

SHERA Application Data Fields INSTRUCTIONS

Updated as of 5/19/2021

In order to submit an application for multiple tenant claims through SHERA, owners (or their representatives) will need to collect and organize data about all of the eligible tenants with arrearages. The data can then be uploaded all at once through the SHERA portal, so that multiple claims for a single property can be processed efficiently.

Each category of information is known as a “Data Field.” All of the required data fields are included in the “SHERA Application Data Fields” spreadsheet available on the SHERA Portal (under the heading “Application Materials”).

How to use the spreadsheet

You can fill in all the data on the spreadsheet directly. Alternatively, you can create a report from your property management or accounting system that will provide this information. As long as the report is in .xls, .xlsx, or .csv format, you can import that report directly into the SHERA portal.

The import will be easiest if you can design your report so that the heading names match exactly the names in the Application Data Fields spreadsheet. For example, the field that asks for the tenant’s first name should be formatted exactly as it is on the spreadsheet:

Head_of_Household_First_Name

If you match the column titles exactly, then you’ll have a very fast option for matching the fields automatically when you upload the data. If not, the upload is still possible; it will just take a little manual matching on your part, adding a few extra minutes to the process.

Some of the data fields will clearly reside in your accounting/property management systems, such as tenant name and address and arrearage information. Other information may need to be collected during your interactions with the tenant during the course of preparing the application, and entered manually. Many of these fields are included in Tenant Certification of Rental Assistance Eligibility form to make collection simpler for you; data requested on the Certification form will be noted in the table below.

Data Fields

You will need the following information in a spreadsheet or .csv file in order to submit your application:

| Data | Description and tips | Required/Optional | Format |
|--------------------|---|-------------------|------------------------------|
| Project ID | Project number that you will be sent along with your invitation to the portal | Required | Number, including any dashes |
| Unit Number | Apartment number, as it appears in the US Postal Service mailing address (e.g., | Required | Number |

| Data | Description and tips | Required/Optional | Format |
|-------------------------------------|---|-------------------|-------------------|
| | 2B). This may not correspond exactly to the unit identifier in your data system; but your application will move more smoothly to the system if you change the unit number to match the mailing address before submission. | | |
| Street Address | Building number and street name; it is NOT NECESSARY to repeat the unit number | Required | Text |
| City | City or town | Required | Text |
| State | MA | Required | MA |
| Zip | Zipcode | Required | Number |
| Head of Household First Name | First name of the primary tenant | Required | Text |
| Head of Household Last Name | Last name of the primary tenant | Required | Text |
| Head of Household Initial | Middle initial of primary tenant (optional) | Optional | Text |
| Head of Household DOB | Date of birth of Head of Household. This information is included on the Tenant Certification. | Required | Text |
| Head of Household Last 4 SSN | Last four digits of primary tenant's social security number. This information is included on the Tenant Certification. Tenants who do not have a social security number are still eligible to apply for SHERA. If the tenant does not have a social security number, enter 9999. | Required | Number (4 digits) |
| Head of Household Gender | Gender of primary tenant. If the tenant chooses not to share this information, please indicate "choose not to respond." This information is included on the Tenant Certification. | Required | Text |
| Head of Household Race | Race of primary tenant. If the tenant chooses not to share this information, please indicate "choose not to respond." This information is included on the Tenant Certification. | Required | Text |
| Head of Household Ethnicity | Race of primary tenant. If the tenant chooses not to share this information, please indicate "choose not to respond." This information is included on the Tenant Certification. | Required | Text |

