SHERA Portal Training

May 25, 2021

Last Updated: July 7, 2021

ENGAGEMENT BEST PRACTICES

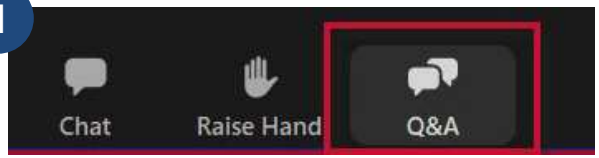
Please Mute

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

Asking Questions

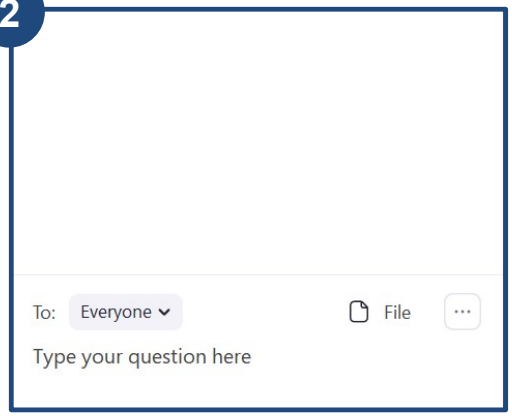
We will be monitoring the Q&A for questions

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

Chris Devore	**Andres Gomez**	**Brian Phillips**	**Antezia Glenn**

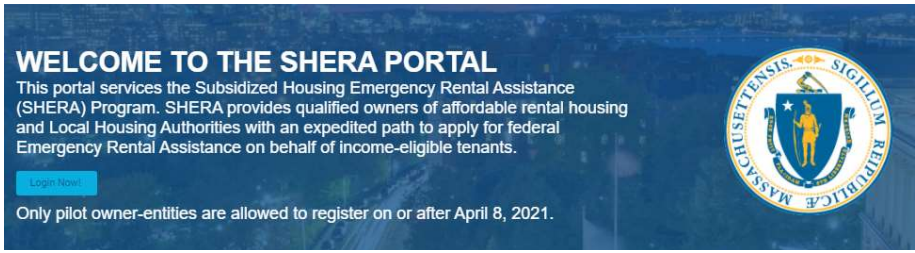
TRAINING SUPPORT

Cybersense & 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**



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.

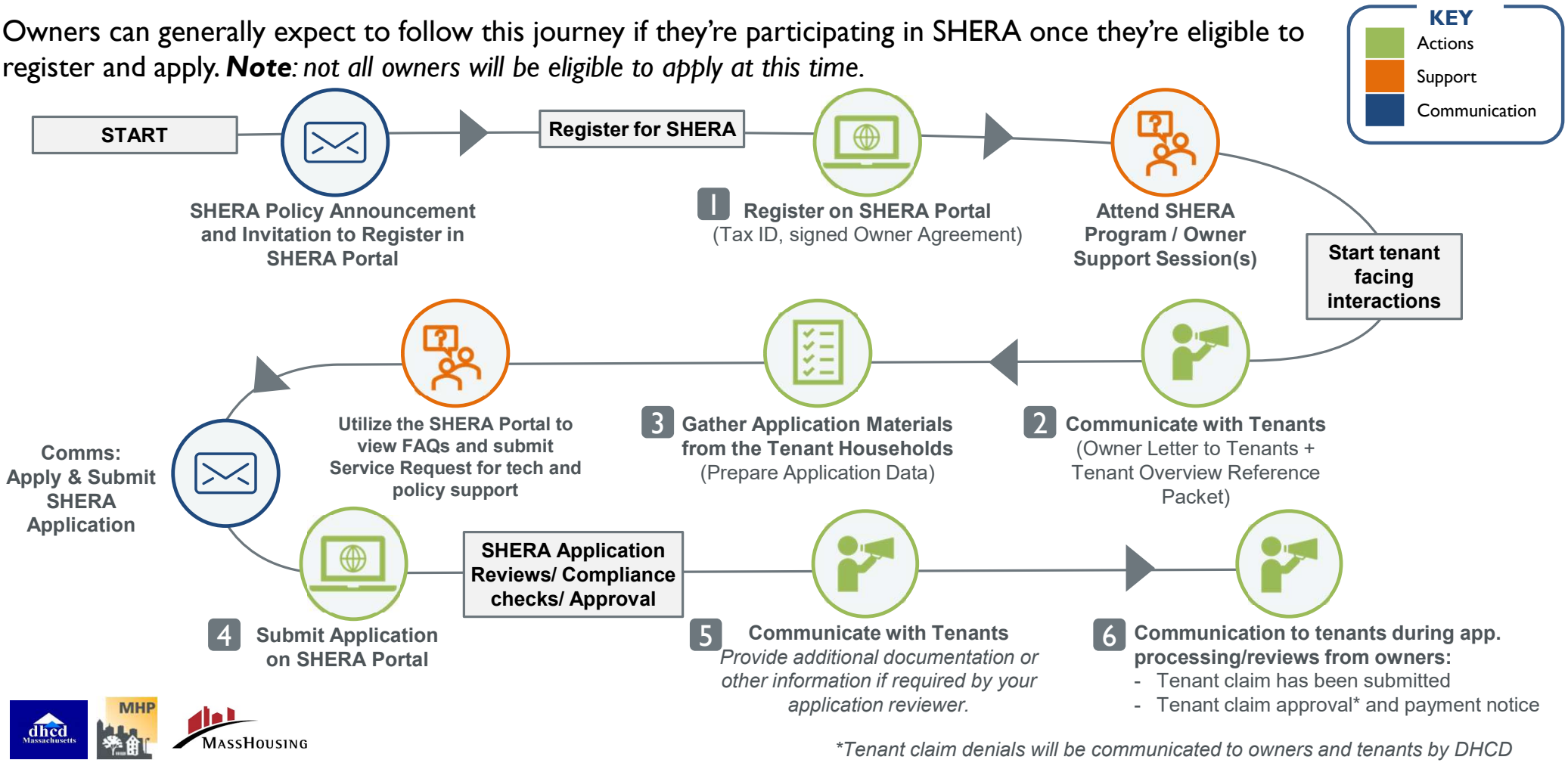
Goal

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

SHERA Overview

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

RESOURCES & NEXT STEPS

SHERA Trainings

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

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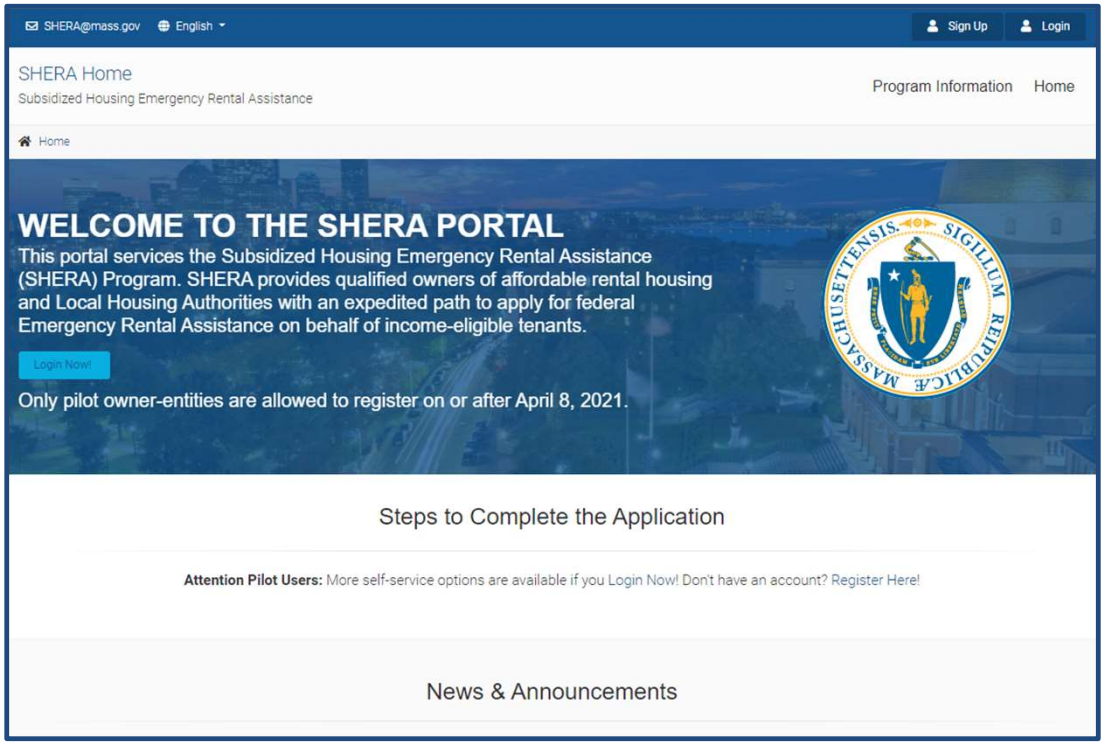
- Review materials on the SHERA Portal Program Information tab https://sherafunding.mass.gov/
  - SHERA Policy Guidance
  - SHERA Owner FAQs
  - SHERA Notification to Tenant Instructions and Form Letters

SUPPORT & QUESTIONS

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



Cybersense Support

- Cybersense will be providing "office hour-style" support to LHAs on registering, preparing and submitting claims, and responding to requests for additional information
  - Sign up by Google Sheets to be provided by Cybersense.

