danthala+consultant@stacknexus.io

First Name
Tom testing

Last Name
consultant

CONTINUE

[Cancel](#)

Figure 6 – Step 2 of 3: Add account details

4. Create a password following the Password Rules shown on screen (8–64 characters, meeting at least three complexity requirements). Enter and confirm your password, then click CREATE AN ACCOUNT.

BUSINESS ACCOUNT

Create your account

Step 3 of 3: Set up your password

Email

Password Rules

- ✓ Between 8 and 64 characters
- ✓ Must meet at least three of the following requirements:
 - ✓ Contains a special character (e.g., @ # \$ % ^ & *)
 - ✓ Contains a number
 - Contains an uppercase character
 - ✓ Contains a lowercase character

New Password

Confirm New Password

CREATE AN ACCOUNT

[Cancel](#)

Figure 7 – Step 3 of 3: Set up your password

Tip: Once your MyMassGov account is created, you will be automatically redirected to the GMS portal to complete your registration.

2.2 Step 2 – Register in the GMS Portal

After your MyMassGov account is set up, you will be redirected to the GMS portal to complete your registration. This is a four-step process: Account, Org Type, Organization, and Preview.

Step 1 – Enter Your Account Details

On the Create an account screen, enter your personal and contact details: Prefix (optional), First Name, Last Name, Middle Name (optional), Email Address (pre-filled), Title (optional), and Phone number. Click Continue when done.

Create an account

Enter your information to get started with the GMS Portal

Prefix	* First Name
Select an Option ▼	Tom testing
Middle Name	* Last Name
	consultant
* Email Address	
jathin.danthala+consultant@stacknexus.io	
Title	
* Phone	
6506669891	

Continue →

Figure 8 – GMS portal account details form

Step 2 – Select Your Organization Type

On the Select your organization type screen, choose Consultant — Advisory Role. This identifies you as a Consultant who can support and review applications on behalf of sponsors.

Select your organization type

Choose the type that best describes your role in the grant process

Sponsor **Housing Developer** ☐

Apply for funding and manage housing development projects. Sponsors can submit applications, track progress, and manage project documentation.

Consultant **Advisory Role** ☒

Support and review applications on behalf of Sponsors. Consultants can assist with documentation but cannot submit applications directly.

Select your role within this organization:

Consultant Admin ☒
Full access including user management and submission privileges.

Consultant Standard User ☐
Can view and edit applications for this organization.

Quasi **Government Affiliate** ☐

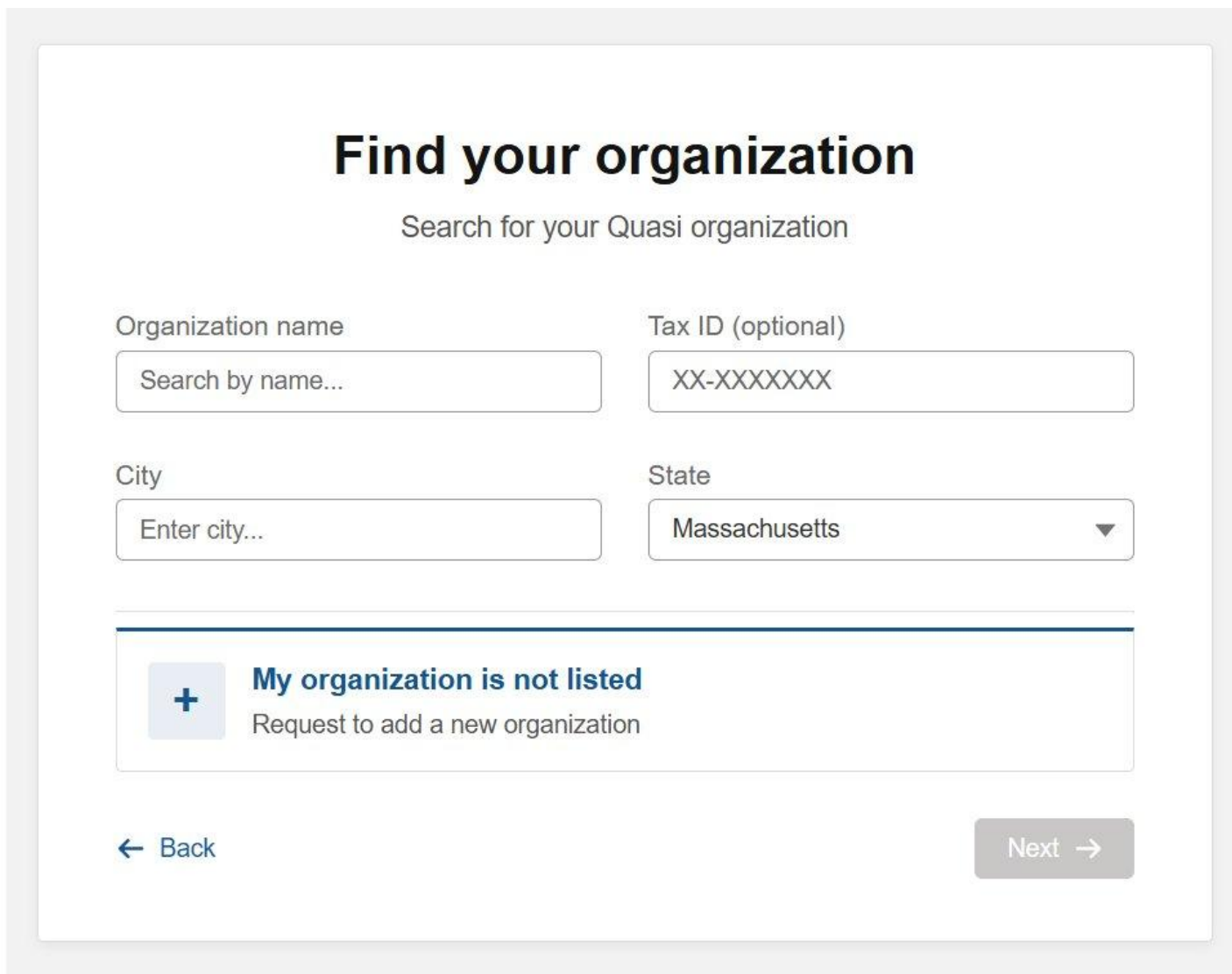
Oversee and regulate housing projects. Quasi-Governmental organizations have special permissions to monitor compliance and funding allocations.

Figure 9 – Select organization type: Consultant selected with role options

After selecting Consultant, choose your role: Consultant Admin (full access including user management) or Consultant Standard User (can view and edit applications). Then click Next.

Step 3 – Find or Create Your Organization

Search for your Consultant organization by name, Tax ID (optional), city, or state. If your organization appears in the results, select it and click Next. If not listed, click My organization is not listed and complete the Request new organization form.



The image shows a web form titled "Find your organization" with the subtitle "Search for your Quasi organization". The form contains four input fields: "Organization name" with a placeholder "Search by name...", "Tax ID (optional)" with a placeholder "XX-XXXXXXX", "City" with a placeholder "Enter city...", and "State" with a dropdown menu currently showing "Massachusetts". Below these fields is a message box with a blue plus icon, the text "My organization is not listed", and a link "Request to add a new organization". At the bottom left is a "Back" button with a left arrow, and at the bottom right is a "Next" button with a right arrow.