| Data | Description and tips | Required/Optional | Format |
|--|--|-------------------------------------|---------------|
| Head of Household cellphone | Cell number where the primary tenant wants to receive texts or other communications regarding their application. This information is included on the Tenant Certification. | Optional (required if no email) | Number |
| Head of Household email | Email where the primary tenant wants to receive texts or other communications regarding their application. This information is included on the Tenant Certification. | Optional (required if no Cellphone) | Email address |
| Head of Household preferred language | Language in which primary tenant would prefer to receive communications. Please note that all tenant-facing SHERA materials are available in Spanish, Portuguese, Vietnamese, Haitian Creole, Russian, Khmer and Chinese. This information is included on the Tenant Certification. | Required | Text |
| Head of Household Limited English Proficient | Whether the primary tenant has difficulty communicating in English. This field is optional. This information is included on the Tenant Certification. | Optional | True/False |
| Household total members | Total number of individuals residing in the household | Required | Number |
| Tenant portion of monthly rent | Tenant's share of monthly rent, for dwelling rent only. If the tenant's rent changed during the year, please enter the HIGHER amount. | Required | Number |
| Total arrears owed | The total amount of arrears owed by the household. Please note that: <ul style="list-style-type: none"> Only arrears incurred between 4/1/20 and 3/31/21 are eligible for SHERA Non-dwelling rent charges (such as late fees, parking fees or pet rent) are not eligible for SHERA | Required | Number |
| Household gross income | Household's <u>annual</u> income from their most recent income certification. Please refer to program policies and FAQs for options on determining and documenting income | Required | Number |
| Unemployed Member 90 Day Prospect | Whether the primary tenant or another member of the primary tenant's household has been unemployed for 90 days or more. This information is included on the Tenant Certification. | Optional | True/False |

| Data | Description and tips | Required/Optional | Format |
|--|--|-------------------|--------|
| Resident Portion Rental Arrears Due.... | Arrears CURRENTLY due for each month, as of the time of application. See further description below | Optional | Number |

Resident Portion Rental Arrears Due Monthly (April-March)

The application includes spaces for arrears for each individual month, from April, 2020 through March, 2021.

In each field, you should enter the amount that was accrued during that month, that is still outstanding at the time you submit the application. Please note the following:

- Only dwelling rent is eligible for SHERA relief; other charges (such as late fees, parking fees or pet rent) are not eligible.
- SHERA will only pay for rent arrearages incurred on April 1, 2020 or later. Arrearages dating from prior months are not eligible and should not be included in the application.
- The arrearage claimed for any given month must be no larger than the tenant's share of monthly rent. If you submit a claim with any month requesting a bigger amount than the dollar amount you've entered for monthly rent, it will be returned to you with a request for correction.

EXAMPLE 1

A tenant's share of monthly rent is \$450. The tenant made no payments in April, 2020 or May, 2020, but in June, the tenant submitted \$1,000 to cover past months, and a portion of the June rent. In the application you should enter:

- \$0 for April arrearages, because the tenant CURRENTLY owes nothing for April dwelling rent.
- \$0 for May arrearages, because the tenant CURRENTLY owes nothing for May dwelling rent.
- \$350 for June arrearages, because \$100 of the payment made in June went to pay for that month's rent, leaving the balance unpaid.

EXAMPLE 2

A tenant's share of monthly rent is \$450. The tenant had \$575 of arrearages from February and March 2020; and the tenant made no payments in April, 2020, and has made \$0 contribution toward the April rent ever since.

In the application you should enter \$450 for April arrears, because even though the tenant had a larger arrearage amount due as of April, SHERA can only pay for rental arrears from April, 1, 2020 or later.

EXAMPLE 3

A tenant's share of monthly rent was \$450 in April – June, 2020. In July, the tenant did an income re-certification and their share of rent was reduced to \$350.

In the application, enter \$450 as Tenant Share of Monthly Rent. Even though rent is currently lower, you should use the highest monthly rental charge during the year for this tenant.

EXAMPLE 4

A tenant's share of monthly rent is \$450, plus \$25 for parking fees. In July, 2020, the tenant paid only \$200, and has not paid any additional amounts for that month since.

In the application, enter \$250 for July arrearages. Even though the tenant owes a total of \$275 if parking fees are included, parking fees are not eligible for SHERA.

Please note that if, in any single month, you enter a larger amount of arrears than the amount you enter for tenant monthly rent, the application will be returned to you with the request that you resubmit with corrected information.