



# SHERA Application Readiness

June 24, 2021

Last Updated: July 7, 2021



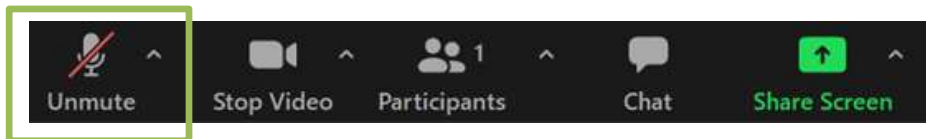
5/5/2021

# ENGAGEMENT BEST PRACTICES



## Please Mute

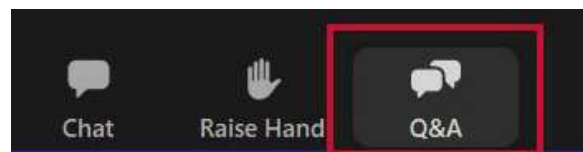
Please join the meeting muted during the session to keep interruptions to a minimum



## Asking Questions

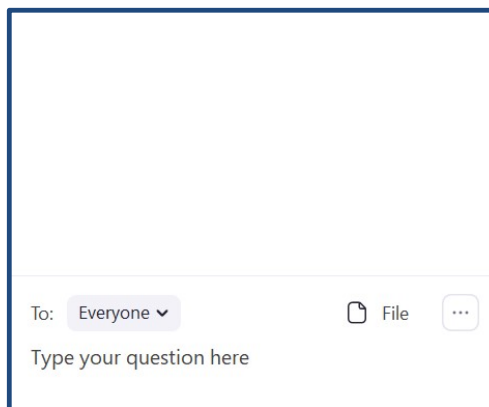
We will be monitoring the Q&A for questions

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



**Rob Muollo**

**Micqueen Clerger**

## TRAINING SUPPORT

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Accenture



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# Our Journey Today

I HOUR



**Training Goals & Objectives**



**SHERA Overview**



**Owner and Property Registration**



**Tenant Outreach and Eligibility**



**Application Requirements**



**Tips from Pilot Owners**



**Support, Resources, and Next Steps**



**Questions**



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# TRAINING OBJECTIVE



## Purpose



Review the steps to register and prepare to apply for the **Subsidized Housing Emergency Rental Assistance (SHERA) Program**

## Goal



**Provide guidance to better support property owners and tenants who are eligible for SHERA**



# WE WANT TO HEAR FROM YOU! *MENTI LIVE POLLS*



**What kind of property(ies) do you have?**

## How to Participate

1. Go to **Menti.com** on your smartphone or computer browser.
2. Enter the code **62 99 80 5** into the field shown to the right



Please enter the code

12 34 56

Submit

The code is found on the screen in front of you





# SHERA OVERVIEW



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# SHERA OVERVIEW



- SHERA is a **federally-funded emergency** housing assistance program that helps residents of public and affordable housing clear rent arrearages.
- SHERA offers a **single application** for multiple eligible residents in an eligible property.
- The period covered is **18 months** starting on **April 1, 2020**.
- This session is directed at SHERA-qualified owners of rent-restricted properties with DHCD Soft Debt or who are 40B, 40R, or LAUs.

# OWNER ELIGIBILITY: CRITERIA I – THRESHOLD ELIGIBILITY



**One of the following three conditions must be satisfied:**

- 1** The owner has an existing borrower relationship with MassHousing or Massachusetts Housing Partnership AND their sponsor is in good standing with MassHousing and MHP; **OR**
- 2** Sponsor is a Public/Local Housing Authority; **OR**
- 3** The sponsor has at least one property subject to use restrictions due to participation in a state or federal program that has 20 or more rental housing units.

# OWNER ELIGIBILITY: CRITERIA 2, 3, & 4



## **Criteria 2: In Good Standing**

Owners and their authorized property managers must be in good standing with the Commonwealth of Massachusetts and the federal government.