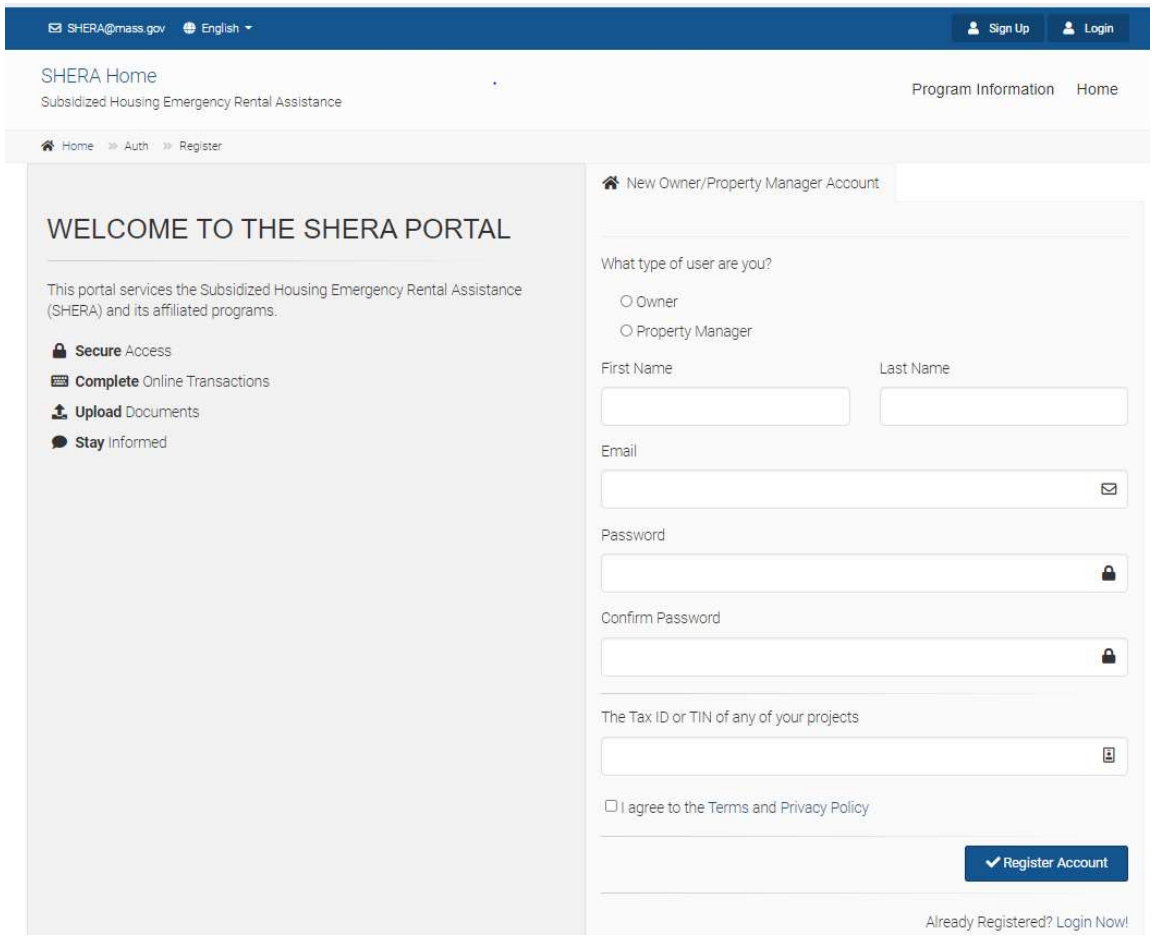
- They will also provide a webinar training on how to prepare for applications, including:
  - Extracting tenant info from management systems
  - Converting files to csv for upload
  - Mail merge for tenant communications
  - General tech support on Podio system

- Cybersense will notify LHAs of webinar trainings

QUESTIONS

THANK YOU!

ACCOUNT CREATION



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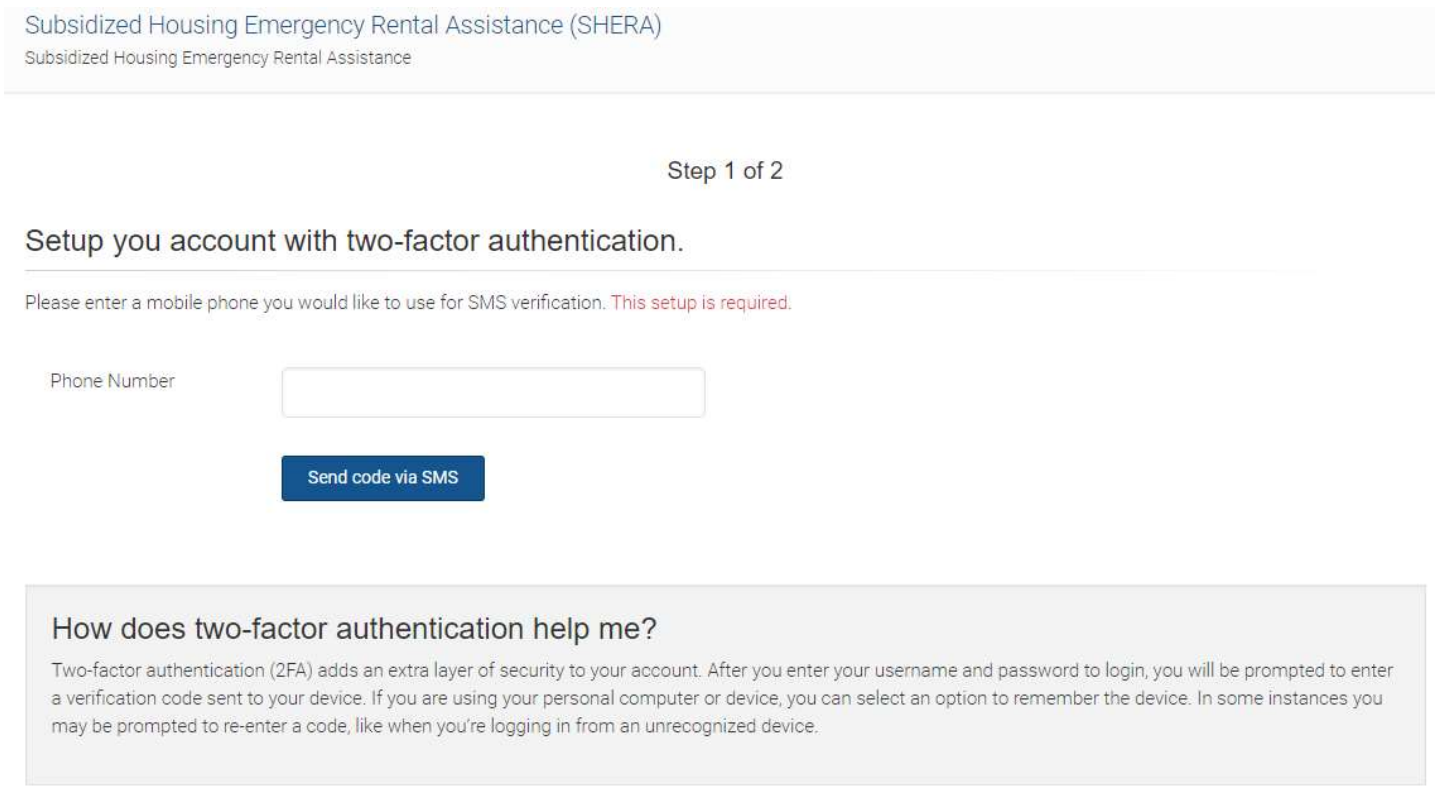
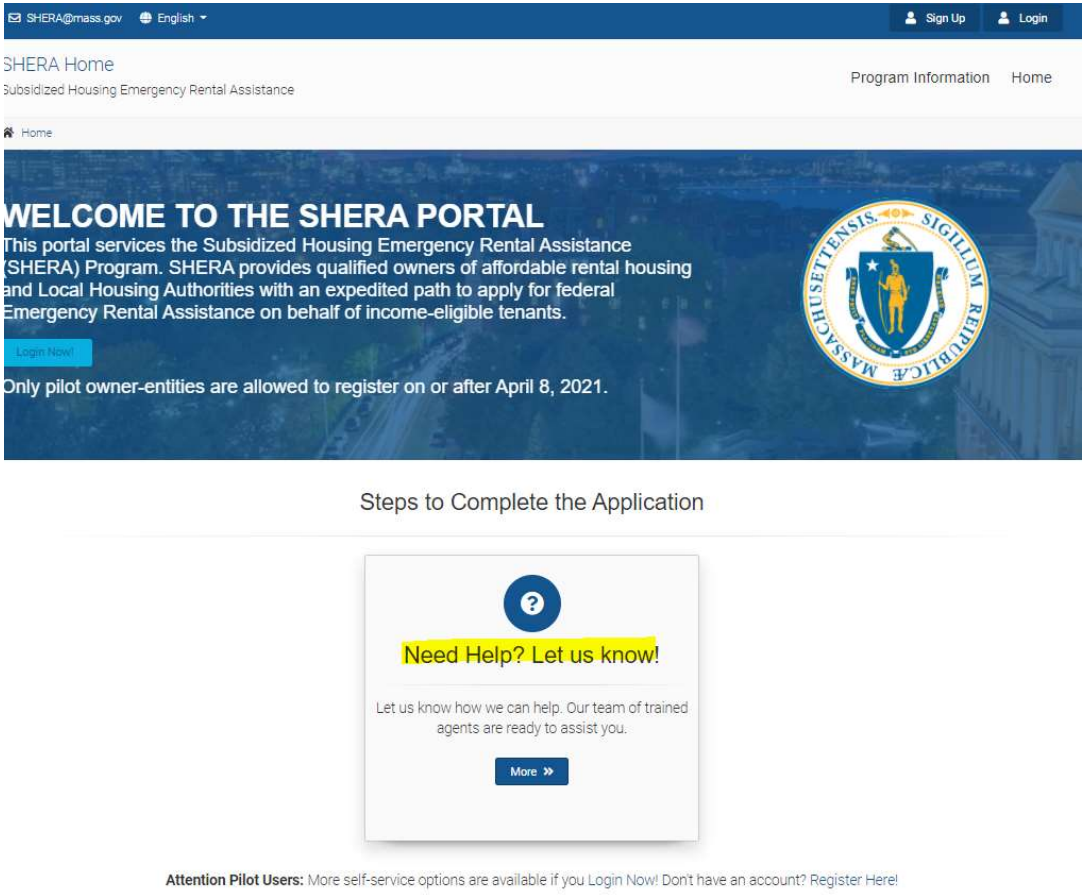