Find your organization

Search for your Quasi organization

Organization name

Tax ID (optional)

City

State

Massachusetts ▼

 **My organization is not listed**
Request to add a new organization

[← Back](#) [Next →](#)

Figure 10 – Find your organization search screen

If creating a new organization, provide the Organization name, Tax ID, Address, City, State, Zip Code, Website (optional), and a description of your relationship to the organization. Click Review registration request when complete.

The screenshot displays a web form titled "Organization details" for a consultant. The form includes several input fields: "Organization name" (containing "Test Consultant"), "Organization type" (a dropdown menu set to "Consultant"), "Tax ID" (containing "213131313"), "Address" (containing "Bostn"), "City" (a dropdown menu set to "Boston"), "State" (a dropdown menu set to "Massachusetts"), "Zip Code" (containing "94070"), and "Website (optional)". Below these fields is a text area labeled "* Describe your relationship to this organization" containing the word "Test". At the bottom of the form, there are two buttons: a "Back" button with a left arrow and a "Review registration request" button with a right arrow.

Organization details

* Organization name
Test Consultant

Organization type
Consultant

* Tax ID
213131313

* Address
Bostn

* City
Boston

* State
Massachusetts

* Zip Code
94070

Website (optional)

* Describe your relationship to this organization
Test

← Back Review registration request →

Figure 11 – Request new organization form (Consultant)

Step 4 – Review and Submit Your Registration

Review all your details on the Review your registration screen including User details, Organization, Requested role, and any Additional details or justification. Use the Edit links to correct anything, then click Submit registration.

Review your registration

Review your selection and choose your access level

User details

FIRST NAME

Jon Leung

LAST NAME

consultant

EMAIL ADDRESS

john.leung@consultant@public
housma.io

TITLE

PHONE

6088888801

Organization

ORGANIZATION NAME

Test Consultant

ORGANIZATION TYPE

Consultant

TAX ID

213131313

ADDRESS

Boston

CITY

Boston

STATE

MA

Requested role at this organization

☒ Consultant Admin

Additional details or justification

Test

← Back

Submit registration ✓

Figure 12 – Review your registration screen showing Consultant Admin role

Once submitted, you will see the Registration submitted confirmation screen showing all four steps completed.

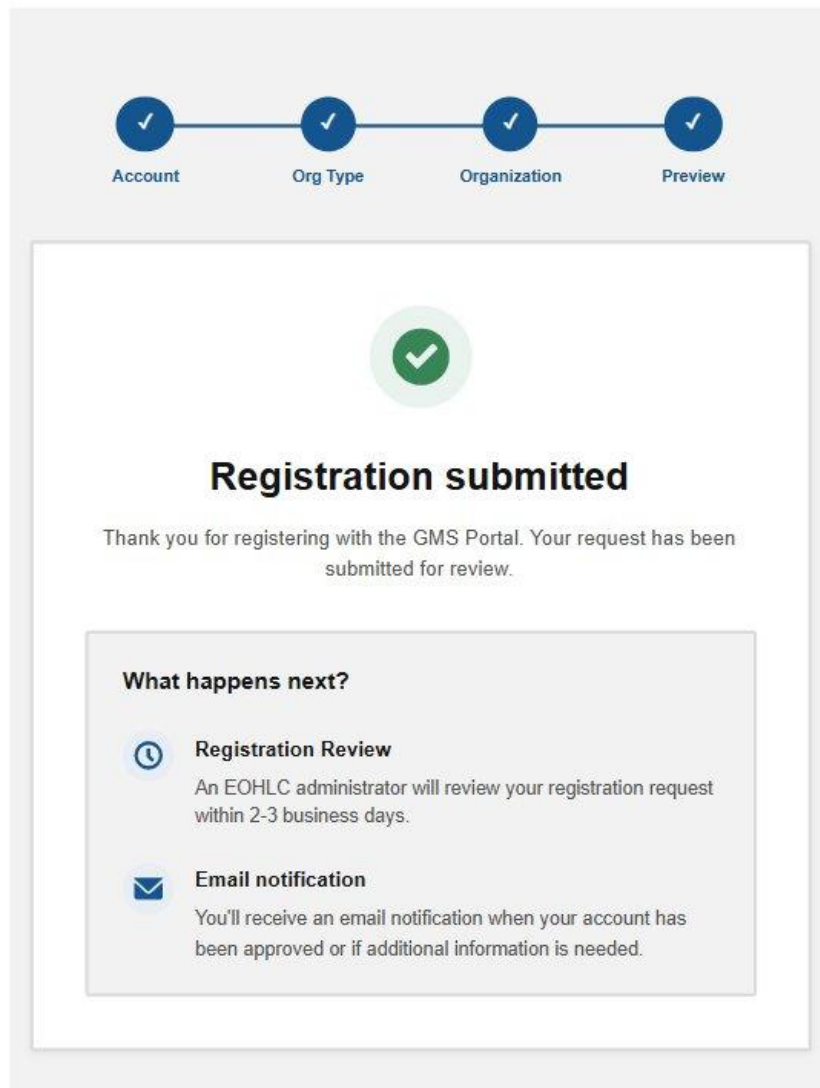


Figure 13 – Registration submitted confirmation screen

Important: Your registration will be reviewed by an EOHLC administrator within 2–3 business days. You will receive an email notification once a decision has been made.

2.3 Step 3 – Await Approval

After submitting your registration, you will immediately receive an acknowledgement email from EOHLC confirming your request is under review.

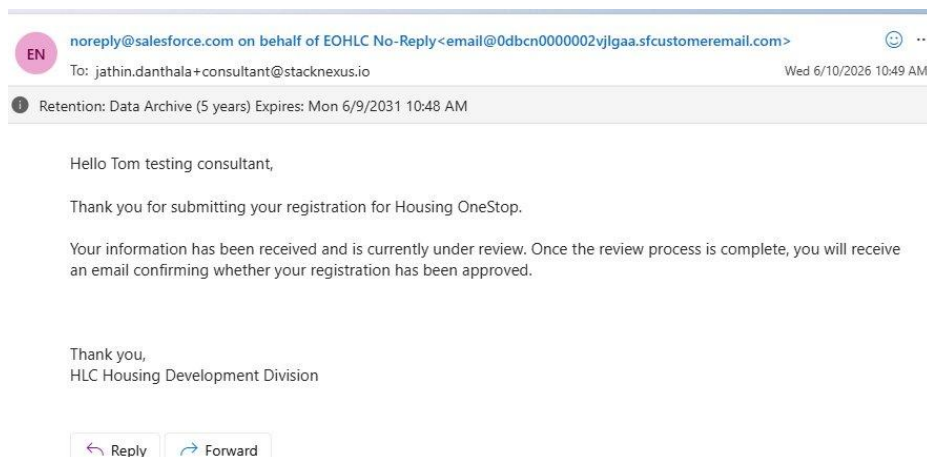


Figure 14 – Registration acknowledgement email from EOHLC

- Consultant Admin registrations are reviewed by EOHLC Super Admins or Admins.
- Consultant Standard User registrations are reviewed by the Consultant Admin of their organization.

You will receive a second email once your request has been actioned. If approved, the email will contain a link to access the portal.

