



SHERA Portal Training

May 12, 2021

Last Updated: July 7, 2021



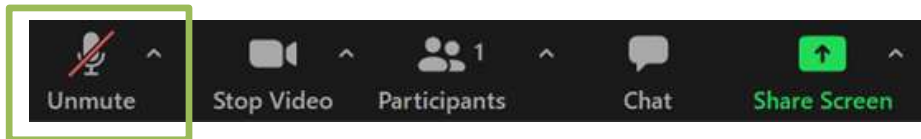
7/7/2021

ENGAGEMENT BEST PRACTICES



Please Mute

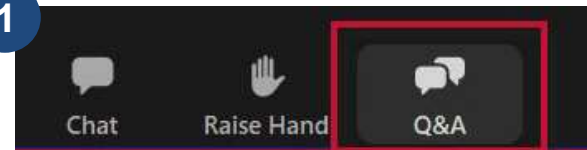
Please join the meeting muted during the session to keep interruptions to a minimum



Asking Questions

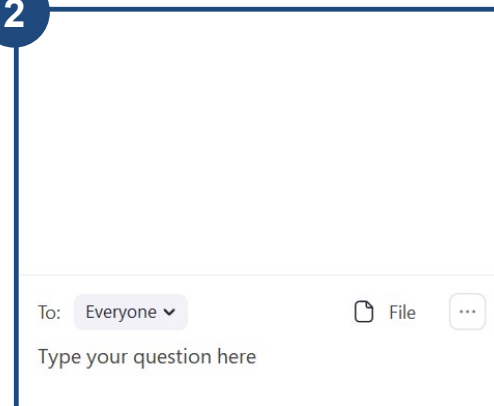
We will be monitoring the Q&A for questions

1



Click “Q&A” to open the chat window

2



Enter your question into the chat

We will follow up with answers to any questions that we don't get to during the session.

THIS CALL IS BEING RECORDED



MEET YOUR FACILITATORS



Brian Phillips

Andres Gomez

Antezia Glenn

TRAINING SUPPORT

VIVA Consulting & Accenture



Our Journey Today

60 MINUTES

- **Training Objectives Goals**
- **SHERA Overview**
- **SHERA Front-End Portal Demo**
 - **Account Creation**
 - **Need Help / Let us know Section**
 - **Program Information Page**
 - **Owner/Property Manager Home**
 - **Manage Profile**



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WELCOME TO THE SHERA PORTAL

This portal services the Subsidized Housing Emergency Rental Assistance (SHERA) Program. SHERA provides qualified owners of affordable rental housing and Local Housing Authorities with an expedited path to apply for federal Emergency Rental Assistance on behalf of income-eligible tenants.

[Login Now](#)

Only pilot owner-entities are allowed to register on or after April 8, 2021.



TRAINING OBJECTIVE



Purpose



Demonstrate step by step instructions for using the **Online SHERA Portal** to register your property and apply for SHERA's emergency rental arrearage assistance.

Goal



Provide guidance to better support owners/property managers/staff who are eligible for SHERA and preparing to apply.