NEED HELP / LET US KNOW SECTION

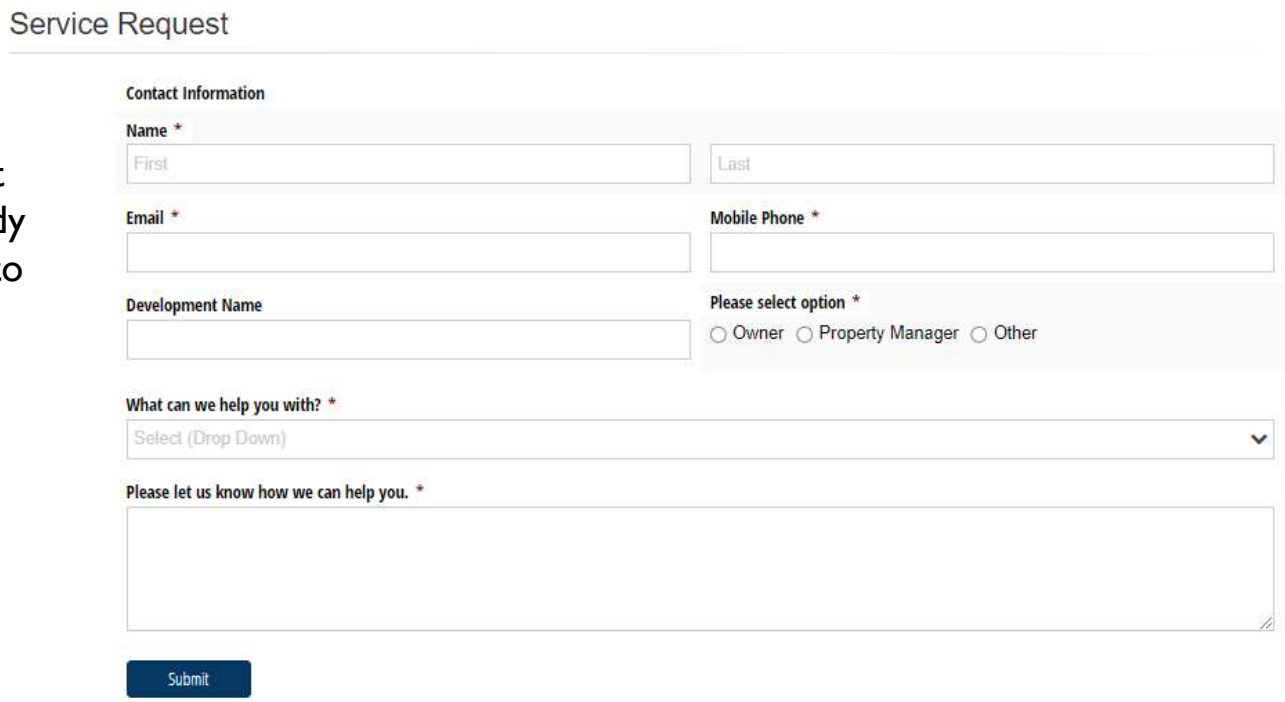
NEED HELP / LET US KNOW SECTION

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



NEED HELP / LET US KNOW SECTION

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



PROGRAM INFORMATION PAGE

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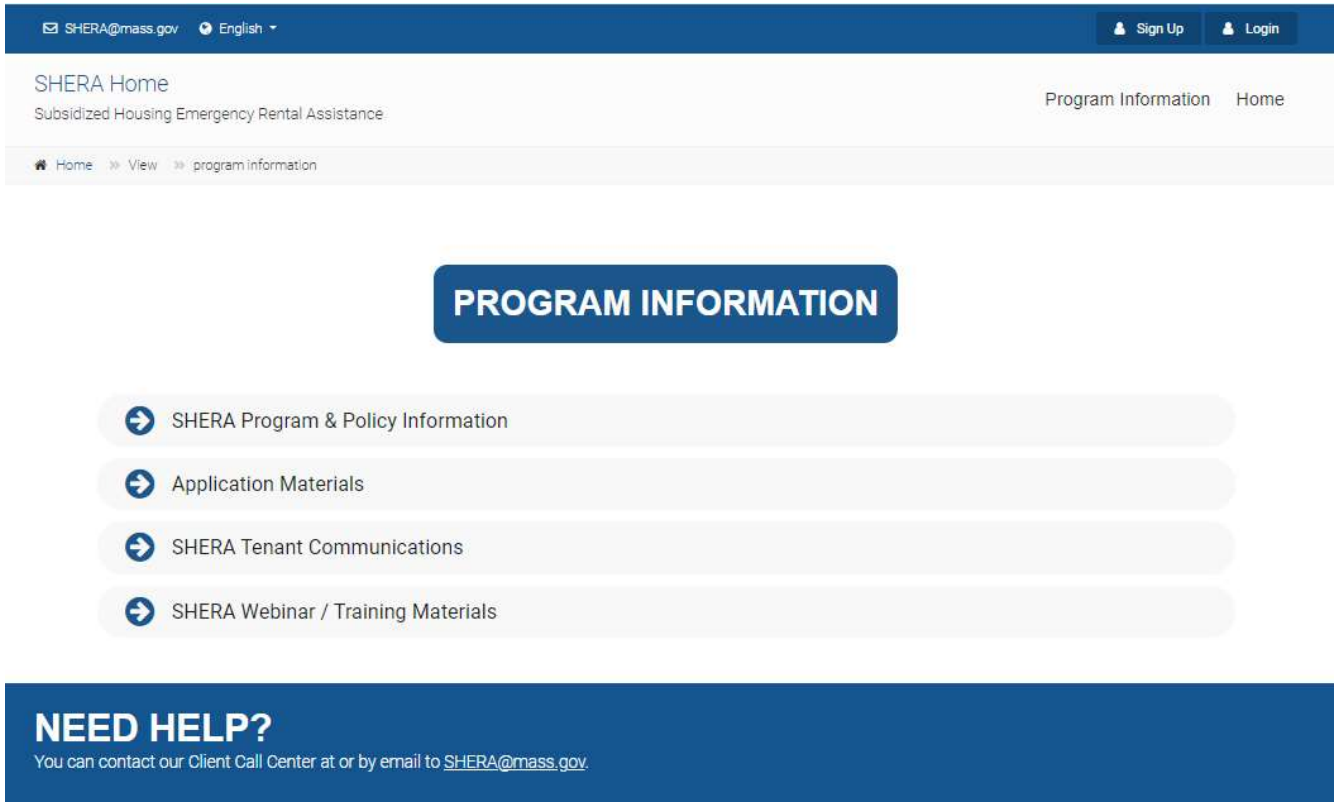
- Top Right Corner of Main Page and subsequent pages
- This page is a resource for all the latest documents which an owner or property manager may need when they're working with the SHERA program