Tip: If you do not receive an email within a reasonable time, check your spam or junk folder. Contact your Consultant Admin (Standard Users) or EOHLC (Consultant Admins) if needed.

2.4 Step 4 – Log In to the Housing OneStop Portal

Once your registration has been approved, you will receive an approval email from EOHLC with a link to get started.

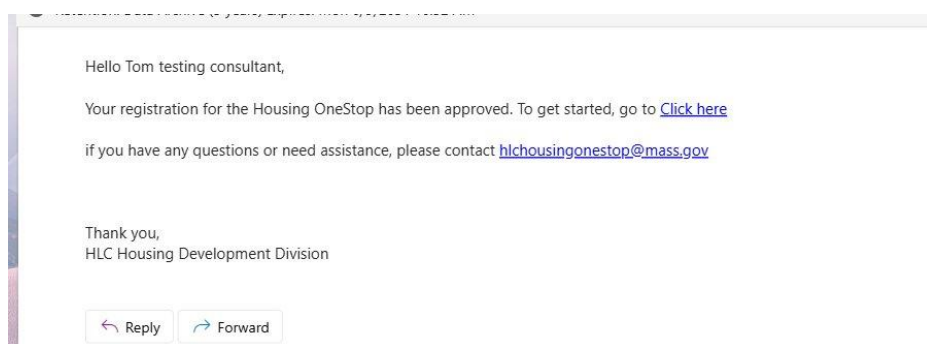


Figure 15 – Approval email from EOHLC with link to Housing OneStop portal

Steps

5. Click the link in your approval email, or navigate directly to the Housing OneStop portal login page.
6. Click Log In and authenticate using your MyMassGov credentials.
7. You will be taken to the portal home screen with the full navigation menu: Home, Funding Rounds, Projects, Pre Applications, Full Applications, and User Management.

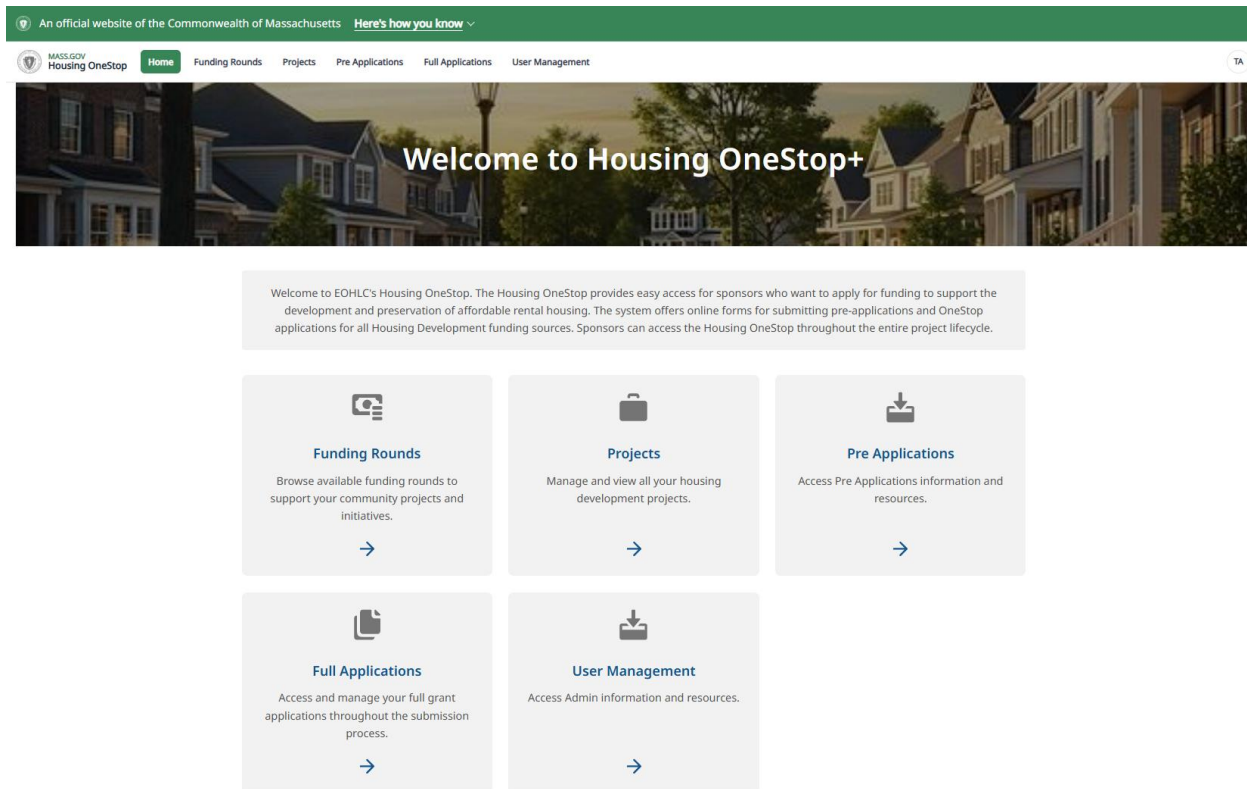


Figure 16 – Housing OneStop portal home screen after login

Tip: After your first login, you will be routed directly to the portal home screen on each subsequent login.

3. Quick Reference – Registration and Login Summary

3.1 First-Time Setup Process Summary

Step	Action	Notes
1	Create MyMassGov account	Enter email, verify with code, add name, set password.

Step	Action	Notes
2	Complete GMS registration	Select Consultant org type, choose role, find or create org.
3	Await approval	Consultant Admin requests reviewed by EOHLC. Standard User requests reviewed by Consultant Admin.
4	Receive confirmation email	Approval or rejection notification sent by email.
5	Log in to Housing OneStop	Use MyMassGov credentials to access your assigned projects.

3.2 Help and Support

Issue	Resolution
Registration approval email not received	Check spam folder. Contact your Consultant Admin (Standard Users) or EOHLC (Consultant Admins).
Registration request rejected	Contact your Consultant Admin or EOHLC for clarification and guidance on re-applying.
Cannot find your organization during registration	Select My organization is not listed and enter your organization's details to create a new record.
Forgot MyMassGov password	Use the Forgot Password option on the MyMassGov login page.
Cannot access portal after approval	Ensure you are using the same MyMassGov credentials used during registration. Contact EOHLC if the issue persists.

MODULE 2 – CONSULTANT ADMIN

1. User Management

As a Consultant Admin, you are responsible for managing users within your organization — approving or rejecting registration requests, activating or deactivating users, and assigning projects to your team members.

1.1 Navigating to User Management

From anywhere within the Housing OneStop portal, click User Management in the main navigation menu. The User Management section contains three sub-tabs:

- **User Registration** — Displays all registration requests submitted by users who selected your organization. Use this tab to approve or reject pending requests.
- **User Management** — Displays all active and inactive users within your organization. Use this tab to activate, deactivate, and manage existing users.
- **Organization Management** — Displays and allows management of your organization's details within the GMS portal.