SHERA Overview

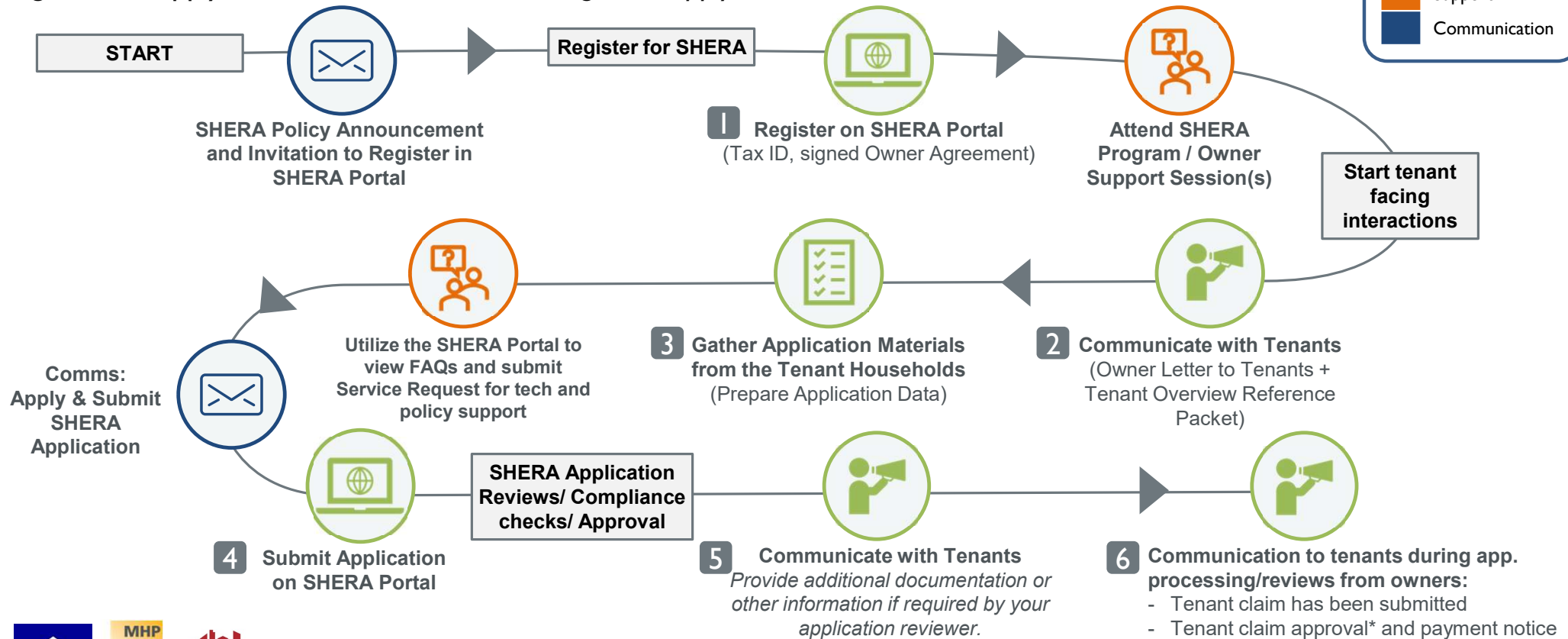


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SHERA OWNER JOURNEY



Owners can generally expect to follow this journey if they're participating in SHERA once they're eligible to register and apply. **Note:** not all owners will be eligible to apply at this time.



*Tenant claim denials will be communicated to owners and tenants by DHCD



SHERA Portal Demo



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RESOURCES & NEXT STEPS



5/5/2021



SHERA Program Overview Session

- This session reviewed the Subsidized Housing Emergency Rental Assistance (SHERA) Program and Policy.



SHERA Application Readiness Session

- This session reviewed the detailed steps to prepare materials for a SHERA application.



SHERA Technical Session(s) Portal Demo

- The technical session(s) walked through how to use and navigate the SHERA portal where applications will be uploaded.

NEXT STEPS



- 1 **WATCH OUT FOR** the SHERA Registration Invitation Email and develop your plan to engage with tenants.
- 2 **REVIEW** the [SHERA application data fields instructions](#)
 - An [application template](#) is included on the SHERA website. This includes the information owners need to collect for tenants with rent arrearages to ensure a complete application. You may already have some of this data in your tenant management system.
 - Note: you will receive a notification when you are able to register and submit applications
- 3 **SEND/SHARE** the [Owner Letter to Tenants](#) (*updated*) and the [Tenant Certification](#). (*updated*)
 - The Owner Letter to Tenants is to inform residents about the program and the Tenant Certification is to verify eligibility and start collecting tenant permissions for the Owner to apply on their behalf. *These documents are available in 7 languages.*