OWNER/PROPERTY MANAGER HOME

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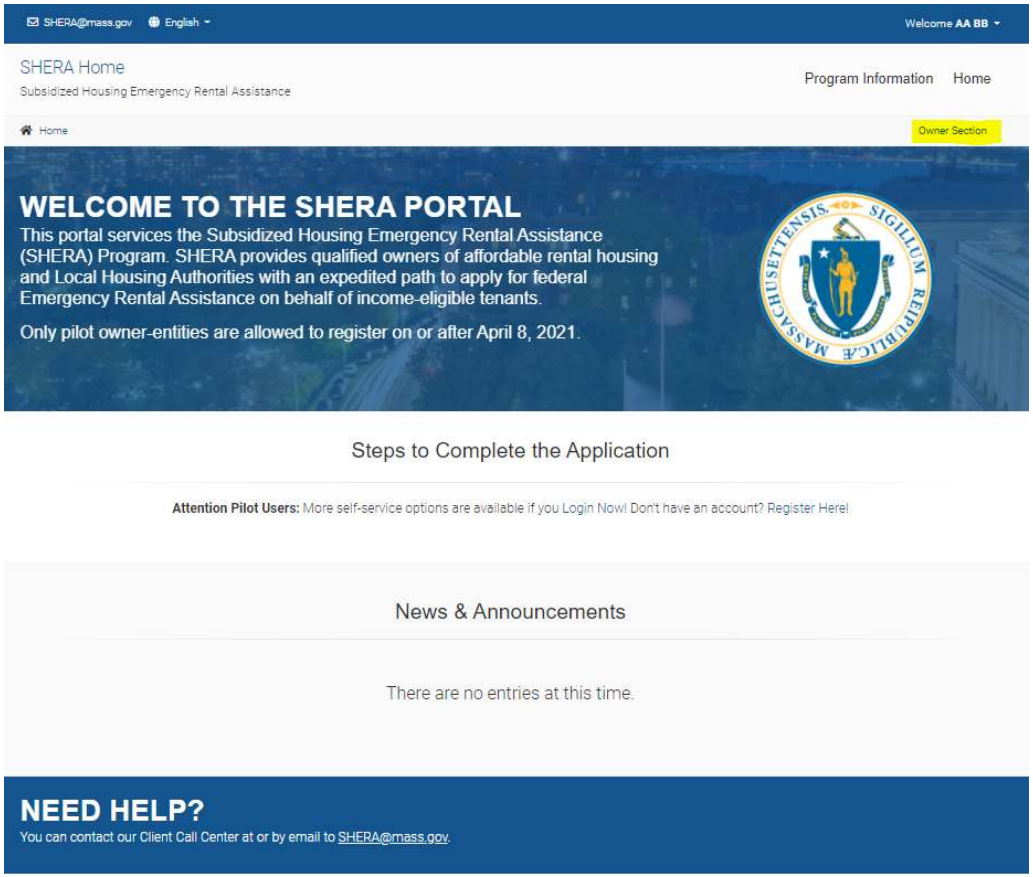
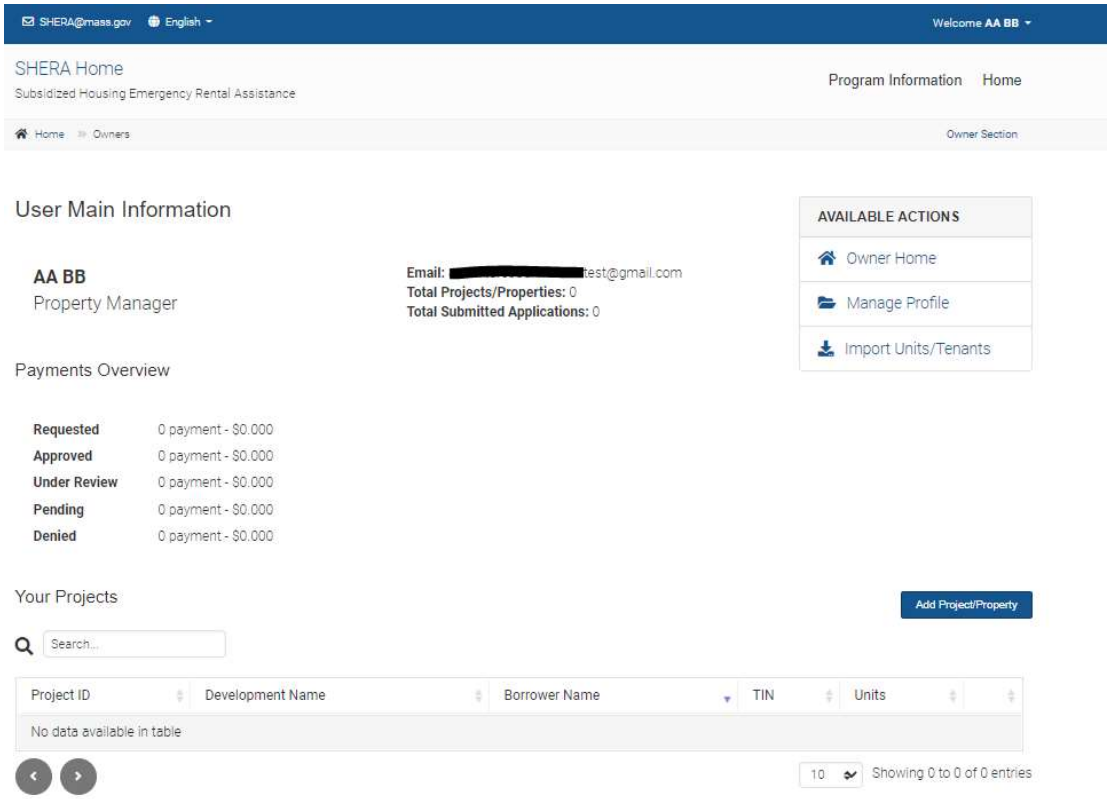
- Located on the top Right Corner of Main Page



OWNER/PROPERTY MANAGER HOME

From the Homepage you can access:

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



MANAGE PROFILE

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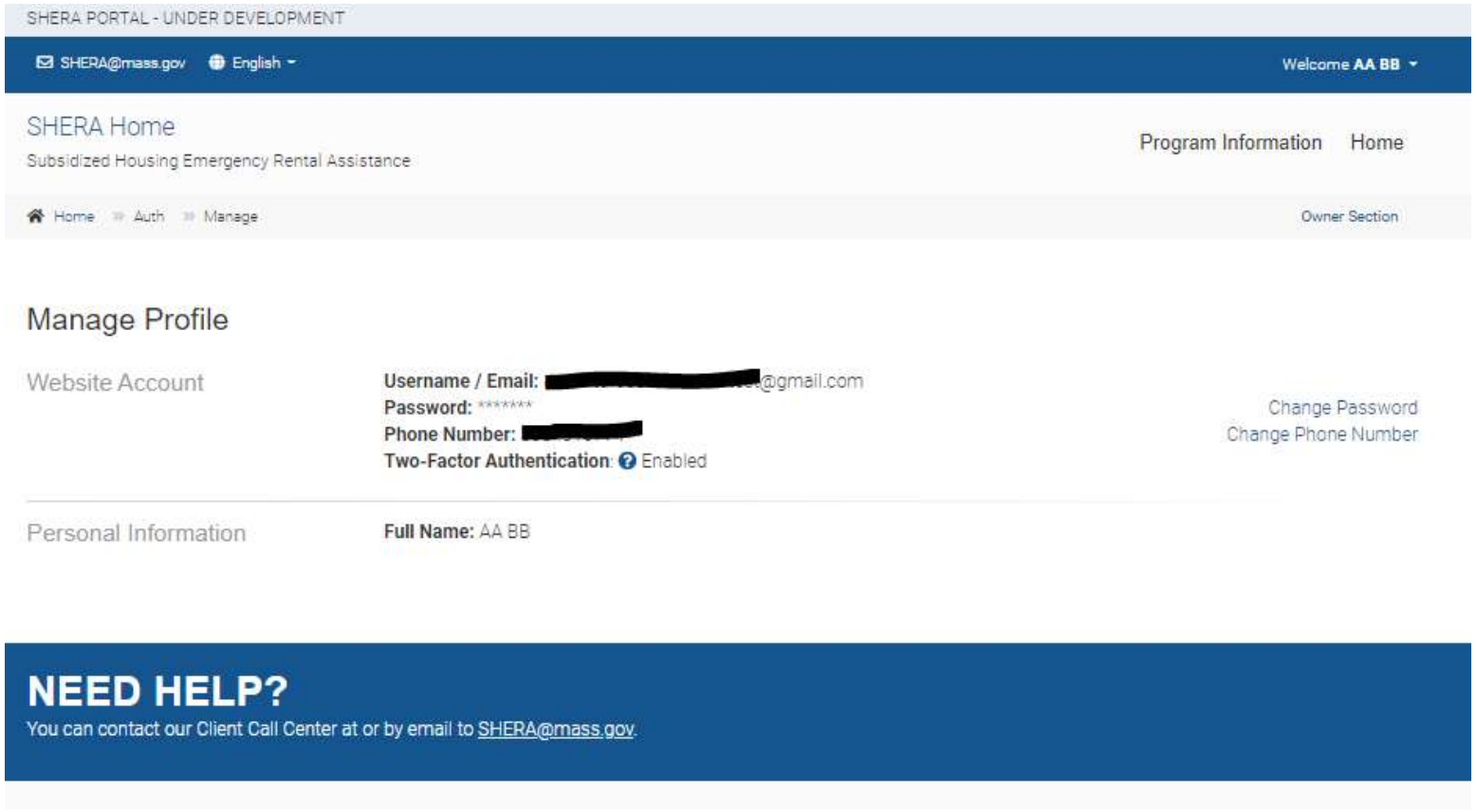