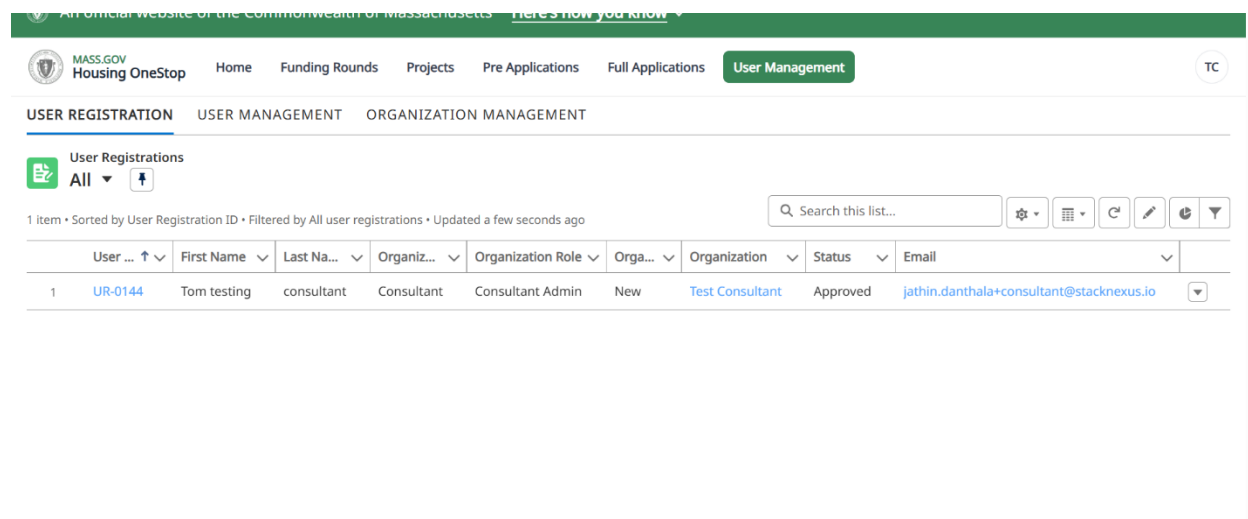


Figure 17 – User Registration sub-tab showing registration requests

1.2 Approving or Rejecting Registration Requests

When a Consultant Standard User registers and selects your organization, their request will appear under the User Registration sub-tab for your review.

Steps

8. Navigate to User Management and click the User Registration sub-tab.
9. Locate the pending registration request (Status: Pending).
10. Click the User Registration ID to open the request details.
11. Review the applicant's name, organization type, role, and email address.
12. Click Approve to grant access, or Reject to deny the request.
13. The applicant will receive an automated email notification confirming the outcome.

User Registration
UR-0154

First Name: Johnson, Last Name: Adames, Organization Role: Consultant Standard User, Email: jathin.danthala+1231@stacknexus.io

Progress: Pending (selected), Approved, Rejected

DETAILS

Applicant Information

User Registration ID	Title
UR-0154	
Prefix	First Name
	Johnson
Middle Name	Last Name
	Adames
Email	Phone
jathin.danthala+1231@stacknexus.io	(650) 666-9891

Approval History (2)

User Registration Approval

Date: 6/25/2026, 12:17 PM
Status: Pending
Assigned To: HDD User Registration Approval Queue
Actual Appro...: HDD User Registration Approval Queue
Comments:

Approval Request Submitted

Date: 6/25/2026, 12:17 PM
Status: Submitted
Assigned To: Johnson Adames

Buttons: Approve, Reject, Reassign

Note: Only Consultant Standard User registrations are directed to the Consultant Admin for approval. Consultant Admin registrations are reviewed and approved by EOHLC.

1.3 Activating and Deactivating Users

Consultant Admins can activate or deactivate Consultant Standard Users within their organization. Deactivating a user removes their portal access without deleting their account.

Steps

14. Navigate to User Management and click the User Management sub-tab.
15. Locate the user you want to activate or deactivate.
16. Click the user's name to open their user record.
17. Click Activate or Deactivate as appropriate and confirm the action.

MASS.GOV Housing OneStop Home Funding Rounds Projects Pre Applications Full Applications **User Management** TC

USER REGISTRATION **USER MANAGEMENT** ORGANIZATION MANAGEMENT

Search users

Search by name or email... 1 user(s)

NAME ▲	EMAIL ▴	DATE ADDED ▴	LAST ACTIVE ▴	ORGANIZATION ROLE ▴	STATUS ▴	ACTIONS
Johnson Adames	jathin.danthala+1231@stacknexus.io	Jun 25, 2026	Jun 25, 2026	Consultant Standard User	ACTIVE	Deactivate Assign Project

Showing 1-1 of 1 -- Previous Page 1 of 1 Next --

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Tip: Deactivating a user prevents them from logging in but retains their account and history. You can reactivate at any time.

1.4 Managing Your Organization Details

The Organization Management sub-tab displays your organization's registered details. Consultant Admins can edit these using the Edit button in the top-right corner.

Steps

18. Navigate to User Management and click the Organization Management sub-tab.
19. Click Edit in the top-right corner to enter edit mode.
20. Update the relevant fields and save your changes.

MASS.GOV Housing OneStop Home Funding Rounds Projects Pre Applications Full Applications **User Management** TC

USER REGISTRATION USER MANAGEMENT **ORGANIZATION MANAGEMENT**

ORGANIZATION DETAILS

ORGANIZATION NAME
Test Consultant

TAX ID
213131313

ORGANIZATION TYPE
Consultant

WEBSITE

ADDRESS

STREET ADDRESS
Boston

CITY
Boston

STATE
MA

ZIP CODE

ADDITIONAL INFORMATION

RELATIONSHIP TO ORGANIZATION

Edit

Tip: Keep your organization's details up to date — particularly the address and Tax ID — as these are used by EOHLC to verify your organization's identity.

Note: EOHLC Super Admins and Admins can assign projects to Consultant users from the GMS. Sponsor Admins can assign projects from the User Access tab on the project record in the portal. The access context (Sponsor Side or EOHLC Side) determines the level of access granted.

2. Reviewing Projects and Applications

Consultant Admins have access to all projects assigned to their organization. Projects assigned by EOHLC provide read-only access to submitted applications. Projects assigned by a Sponsor Admin provide full edit access to all pre-apps and full apps.

2.1 Navigating to Projects

Click Projects in the main navigation menu. The list view displays all projects assigned to your organization, showing Project ID, Project Name, Status, Sponsor Organization, and Created Date.

Project ID ↑	Project Name	Status	Sponsor Organization	Created Date
1 PRJ-000099	Test Northgate Housing Development	In Construction	Test Delta Contracting	5/22/2026, 2:24 AM
2 PRJ-000110	Project May27	In Construction	Dennis Housing Authority	5/27/2026, 12:25 PM
3 PRJ-000116	Test Village Development Program	Full Application Submitted	Test Delta Contracting	6/9/2026, 2:47 AM

Figure 19 – Projects list view showing assigned projects

2.2 Viewing a Project Record

Click any Project ID or project name to open the project record. The record displays the project lifecycle status tracker at the top and contains three tabs:

- Details — Core project information including Project ID, Project Name, Project Entail, Status, and Description.
- Pre Applications — Lists all Preliminary Application References (PARs) associated with the project.
- Full Applications — Lists all Full Applications (APPs) associated with the project.