RESOURCES



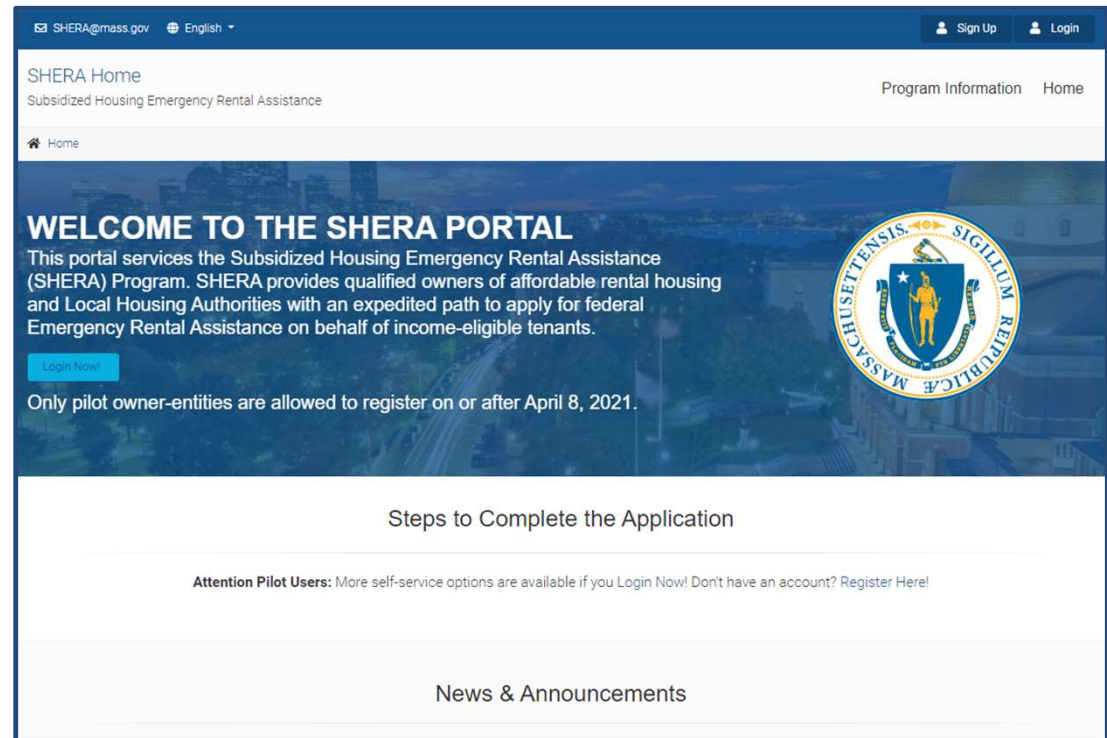
RESOURCES

- Review materials on the SHERA Portal Program Information tab <https://sherafunding.mass.gov/>
 - SHERA Policy Guidance
 - SHERA Owner FAQs
 - SHERA Notification to Tenant Instructions and Form Letters



SUPPORT & QUESTIONS

- After reviewing the materials, if you have questions related to SHERA, please [submit a support ticket](#) on the Portal.





QUESTIONS



5/5/2021



THANK YOU!



5/5/2021

ACCOUNT CREATION



[SHERA@mass.gov](#) [English](#) [Sign Up](#) [Login](#)

SHERA Home

Subsidized Housing Emergency Rental Assistance

[Program Information](#) [Home](#)

[Home](#) » [Auth](#) » [Register](#)

WELCOME TO THE SHERA PORTAL

This portal services the Subsidized Housing Emergency Rental Assistance (SHERA) and its affiliated programs.

- Secure Access**
- Complete Online Transactions**
- Upload Documents**
- Stay Informed**

New Owner/Property Manager Account

What type of user are you?

☐ Owner

☐ Property Manager

First Name

Last Name

Email

Password

Confirm Password

The Tax ID or TIN of any of your projects

☐ I agree to the Terms and Privacy Policy

[Register Account](#)

Already Registered? Login Now!



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ACCOUNT CREATION



SHERA Home

Subsidized Housing Emergency Rental Assistance

[Program Information](#) [Home](#)

[Home](#) » [Auth](#) » Send Confirmation Email

✓ The account was successfully created.



Confirm your Email Address.

[Please check your email and confirm your email address.](#)

If you are not receiving the email, please check your **SPAM or JUNK Folder** to be sure that our emails are not being detected as spam. If you find a message wrongly classified as spam, you can unmark the message. Just select the message, and click the Not Spam button that appears at the options of your current view. Unmarking a message will automatically move it to your inbox.

If you need us to resend the confirmation email, please click the button below.

 [Resend Confirmation Email](#)



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ACCOUNT CREATION



Subsidized Housing Emergency Rental Assistance (SHERA)

Subsidized Housing Emergency Rental Assistance

Step 1 of 2

Setup your account with two-factor authentication.

Please enter a mobile phone you would like to use for SMS verification. **This setup is required.**

Phone Number

Send code via SMS

How does two-factor authentication help me?

Two-factor authentication (2FA) adds an extra layer of security to your account. After you enter your username and password to login, you will be prompted to enter a verification code sent to your device. If you are using your personal computer or device, you can select an option to remember the device. In some instances you may be prompted to re-enter a code, like when you're logging in from an unrecognized device.