ADD PROJECT / PROPERTY

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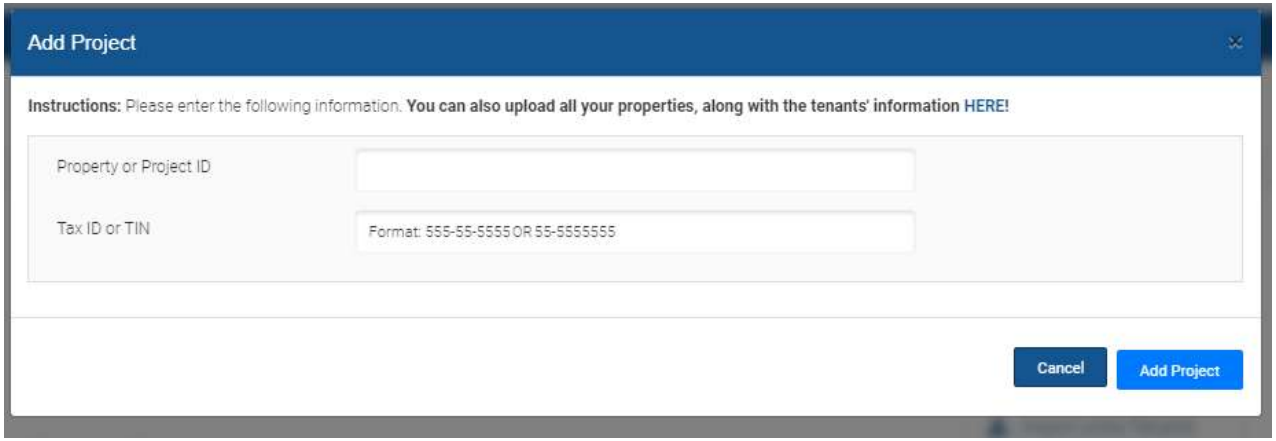
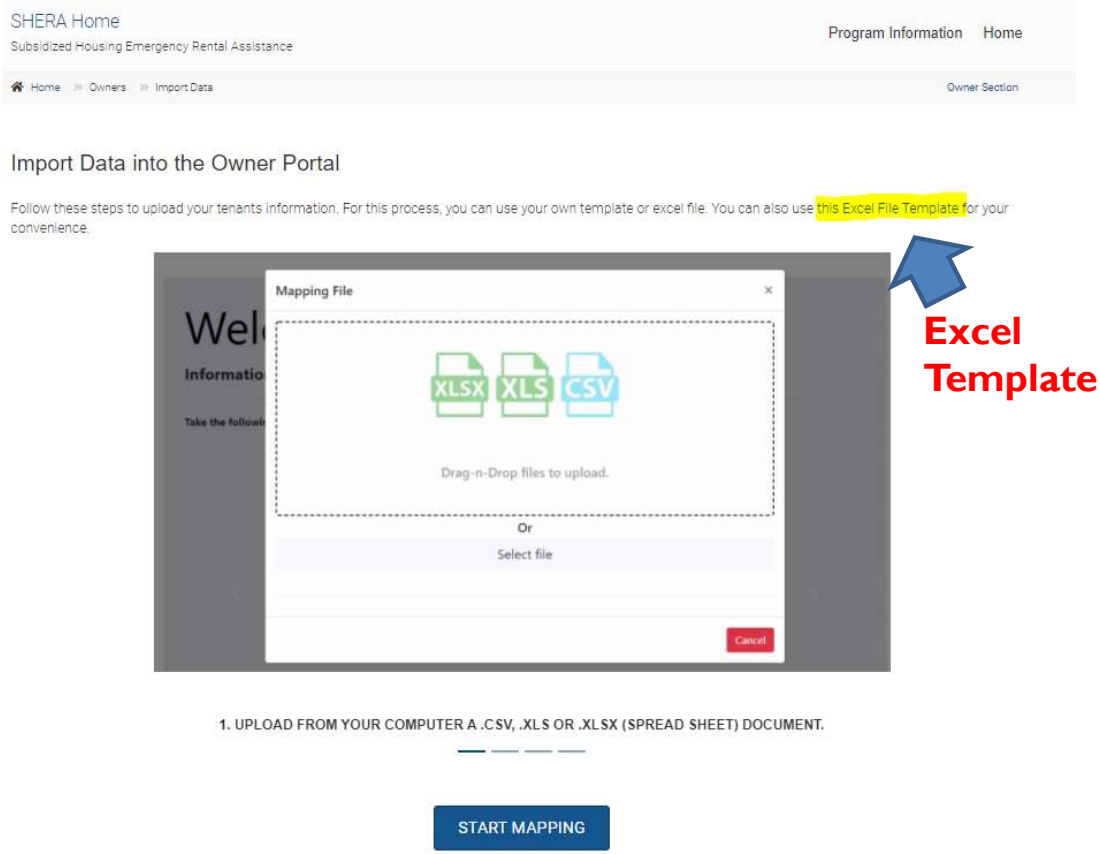


IMPORTANT: Your Property/Project ID number will be sent to you with your invitation to participate in the program. You will need this number in order to register your property.

IMPORT UNIT / TENANTS

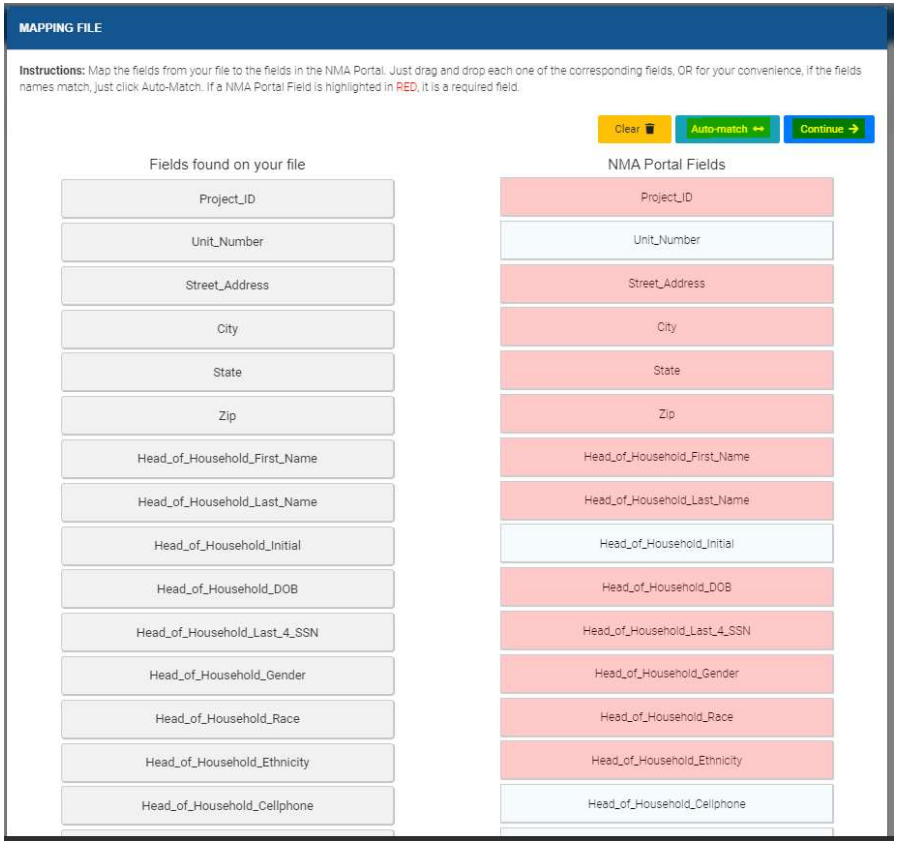
IMPORT UNIT / TENANTS / Excel File Template

- 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.