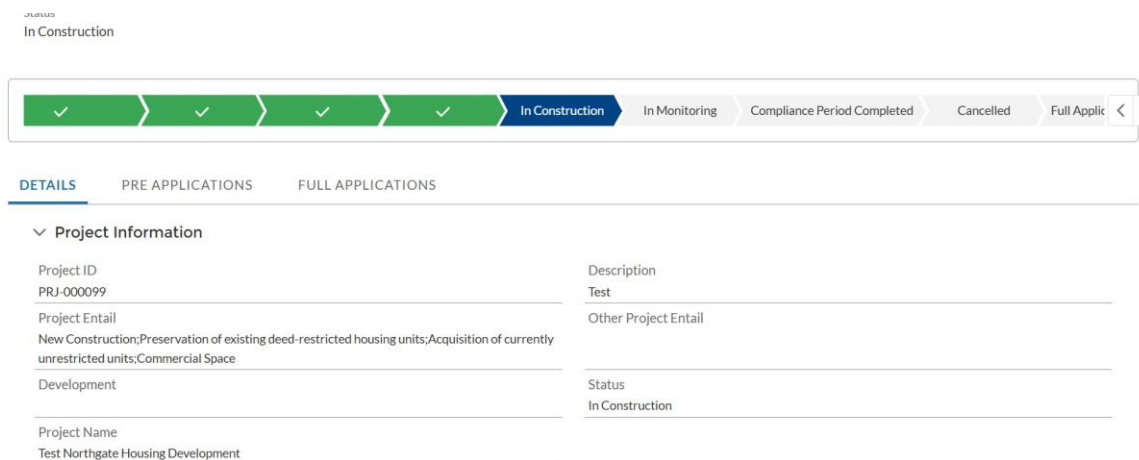


Figure 20 – Project record showing the Details tab and project lifecycle status tracker

2.3 Reviewing Pre-Applications (EOHLC Side)

When assigned by EOHLC, Consultant users can review all submitted pre-applications associated with that project.

Steps

21. Open the relevant project record and click the Pre Applications tab.
22. Click the PAR ID to open the pre-application record.

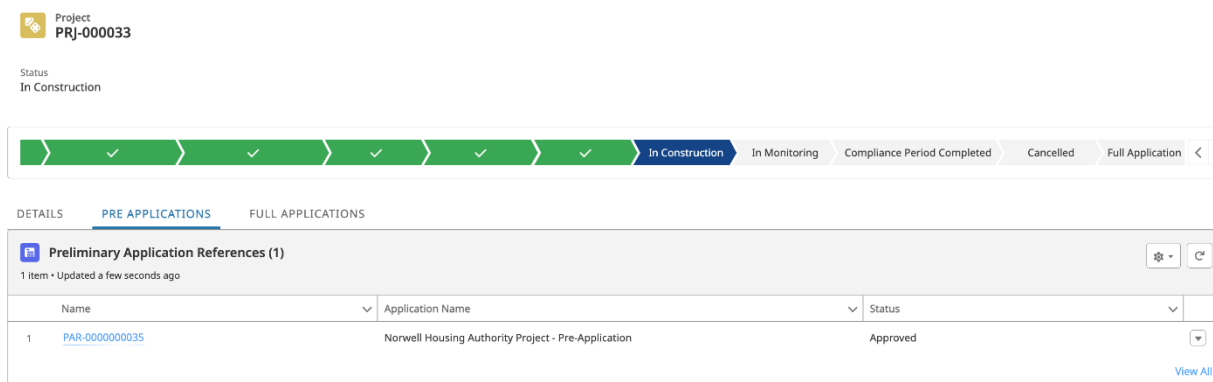


Figure 21 – Pre Applications tab showing Preliminary Application References

23. The pre-application record opens with the following tabs:

- Application View — Structured view of the pre-application including General Information, Site Map Interface, Project Characteristics, Funding Sources, Project Entitlement, CBH Information, and FCF Information.
- Documents — Documents uploaded by the sponsor.

The screenshot displays the 'Preliminary Application Reference' (PAR-0000000035) interface. At the top, there are buttons for 'Resume Pre-App', 'Clone Pre-App', and 'Apply For Full-App'. Below this, a progress bar shows the application status: 'Approved' (green) and 'Denied' (grey). The 'APPLICATION VIEW' tab is active, showing a 'Pre-Application' form. The form has tabs for 'General Information', 'Site Map Interface', 'Project Characteristics', 'Funding Sources', and 'Project Entitlement'. The 'General Information' tab is selected, showing fields for 'Project Name' (Norwell Housing Authority Project), 'Sponsor Point of Contact' (Name: Pranaya SA, Email: pranaya.etta+2612@stacknexus.io, Phone:), and 'Project Partners'.

Figure 22 – Pre-application record showing Application View tabs and action buttons

Important: When accessing pre-applications in the EOHLC Side context, Consultant users have read-only access. Editing is only available when assigned by a Sponsor Admin (Sponsor Side).

2.4 Editing Pre-Applications on Behalf of a Sponsor (Sponsor Side)

When a Sponsor Admin assigns a Consultant user to a project from the User Access tab of the project record, the Consultant gains the ability to edit pre-applications and full applications on behalf of that sponsor.

Steps

24. Open the relevant project record and click the Pre Applications tab.
25. Click the PAR ID to open the pre-application record.
26. Open the pre-application record by clicking the PAR ID, then click the Resume Pre-App button at the top-right to enter edit mode.

Preliminary Application Reference
PAR-0000000018

Project: PRJ-000016 Status: In Progress Created Date: 6/12/2026, 6:09 PM

[Resume Pre-App](#) [Clone Pre-App](#) [Apply For Full-App](#)

Progress: In Progress | Submitted | Approved | Denied

APPLICATION VIEW | DOCUMENTS

Pre-Application

General Information | Site Map Interface | Project Characteristics | Funding Sources | Project Entitlement

Project Name
UAT Project-13

Sponsor Point of Contact

Name: Pranaya SA Email: pranaya.etta+2612@stacknexus.io Phone:

Project Partners

ROLE	PARTNER

27. Record opens in edit mode and can make changes across all tabs.

Pre Application Form

Complete each section of the application. Your progress is saved automatically as you advance.

Parcel Selection Step 2 of 5

For scattered sites, please select one representative parcel

[Clear Selection](#) [Zoom to Selection](#)

Find address or place

Parcel Information

Assessor's Parcel ID	0302391000
Address	216 228 Hanover ST
City	BOSTON
Owner	PIZZUTI DONATO F

General Information

2 Parcel Selection

3 Project Characteristics

4 Funding Sources

5 Project Entitlement

28. Make the required changes and save. To discard changes, exit without saving.

The screenshot shows a web application form for project submissions. A red error box is displayed in the center, stating: "Error: Consultant users don't have permission to submit Pre Applications." The form includes sections for "Other development partner fee simple ownership" (with options like "Under agreement with commitment to purchase", "Option agreement (purchase)", and "Executed long-term lease"), "What regulatory approvals are needed for the project?" (with "Available Approvals" and "Selected Approvals" lists), and "Has an ASTM Phase 1 been completed?". Navigation buttons at the bottom include "< Previous", "Save Draft", and "Submit Application". A sidebar on the right shows progress for "Project Characteristics", "Funding Sources", and "Project Entitlement". The footer contains the Commonwealth of Massachusetts logo, navigation links, and copyright information.

Important: Consultant users can edit applications on behalf of the sponsor but cannot submit them. Only the Sponsor Admin or Sponsor Standard User can submit. Always confirm with the sponsor before saving changes.