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NEED HELP / LET US KNOW SECTION

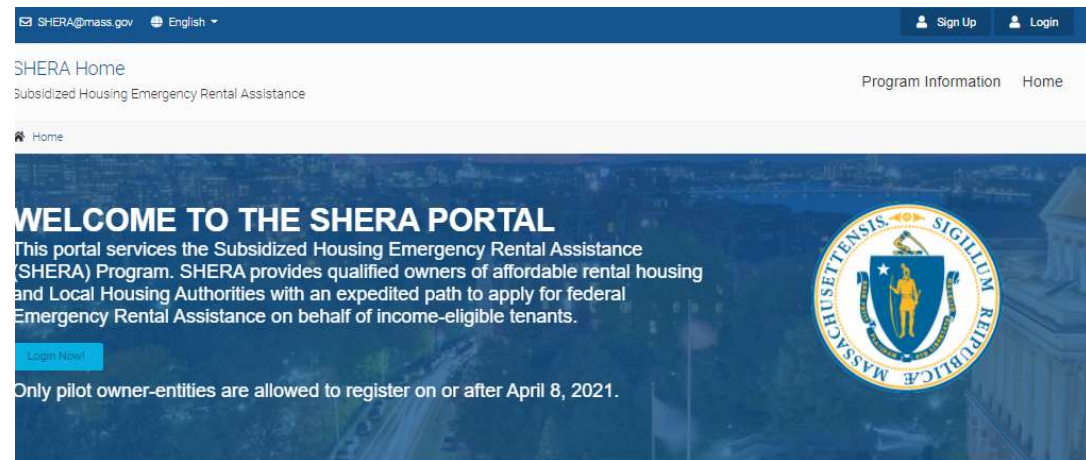


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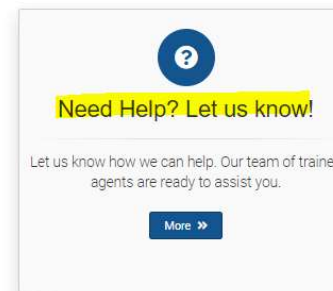
NEED HELP / LET US KNOW SECTION



- Creates ticket which is automatically routed to certain parties based on the criteria that you fill out.



Steps to Complete the Application



Attention Pilot Users: More self-service options are available if you Login Now! Don't have an account? Register Here!



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NEED HELP / LET US KNOW SECTION



Service Request

Please make sure to include your Project ID if you have already registered or tried to register on the SHERA Portal.

Contact Information

Name *

First

Last

Email *

Mobile Phone *

Development Name

Please select option *

☐ Owner ☐ Property Manager ☐ Other

What can we help you with? *

Select (Drop Down)



Please let us know how we can help you. *

Submit



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PROGRAM INFORMATION PAGE



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PROGRAM INFORMATION PAGE



- Top Right Corner of Main Page and subsequent pages
- This page is a resource for all the latest documents which an owner or property manager may need when they're working with the SHERA program

SHERA@mass.gov [English](#) [Sign Up](#) [Login](#)

[SHERA Home](#)
Subsidized Housing Emergency Rental Assistance

[Program Information](#) [Home](#)

[Home](#) » [View](#) » [program information](#)

PROGRAM INFORMATION

- [→ SHERA Program & Policy Information](#)
- [→ Application Materials](#)
- [→ SHERA Tenant Communications](#)
- [→ SHERA Webinar / Training Materials](#)

NEED HELP?

You can contact our Client Call Center at or by email to SHERA@mass.gov.



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OWNER/PROPERTY MANAGER HOME



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OWNER/PROPERTY MANAGER HOME



- Located on the top Right Corner of Main Page

The screenshot shows the SHERA Home page. At the top, there is a navigation bar with the email SHERA@mass.gov, a language dropdown set to English, and a welcome message "Welcome AA BB". Below this, the page title is "SHERA Home" with the subtitle "Subsidized Housing Emergency Rental Assistance". On the right, there are links for "Program Information" and "Home". A yellow button labeled "Owner Section" is visible. The main content area features a large blue banner with the text "WELCOME TO THE SHERA PORTAL" and a description of the program. To the right of the text is the Seal of the Commonwealth of Massachusetts. Below the banner, there is a section titled "Steps to Complete the Application" with a link for "Attention Pilot Users". Further down, there is a "News & Announcements" section which currently shows "There are no entries at this time." At the bottom, a blue box contains the heading "NEED HELP?" and contact information for the Client Call Center and the email SHERA@mass.gov.