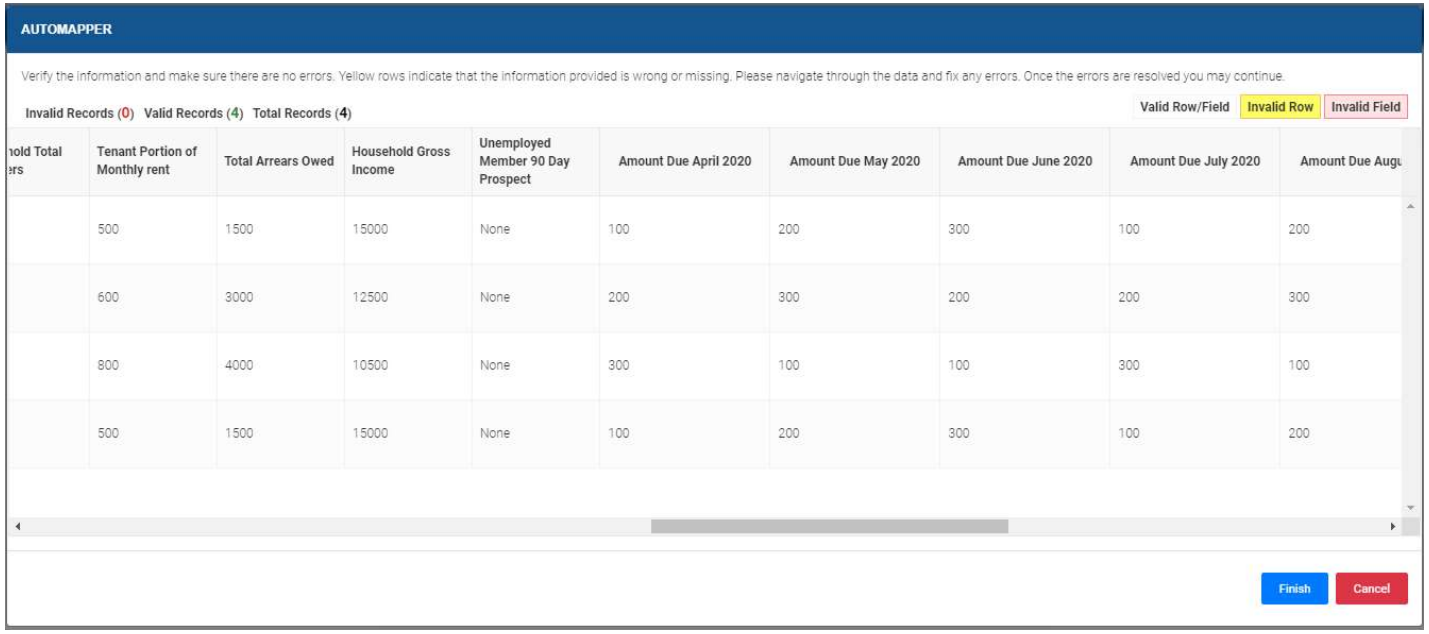
IMPORT UNIT / TENANTS / Auto Matching Fields

- 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.



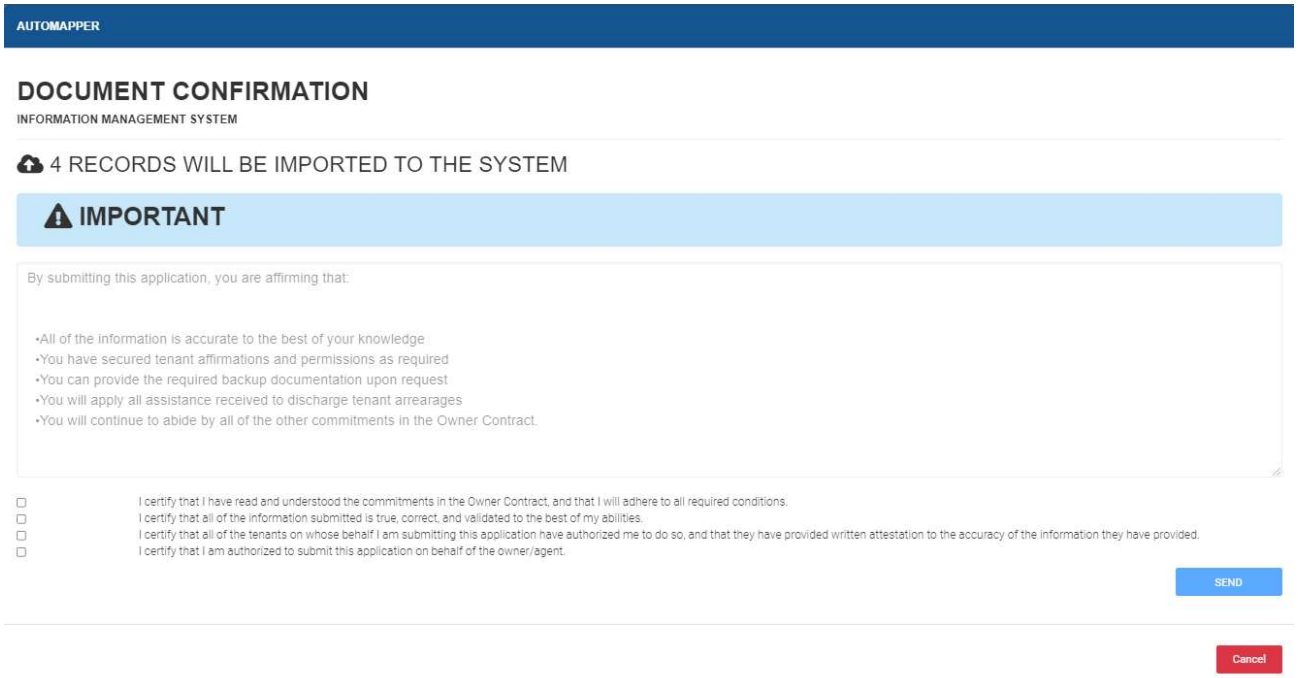
IMPORT UNIT / TENANTS / Validate Records and Fix Errors

- 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.



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.