2.5 Reviewing Full Applications (EOHLC Side)

When assigned by EOHLC, Consultant users can review submitted full applications associated with assigned projects.

Steps

29. Open the relevant project record and click the Full Applications tab.
30. Click the APP ID to open the full application record. The record contains:
 - Application View — Includes Summary Page, General Information, Development Team, Site Map Interface, Building Info Page, Preservation, Sources, Uses, Income, Expenses and Cash Flow, Permitting and Entitlement, Due Diligence, Tax Credit Basis, and Green Checklist.

Full Application
APP-0000000038

Resume Full App Request Closing Create Requisition

Saved Application Reference: PAR-0000000052 Project: PRJ-000048 Applied Date: 7/5/2026, 8:00 PM Application Status: Submitted

Submitted Awarded Closing Requested Closing In Construction In Monitoring Compliance Period Completed Cancelled Denied

APPLICATION VIEW DOCUMENTS REQUISITIONS

Summary Page General Information Development Team Site Map Interface Building Info Page Preservation Sources Uses Income Expenses and Cash Flow Permitting and Entitlement Due Diligence Tax Credit Basis Green Checklist

Project Name: Test Project-6 Parent Development:

Project Identifier: PRJ-000048 Address:

Municipality: Sponsor: Test Organization 6

Sponsor Contact: testTE testty@gmail.com 4563784535 Project Type(s): Preservation of existing deed-restricted housing units Adaptive Reuse of a nonresidential structure

Housing Type(s): Transitional housing Funding Round: Test Community Housing June 2026 - Round 1

Project Parcels: 0301672000 Total # of Units: 50

Total # of Affordable Units: 50 Commercial square footage: 2

Pre-App Submitted: Jul 05, 2026 Application Submitted: Jul 05, 2026

Date Awarded: Dated Closed:

Placed In Service: Jul 12, 2027 Project Description: Complete each section of the application. Your progress is saved automatically as you advance.

Funding Matrix

FUNDING SOURCE	REQUESTED	CLOSING AWARD	POST CLOSING AWARD	TOTAL AWARD
----------------	-----------	---------------	--------------------	-------------

- Documents — Documents uploaded by the sponsor.

APPLICATION VIEW DOCUMENTS REQUISITIONS

Document Uploads

Documents

Search documents by name, or filter by category, subcategory, document type.

Search by name... All Categories All Subcategories All Types

DOCUMENT NAME	CATEGORY	SUBCATEGORY	DOCUMENT TYPE	NOTE	FILE SIZE	UPLOAD DATE	ACTIONS
Dummy GMS copy 3	Legal	40B Site Eligibility Documentation	Photos of site and surrounding buildings		13.0 KB	2026-06-15	View Download
Dummy GMS copy 4	Monitoring/Compliance	MBE/WBE & Section 3	Exh 32.1 Equal Opportunity Information and Questionnaire		13.0 KB	2026-06-15	View Download
Dummy GMS copy 6	Drawing & Specifications	Preliminary Drawings & Specifications	Building Plans		13.0 KB	2026-06-15	View Download

- Requisitions — Visible once the application has reached In Construction or In Monitoring status.

APPLICATION VIEW DOCUMENTS REQUISITIONS

Requisitions (2)

Requisition Name	Requisition Number	Status	Requisition Date
Req-00007	1	Approved	6/5/2026
Req-00009	2	Approved	6/5/2026

Important: In the EOHLC Side context, Consultant users have read-only access to full applications.

2.6 Editing Full Applications on Behalf of a Sponsor (Sponsor Side)

When assigned by a Sponsor Admin, Consultant users can edit full applications on behalf of the sponsor.

Steps

31. Open the relevant project record and click the Full Applications tab.

DETAILS PRE APPLICATIONS FULL APPLICATIONS			
Business License Applications (1)			
Application ID	Account	Contact Email	Applied Date
APP-0000000138	Test Organization 6	testy@gmail.com	7/5/2026, 8:00 PM
View All			

32. Click the APP ID to open the full application record.

33. Open the full application record by clicking the APP ID, then click the Resume Full App button at the top-right to enter edit mode.

Full Application
APP-0000000036

[Resume Full App](#)
[Request Closing](#)
[Create Requisition](#)

Saved Application Reference
PRJ-0000000047

Project
PRJ-000043

Applied Date
6/25/2026, 8:00 PM

Application Status
In Progress

In Progress

Submitted

Awarded

Closing Requested

Closing

In Construction

In Monitoring

Compliance Period Completed

Cancelled

Denied

APPLICATION VIEW

DOCUMENTS

REQUISITIONS

Summary Page

General Information

Development Team

Site Map Interface

Building Info Page

Preservation

Sources

Uses

Income

Expenses and Cash Flow

Permitting and Entitlement

Due Diligence

Tax Credit Basis

Green Checklist

Project Name:

UAT Project-26

Parent Development:

Project Identifier:

PRJ-000043

Address:

Municipality:

Sponsor:

EOHLC SN Organization

Sponsor Contact:

Project Type(s):

Housing Type(s):

Funding Round:

Test Community Housing June 2026 - Round 1

Project Parcels:

Total # of Units:

0

Commercial square footage:

0

Total # of Affordable Units:

0

Pre-App Submitted:

Application Submitted:

Jun 25, 2026

Date Awarded:

Dated Closed:

Placed In Service:

Project Description:

Total Development Cost:

Total Development Cost per unit:

EOHLC Notes:

34. The full application opens in edit mode via the Resume Full App button. Make the required changes across any tab and save.

Full Application Form

Complete each section of the application. Your progress is saved automatically as you advance.

[Download Application Template](#)

Upload crosswalk file

[Upload Files](#) Or drop files

General Information

Step 1 of 14

What is the name of the project?

UAT Project-13

Describe the project

each section of the application

Are you applying under non-profit set aside?

☐ Yes
☒ No

What is involved in this project?

Available

Preservation of existing deed-restricted housing units

Acquisition of currently unrestricted units

Rehabilitation of existing housing units/structures

Adaptive Reuse of a nonresidential structure

Selected

New Construction

Commercial Space

1 General Information

2 Development Team

3 Parcel Selection

4 Parcel Details

5 Preservation

13 Override Calculated Fields

14 Document Upload

Save Draft Save Application

Important: Consultant users cannot submit full applications. Submission remains the sole responsibility of the Sponsor Admin or Sponsor Standard User.

2.7 Reviewing Requisitions

Once a full application has reached In Construction or In Monitoring status, Consultant users can view requisitions from the Requisitions tab on the full application record.

Steps

35. Open the relevant full application record and click the Requisitions tab.
36. The tab displays all requisitions showing Requisition Name, Requisition Number, Status, and Requisition Date.

APPLICATION VIEW DOCUMENTS **REQUISITIONS**

Requisition Name	Requisition Number	Status	Requisition Date
Req-00007	1	Approved	6/5/2026
Req-00009	2	Approved	6/5/2026

Figure 25 – Requisitions tab showing the list of requisitions

37. Click a Requisition Name to open the individual requisition record. It contains three tabs:
 - Details — Borrower, Requisition Number, Project Name, Requisition Date, Status, and Line Items table.
 - Summary — Residential and Commercial Budget Summaries by cost category plus a By Funding Source breakdown.
 - Documents — Any documents attached to the requisition.