SHERA Home
Subsidized Housing Emergency Rental Assistance

Program Information Home

Home Owner Section

WELCOME TO THE SHERA PORTAL

This portal services the Subsidized Housing Emergency Rental Assistance (SHERA) Program. SHERA provides qualified owners of affordable rental housing and Local Housing Authorities with an expedited path to apply for federal Emergency Rental Assistance on behalf of income-eligible tenants.

Only pilot owner-entities are allowed to register on or after April 8, 2021.

Steps to Complete the Application

Attention Pilot Users: More self-service options are available if you Login Now! Don't have an account? [Register Here!](#)

News & Announcements

There are no entries at this time.

NEED HELP?

You can contact our Client Call Center at or by email to SHERA@mass.gov.



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OWNER/PROPERTY MANAGER HOME



From the Homepage you can access:

- Manage Profile
- Import Units / Tenants
- Add Project / Property

SHERA@mass.govEnglish

Welcome AA BB

SHERA Home

Subsidized Housing Emergency Rental Assistance

Program Information

Home

HomeOwners

Owner Section

User Main Information

AA BB

Property Manager

Email: [REDACTED]@gmail.com

Total Projects/Properties: 0

Total Submitted Applications: 0

Payments Overview

Requested

0 payment - \$0.000

Approved

0 payment - \$0.000

Under Review

0 payment - \$0.000

Pending

0 payment - \$0.000

Denied

0 payment - \$0.000

AVAILABLE ACTIONS

Owner Home

Manage Profile

Import Units/Tenants

Your Projects

Add Project/Property

Search...

Project ID

Development Name

Borrower Name

TIN

Units

No data available in table

<>

10Showing 0 to 0 of 0 entries



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MANAGE PROFILE



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MANAGE PROFILE



SHERA PORTAL - UNDER DEVELOPMENT

[SHERA@mass.gov](#) [English](#)

Welcome AA BB

SHERA Home

Subsidized Housing Emergency Rental Assistance

[Program Information](#) [Home](#)

[Home](#) » [Auth](#) » [Manage](#)

[Owner Section](#)

Manage Profile

Website Account

Username / Email: [REDACTED]@gmail.com

Password: [REDACTED]

Phone Number: [REDACTED]

Two-Factor Authentication: [?](#) Enabled

[Change Password](#)
[Change Phone Number](#)

Personal Information

Full Name: AA BB

NEED HELP?

You can contact our Client Call Center at or by email to SHERA@mass.gov.



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ADD PROJECT / PROPERTY



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ADD PROJECT / PROPERTY



Add Project

Instructions: Please enter the following information. You can also upload all your properties, along with the tenants' information [HERE!](#)

Property or Project ID

Tax ID or TIN

Format: 555-55-5555 OR 55-5555555

Cancel

Add Project

IMPORTANT: Your Property/Project ID number will be sent to you with your invitation to participate in the program. You will need this number in order to register your property.



IMPORT UNIT / TENANTS



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IMPORT UNIT / TENANTS / Excel File Template

- The Excel template to upload tenant data can be downloaded from the main Import Data screen.
- You can design a report from your property management software, and import that report directly. The portal will accept .xls, .xlsx or .csv files.
 - Import is easiest if you match the data field names exactly
- File can be selected from folder section or can be dragged and dropped on the upload area.
- Upload successful message will appear and count of tenant records uploaded.

SHERA Home
Subsidized Housing Emergency Rental Assistance

Program Information Home

Home Owners Import Data Owner Section

Import Data into the Owner Portal

Follow these steps to upload your tenants information. For this process, you can use your own template or excel file. You can also use [this Excel File Template](#) for your convenience.

Mapping File

Well Information

Take the following

Drag-n-Drop files to upload.

Or

Select file

Cancel

1. UPLOAD FROM YOUR COMPUTER A .CSV, .XLS OR .XLSX (SPREAD SHEET) DOCUMENT.

START MAPPING




Excel
Template

IMPORT UNIT / TENANTS / Auto Matching Fields

- After initial upload, each column can be matched with the NMA Portal Fields.
- If the Excel Template was used, or if the data field names exactly match the field names in the Template, Auto Match can be used.
- The Red Fields are always mandatory.