VIEW PROJECT DETAILS

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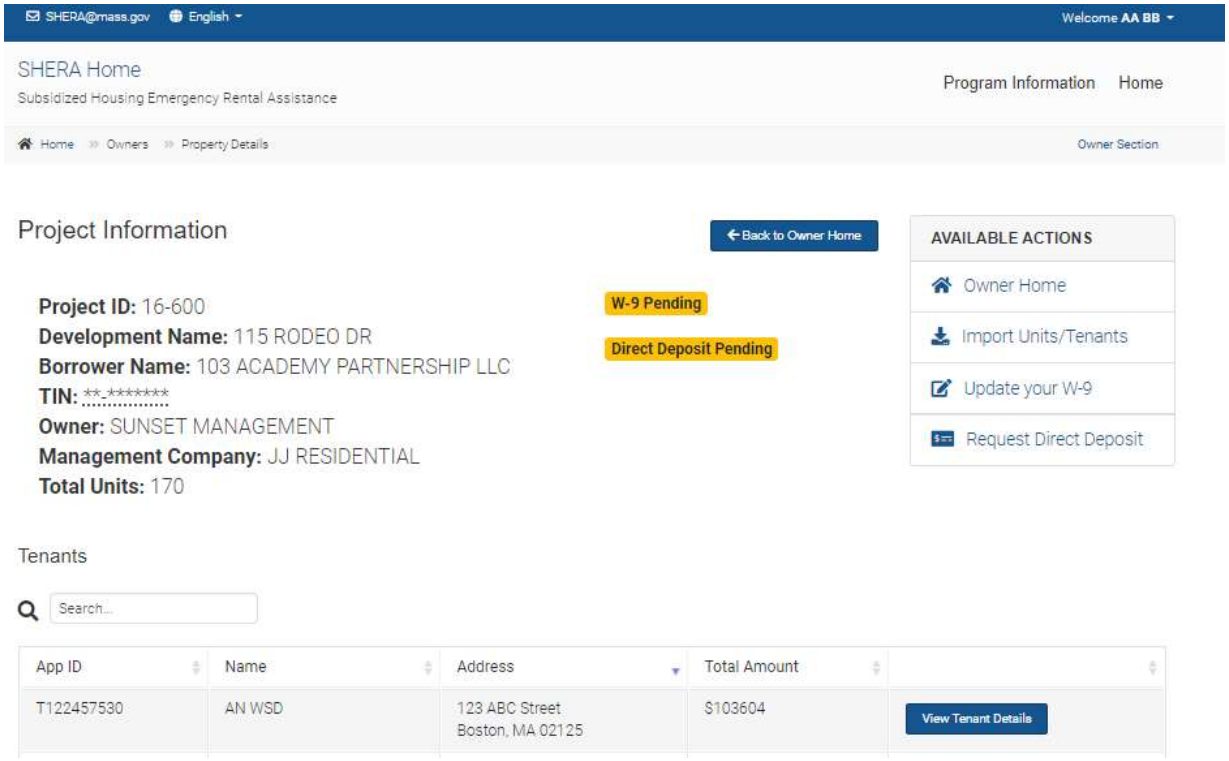
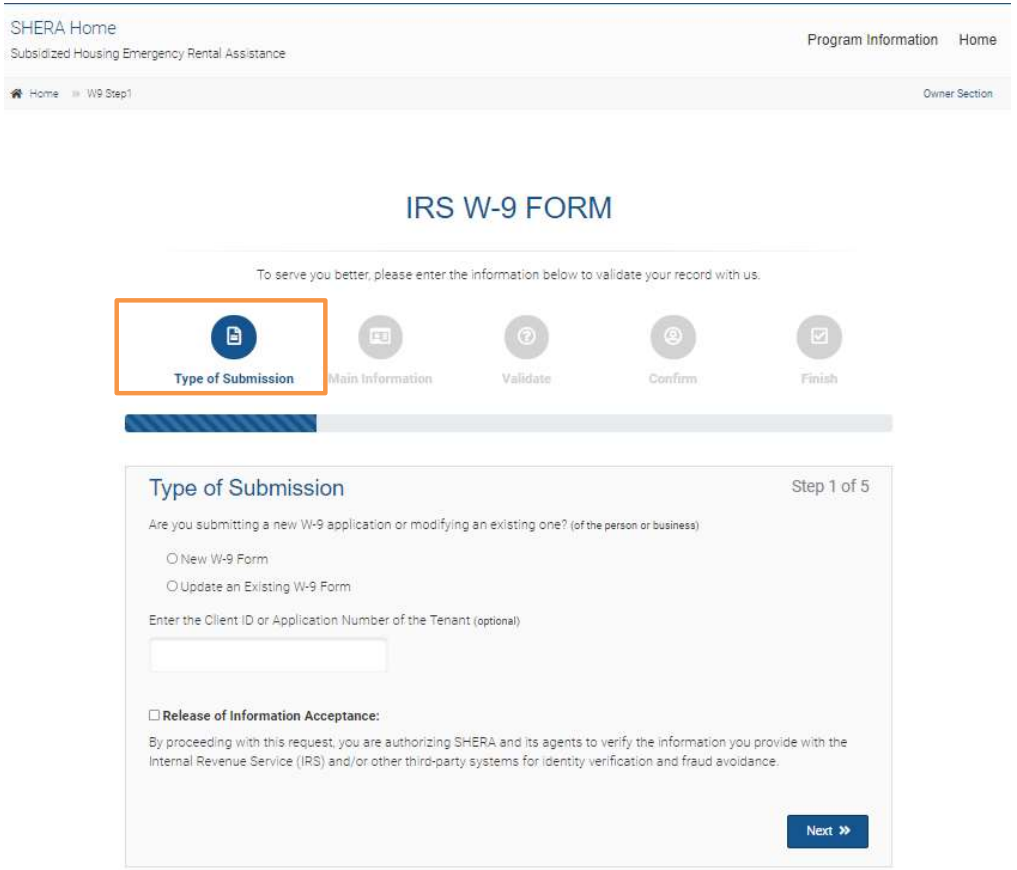
From the View Project Details you can access:

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



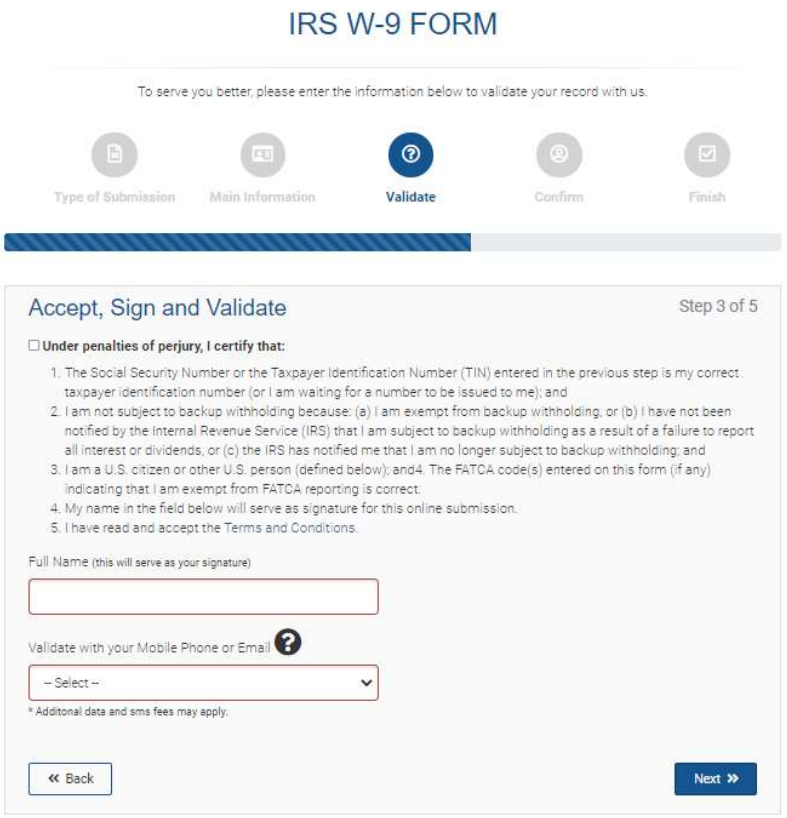
VIEW PROJECT DETAILS / Update your W-9

- 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.