 Requisition
Req-00009

Requisition Number
2

Status
Approved

Business License Application
[BLA-0000000005](#)

DETAILS SUMMARY DOCUMENTS

BORROWER Blanche Associates	REQUISITION # 2	PROJECT NAME Test Project	REQUISITION DATE 6/5/2026	STATUS APPROVED
---------------------------------------	---------------------------	-------------------------------------	-------------------------------------	---------------------------

Line Items										
#	CATEGORY	SUBCATEGORY	PAYEE	INVOICE DATE	DESCRIPTION	FUNDING SOURCE	INVOICE AMOUNT	AMEND REQUISITION	REVISION COMMENTS	COMMERCIAL
1	Direct Construction Costs	Direct Construction	bob	2026-06-24	test	CBH	\$1.25			
Total										\$1.25

Figure 26 – Requisition record — Details tab showing line items

DETAILS

SUMMARY

DOCUMENTS

Residential Budget Summary

COST	ORIGINAL BUDGET	CURRENT APPROVED BUDGET	PROPOSED BUDGET CHANGES	PROPOSED REVISED BUDGET	PREVIOUS REQUISITIONS	THIS REQUISITION	TOTAL REQUEST TO DATE	% DRAWN TO DATE	BALANCE TO COMPLETE
DIRECT CONSTRUCTION COSTS									
SUBTOTAL	\$3.00	\$3.00	\$777.00	\$780.00	\$0.00	\$0.00	\$0.00	0.00%	\$780.00
ACQUISITION									
SUBTOTAL	\$0.00	\$0.00	\$77.00	\$77.00	\$0.00	\$0.00	\$0.00	0.00%	\$77.00
CONSTRUCTION CONTINGENCY									
SUBTOTAL	\$0.00	\$0.00	\$77.00	\$77.00	\$0.00	\$0.00	\$0.00	0.00%	\$77.00
GENERAL DEVELOPMENT COSTS									
SUBTOTAL	\$0.00	\$0.00	\$77.00	\$77.00	\$0.00	\$0.00	\$0.00	0.00%	\$77.00
RESERVES, OVERHEAD, FEE									
SUBTOTAL	\$0.00	\$0.00	\$77.00	\$77.00	\$0.00	\$0.00	\$0.00	0.00%	\$77.00
TOTAL	\$3.00	\$3.00	\$1,085.00	\$1,088.00	\$0.00	\$0.00	\$0.00	0.00%	\$1,088.00

Commercial Budget Summary

COST	ORIGINAL BUDGET	CURRENT APPROVED BUDGET	PROPOSED BUDGET CHANGES	PROPOSED REVISED BUDGET	PREVIOUS REQUISITIONS	THIS REQUISITION	TOTAL REQUEST TO DATE	% DRAWN TO DATE	BALANCE TO COMPLETE
DIRECT CONSTRUCTION COSTS									
SUBTOTAL	\$3.00	\$3.00	\$77.00	\$80.00	\$0.00	\$30,000.00	\$30,000.00	166666.67%	-\$49,920.00
ACQUISITION									
SUBTOTAL	\$0.00	\$0.00	\$77.00	\$77.00	\$0.00	\$0.00	\$0.00	0.00%	\$77.00
CONSTRUCTION CONTINGENCY									
SUBTOTAL	\$0.00	\$0.00	\$77.00	\$77.00	\$0.00	\$0.00	\$0.00	0.00%	\$77.00
GENERAL DEVELOPMENT COSTS									
SUBTOTAL	\$0.00	\$0.00	\$77.00	\$77.00	\$0.00	\$0.00	\$0.00	0.00%	\$77.00
RESERVES, OVERHEAD, FEE									
SUBTOTAL	\$0.00	\$0.00	\$77.00	\$77.00	\$0.00	\$0.00	\$0.00	0.00%	\$77.00

Figure 27 – Requisition Summary tab — Residential and Commercial Budget Summary

Commercial Budget Summary											
COST	ORIGINAL BUDGET	CURRENT APPROVED BUDGET	PROPOSED BUDGET CHANGES	PROPOSED REVISED BUDGET	PREVIOUS REQUISITIONS	THIS REQUISITION	TOTAL REQUEST TO DATE	% DRAWN TO DATE	BALANCE TO COMPLETE		
DIRECT CONSTRUCTION COSTS											
SUBTOTAL	\$3.00	\$3.00	\$77.00	\$80.00	\$0.00	\$50,000.00	\$50,000.00	1666666.67%	-\$49,920.00		
ACQUISITION											
SUBTOTAL	\$0.00	\$0.00	\$77.00	\$77.00	\$0.00	\$0.00	\$0.00	0.00%	\$77.00		
CONSTRUCTION CONTINGENCY											
SUBTOTAL	\$0.00	\$0.00	\$77.00	\$77.00	\$0.00	\$0.00	\$0.00	0.00%	\$77.00		
GENERAL DEVELOPMENT COSTS											
SUBTOTAL	\$0.00	\$0.00	\$77.00	\$77.00	\$0.00	\$0.00	\$0.00	0.00%	\$77.00		
RESERVES, OVERHEAD, FEE											
SUBTOTAL	\$0.00	\$0.00	\$77.00	\$77.00	\$0.00	\$0.00	\$0.00	0.00%	\$77.00		
TOTAL	\$3.00	\$3.00	\$385.00	\$388.00	\$0.00	\$50,000.00	\$50,000.00	1666666.67%	-\$49,612.00		

By Funding Source							
FUNDING SOURCE	ORIGINAL BUDGET	PREVIOUS REQUISITIONS	THIS REQUISITION	TOTAL DRAWN TO DATE	% DRAWN	BALANCE REMAINING	
4% Federal LIHTC	--	\$0.00	\$50,000.00	\$50,000.00	--	--	
4% LIHTC	\$555.00	\$0.00	\$0.00	\$0.00	0.00%	\$555.00	
AHTF	\$555.00	\$0.00	\$0.00	\$0.00	0.00%	\$555.00	
EOHLC Subsidy	\$55.00	\$0.00	\$0.00	\$0.00	0.00%	\$55.00	
tax2222	\$2,222.00	\$0.00	\$0.00	\$0.00	0.00%	\$2,222.00	
TOTAL	--	\$0.00	\$50,000.00	\$50,000.00	--	--	

Figure 28 – Requisition Summary tab — By Funding Source breakdown

Note: Consultant users can view all requisition details but cannot approve or reject them. Requisition approvals are handled exclusively by EOHLC staff.

2.8 Generating and Downloading the Application Summary PDF

An Application Summary PDF can be generated for any pre-application or full application using the Generate PDF button available on both the Pre-Application and Full Application pages.