MAPPING FILE

Instructions: Map the fields from your file to the fields in the NMA Portal. Just drag and drop each one of the corresponding fields, OR for your convenience, if the fields names match, just click Auto-Match. If a NMA Portal Field is highlighted in **RED**, it is a required field.

Clear  Auto-match  Continue 

Fields found on your file	NMA Portal Fields
Project_ID	Project_ID
Unit_Number	Unit_Number
Street_Address	Street_Address
City	City
State	State
Zip	Zip
Head_of_Household_First_Name	Head_of_Household_First_Name
Head_of_Household_Last_Name	Head_of_Household_Last_Name
Head_of_Household_Initial	Head_of_Household_Initial
Head_of_Household_DOB	Head_of_Household_DOB
Head_of_Household_Last_4_SSN	Head_of_Household_Last_4_SSN
Head_of_Household_Gender	Head_of_Household_Gender
Head_of_Household_Race	Head_of_Household_Race
Head_of_Household_Ethnicity	Head_of_Household_Ethnicity
Head_of_Household_Cellphone	Head_of_Household_Cellphone



IMPORT UNIT / TENANTS / Validate Records and Fix Errors

- All data can be verified before final upload.
- Any row that does not have information or has incorrect information will be highlighted yellow.
- Until all invalid rows are fixed, you cannot proceed with the upload.

AUTOMAPPER

Verify the information and make sure there are no errors. Yellow rows indicate that the information provided is wrong or missing. Please navigate through the data and fix any errors. Once the errors are resolved you may continue.

Invalid Records (0) Valid Records (4) Total Records (4)

Valid Row/Field Invalid Row Invalid Field

Invalid Total	Tenant Portion of Monthly rent	Total Arrears Owed	Household Gross Income	Unemployed Member 90 Day Prospect	Amount Due April 2020	Amount Due May 2020	Amount Due June 2020	Amount Due July 2020	Amount Due August 2020
	500	1500	15000	None	100	200	300	100	200
	600	3000	12500	None	200	300	200	200	300
	800	4000	10500	None	300	100	100	300	100
	500	1500	15000	None	100	200	300	100	200

Finish Cancel

IMPORT UNIT / TENANTS / Confirmation and Import



- All checkboxes must be checked before proceeding
- This is the final page that will confirm and upload the information to the system.

AUTOMAPPER

DOCUMENT CONFIRMATION
INFORMATION MANAGEMENT SYSTEM

4 RECORDS WILL BE IMPORTED TO THE SYSTEM

! IMPORTANT

By submitting this application, you are affirming that:

- All of the information is accurate to the best of your knowledge
- You have secured tenant affirmations and permissions as required
- You can provide the required backup documentation upon request
- You will apply all assistance received to discharge tenant arrearages
- You will continue to abide by all of the other commitments in the Owner Contract.

☐ I certify that I have read and understood the commitments in the Owner Contract, and that I will adhere to all required conditions.

☐ I certify that all of the information submitted is true, correct, and validated to the best of my abilities.

☐ I certify that all of the tenants on whose behalf I am submitting this application have authorized me to do so, and that they have provided written attestation to the accuracy of the information they have provided.

☐ I certify that I am authorized to submit this application on behalf of the owner/agent.

SEND

Cancel



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VIEW PROJECT DETAILS



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VIEW PROJECT DETAILS



From the View Project Details you can access:

- Specific Project Information
- Import Units/Tenants
- Update your W-9
- Request Direct Deposit
- Sign Owner Agreement
- View Tenant Details

SHERA@mass.gov English Welcome AA BB

SHERA Home Subsidized Housing Emergency Rental Assistance Program Information Home

Home Owners Property Details Owner Section

Project Information

Project ID: 16-600 **W-9 Pending**

Development Name: 115 RODEO DR **Direct Deposit Pending**

Borrower Name: 103 ACADEMY PARTNERSHIP LLC

TIN: **_*****

Owner: SUNSET MANAGEMENT

Management Company: JJ RESIDENTIAL

Total Units: 170

[← Back to Owner Home](#)

AVAILABLE ACTIONS

- [Owner Home](#)
- [Import Units/Tenants](#)
- [Update your W-9](#)
- [Request Direct Deposit](#)

Tenants

Search...

App ID	Name	Address	Total Amount	
T122457530	AN WSD	123 ABC Street Boston, MA 02125	\$103604	View Tenant Details



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VIEW PROJECT DETAILS / Update your W-9



- Submit a New W-9 form.
- Update an existing W-9 form by providing Social Security Number (SSN), the Employer Identification Number (EIN) or Confirmation Number.