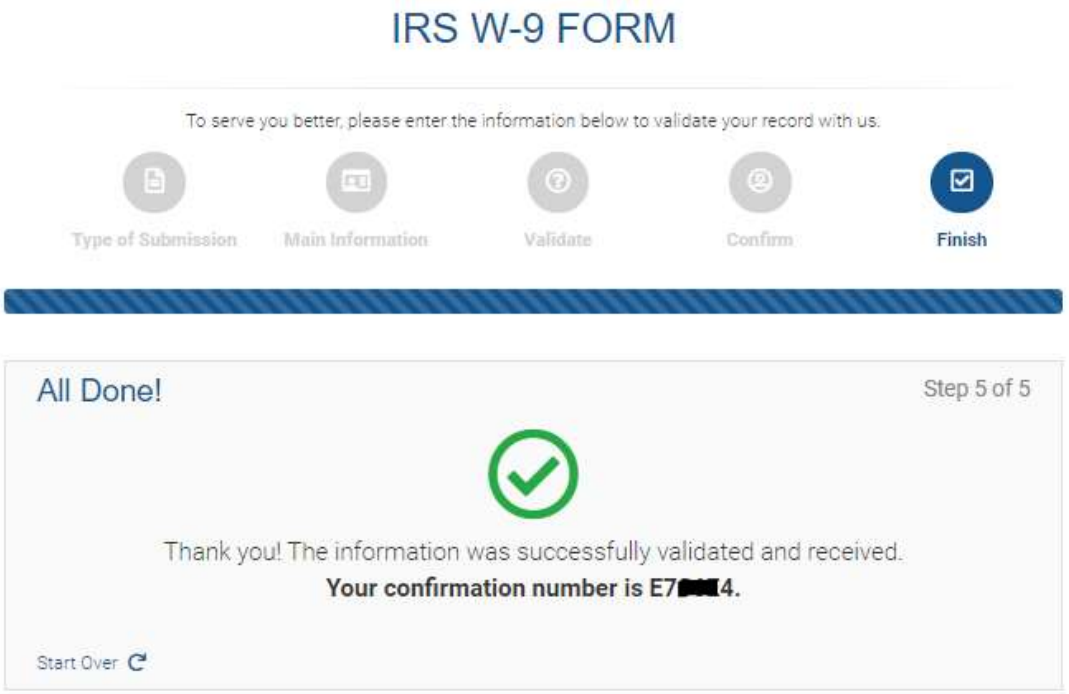


VIEW PROJECT DETAILS / Update your W-9

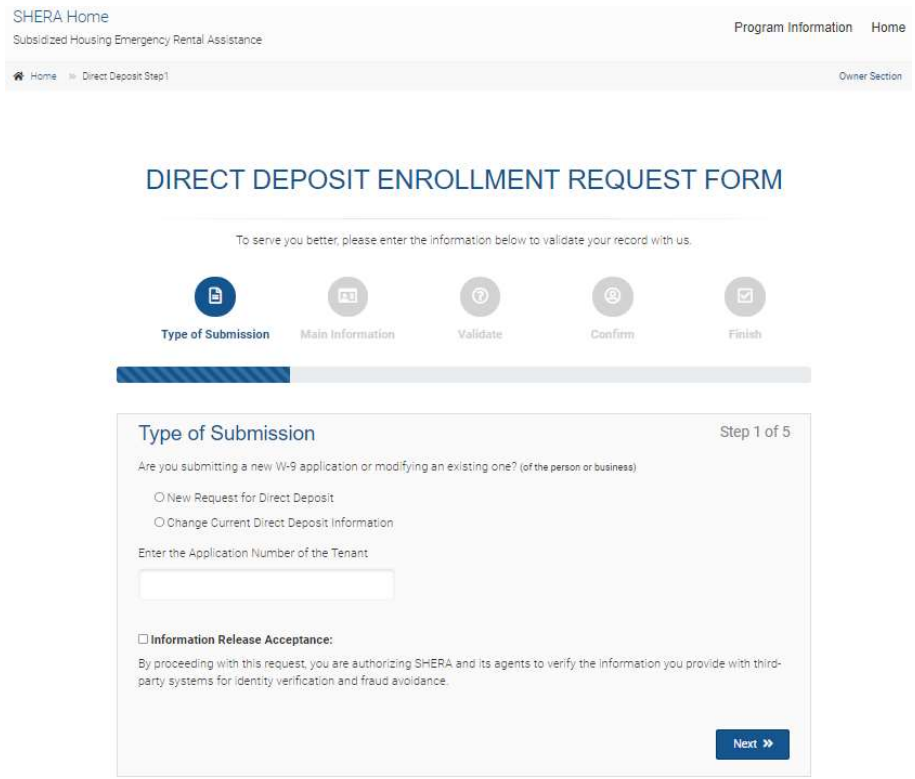
- Confirmation is completed after validation of data through a text code validation.



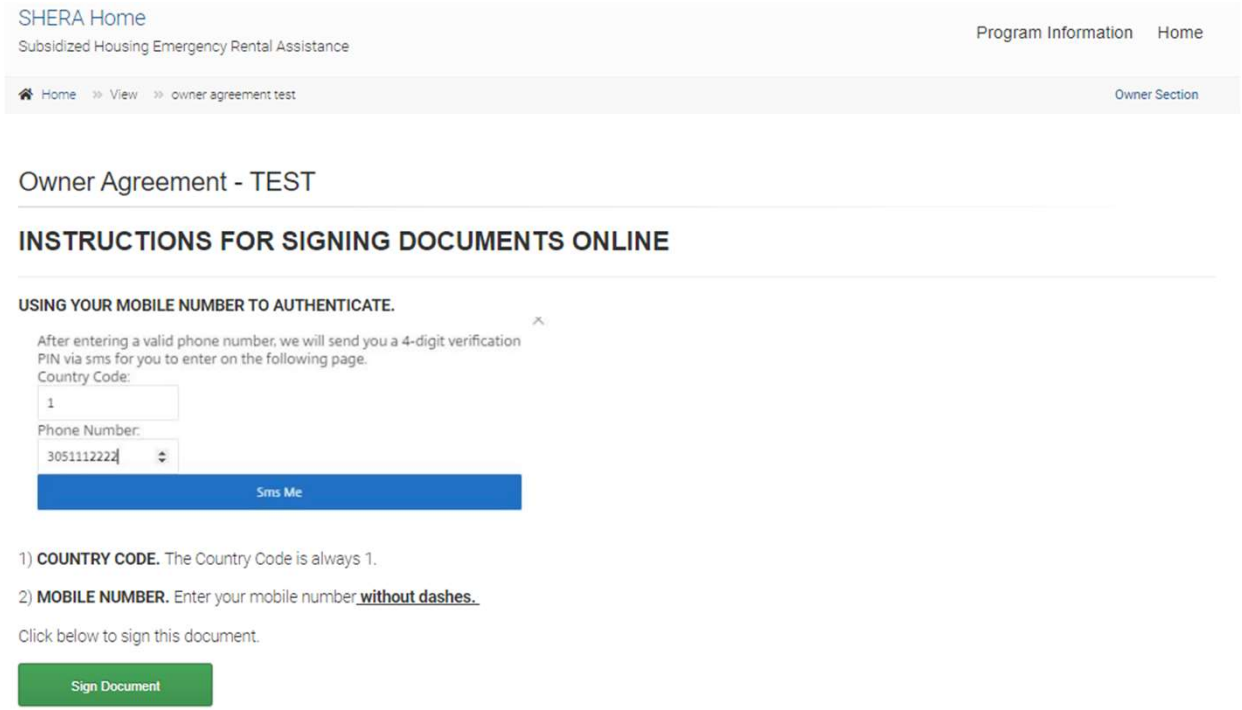
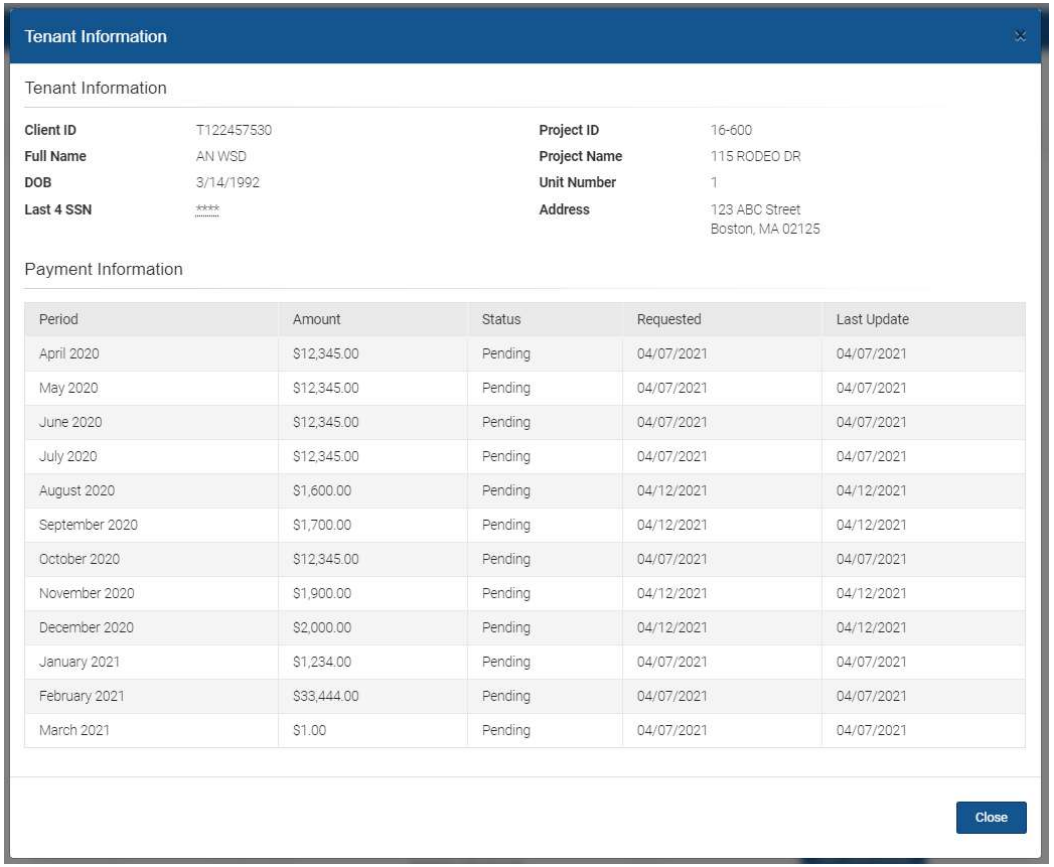
VIEW PROJECT DETAILS / Update your W-9



VIEW PROJECT DETAILS / Request Direct Deposit



VIEW PROJECT DETAILS / Sign Owner Agreement



VIEW PROJECT DETAILS / View Tenant Details