Steps

38. Open the pre-application or full application record.
39. Click the Generate PDF button on the application page.

MASS.GOV Housing OneStop | Home | Funding Rounds | **Projects** | Pre Applications | Full Applications | User Management | PS

Preliminary Application Reference
PAR-0000000018

Project: [4-000016](#) | Status: In Progress | Created Date: 6/12/2025, 6:09 PM

Resume Pre-App | Clone Pre-App | Apply For Full-App | **Generate PDF**

Application Progress

In Progress | Submitted | Approved | Denied

Application View | DOCUMENTS

Pre-Application

General Information | Site Map Interface | Project Characteristics | Funding Sources | Project Entitlement | FCF Information

Project Name
UAT Project-13

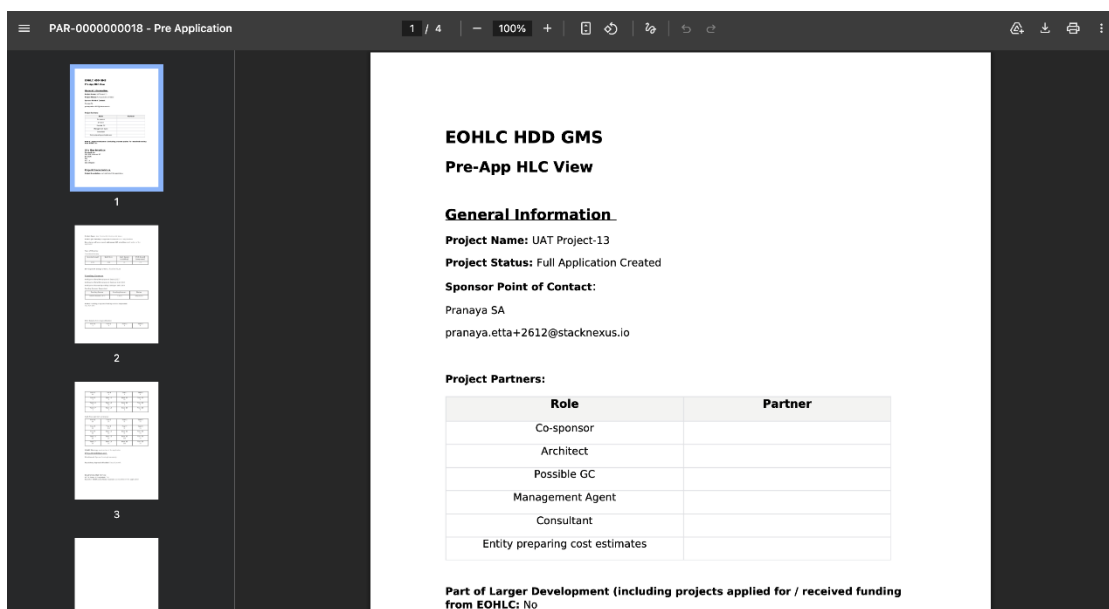
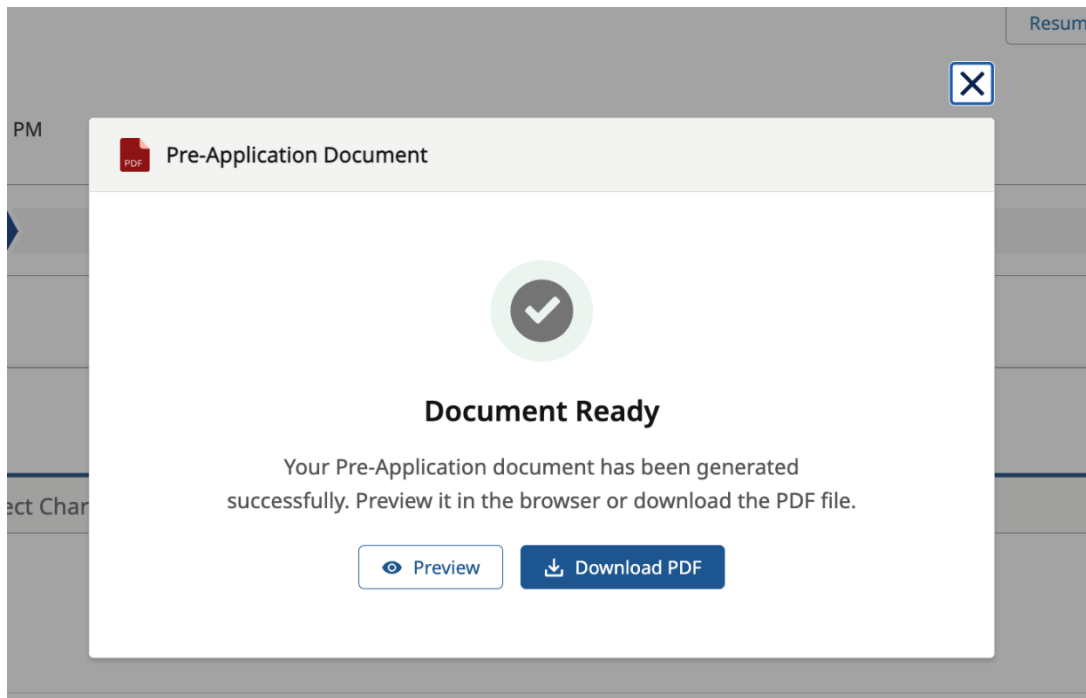
Sponsor Point of Contact

Name: Pranaya SA | Email: pranaya.etta+2612@stacknexus.io | Phone:

Project Partners

OWNER | PARTNER

40. Once generated, download the PDF to your device.



Tip: The Application Summary PDF reflects the application content at the time it is generated. Generate a new PDF after any changes have been saved to get the most up-to-date version.

MODULE 3 – CONSULTANT STANDARD USER

1. Overview

As a Consultant Standard User, your primary role in the Housing OneStop portal is to review and, where assigned by a Sponsor Admin, edit projects and applications assigned to you. You do not have user management responsibilities — those are handled by your Consultant Admin.

Like Consultant Admins, you may operate in two contexts: the Sponsor Side (where you can edit applications on behalf of the sponsor) and the EOHLC Side (where you have read-only access to submitted applications). The context is determined by who assigned the project to you.

Note: The registration and first login process for Consultant Standard Users is covered in Module 1. Please refer to that module if you have not yet completed your registration.

2. Accessing Your Assigned Projects

When you log in to the Housing OneStop portal, your home screen will display the projects currently assigned to you.

2.1 Navigating to Projects

Click Projects in the main navigation menu to view all projects currently assigned to you, showing Project ID, Project Name, Status, Sponsor Organization, and Created Date. Click any project name or Project ID to open the project record.

2.2 Viewing a Project Record

Clicking a project opens the full project record. The tabs and content are identical to those described for Consultant Admins in Module 2, Section 2.2.

Note: You will only see projects that have been explicitly assigned to you by a Sponsor Admin, or EOHLC. If a project is missing, contact your Consultant Admin.

3. Reviewing and Editing Applications

The process for reviewing and editing applications, reviewing requisitions, and generating PDFs is identical for Consultant Standard Users and Consultant Admins. Please refer to the following sections in Module 2:

Task	Refer To
Reviewing pre-applications (EOHLC Consultant)	Module 2, Section 2.3
Editing pre-applications on behalf of a sponsor (Sponsor Consultant)	Module 2, Section 2.4
Reviewing full applications (EOHLC Consultant)	Module 2, Section 2.5
Editing full applications on behalf of a sponsor (Sponsor Consultant)	Module 2, Section 2.6
Reviewing requisitions	Module 2, Section 2.7
Generating and downloading the Application Summary PDF	Module 2, Section 2.8

Important: Consultant Standard Users cannot submit applications — that action remains with the Sponsor Admin or Sponsor Standard User. Always confirm with the sponsor before saving edits.