SHERA Home
Subsidized Housing Emergency Rental Assistance

Program Information Home

Home W9 Step 1 Owner Section

IRS W-9 FORM

To serve you better, please enter the information below to validate your record with us.

Type of Submission Main Information Validate Confirm Finish

Type of Submission

Step 1 of 5

Are you submitting a new W-9 application or modifying an existing one? (of the person or business)

☐ New W-9 Form

☐ Update an Existing W-9 Form

Enter the Client ID or Application Number of the Tenant (optional)

☐ Release of Information Acceptance:

By proceeding with this request, you are authorizing SHERA and its agents to verify the information you provide with the Internal Revenue Service (IRS) and/or other third-party systems for identity verification and fraud avoidance.

Next >>

VIEW PROJECT DETAILS / Update your W-9



- Confirmation is completed after validation of data through a text code validation.

IRS W-9 FORM

To serve you better, please enter the information below to validate your record with us.



Accept, Sign and Validate

Step 3 of 5

☐ Under penalties of perjury, I certify that:

1. The Social Security Number or the Taxpayer Identification Number (TIN) entered in the previous step is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.
4. My name in the field below will serve as signature for this online submission.
5. I have read and accept the Terms and Conditions.

Full Name (this will serve as your signature)

Validate with your Mobile Phone or Email ?

* Additional data and sms fees may apply.

<< Back

Next >>



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VIEW PROJECT DETAILS / Update your W-9



IRS W-9 FORM

To serve you better, please enter the information below to validate your record with us.



All Done!

Step 5 of 5



Thank you! The information was successfully validated and received.

Your confirmation number is E7███4.

Start Over 

VIEW PROJECT DETAILS / Request Direct Deposit



DIRECT DEPOSIT ENROLLMENT REQUEST FORM

To serve you better, please enter the information below to validate your record with us.



Type of Submission Step 1 of 5

Are you submitting a new W-9 application or modifying an existing one? (of the person or business)

☐ New Request for Direct Deposit

☐ Change Current Direct Deposit Information

Enter the Application Number of the Tenant

☐ **Information Release Acceptance:**

By proceeding with this request, you are authorizing SHERA and its agents to verify the information you provide with third-party systems for identity verification and fraud avoidance.

[Next >>](#)

VIEW PROJECT DETAILS / Sign Owner Agreement



SHERA Home

Subsidized Housing Emergency Rental Assistance

Program Information Home

Home » View » owner agreement test

Owner Section

Owner Agreement - TEST

INSTRUCTIONS FOR SIGNING DOCUMENTS ONLINE

USING YOUR MOBILE NUMBER TO AUTHENTICATE.

After entering a valid phone number, we will send you a 4-digit verification PIN via sms for you to enter on the following page.

Country Code:

1

Phone Number:

3051112222

Sms Me

- 1) **COUNTRY CODE.** The Country Code is always 1.
- 2) **MOBILE NUMBER.** Enter your mobile number without dashes.

Click below to sign this document.

Sign Document



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VIEW PROJECT DETAILS / View Tenant Details



Tenant Information

Tenant Information

Client ID

T122457530

Full Name

AN WSD

DOB

3/14/1992

Last 4 SSN

Project ID

16-600

Project Name

115 RODEO DR

Unit Number

1

Address

123 ABC Street
Boston, MA 02125

Payment Information

Period	Amount	Status	Requested	Last Update
April 2020	\$12,345.00	Pending	04/07/2021	04/07/2021
May 2020	\$12,345.00	Pending	04/07/2021	04/07/2021
June 2020	\$12,345.00	Pending	04/07/2021	04/07/2021
July 2020	\$12,345.00	Pending	04/07/2021	04/07/2021
August 2020	\$1,600.00	Pending	04/12/2021	04/12/2021
September 2020	\$1,700.00	Pending	04/12/2021	04/12/2021
October 2020	\$12,345.00	Pending	04/07/2021	04/07/2021
November 2020	\$1,900.00	Pending	04/12/2021	04/12/2021
December 2020	\$2,000.00	Pending	04/12/2021	04/12/2021
January 2021	\$1,234.00	Pending	04/07/2021	04/07/2021
February 2021	\$33,444.00	Pending	04/07/2021	04/07/2021
March 2021	\$1.00	Pending	04/07/2021	04/07/2021

Close



7/7/2021