## **Criteria 3: Compliance Experience**

Owners or their designated representatives (for example, property managers) must have three years' compliance experience, and at least one staff member holding certification in compliance training recognized by the affordable housing industry. A list of approved compliance certifications is included at the end of the SHERA Policy Guidance.



## **Criteria 4: Owner Responsibilities and Commitments**

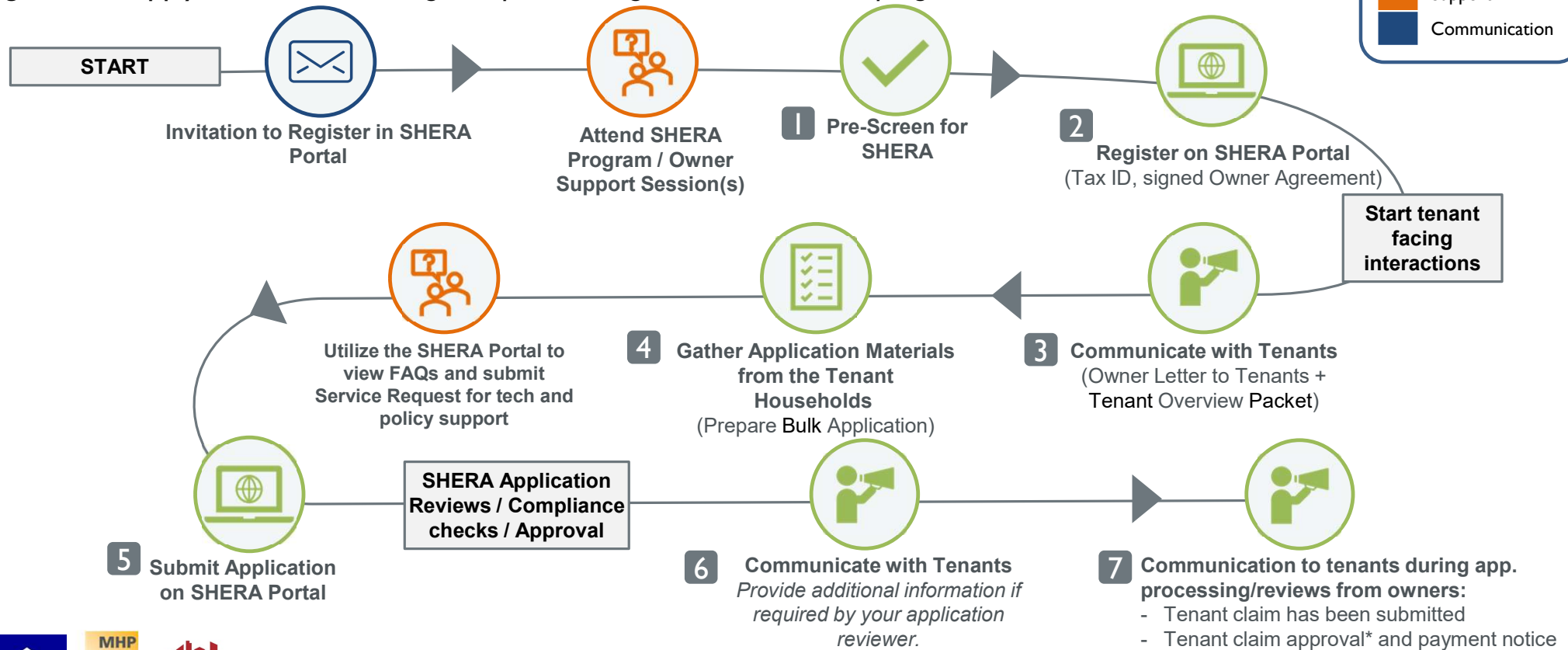
Owners participating in the program will be required to sign an Owner Agreement which outlines their responsibilities and commitments.



# 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:** Pre-screening is required to register for the SHERA program.



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

# REVIEW KEY DOCUMENTS



Once a property has pre-screened for SHERA participation and deemed eligible, the documents below will support eligible owners to **register, apply and communicate with tenants**:

- [SHERA Policy and Program Overview](#)
- [SHERA Tenant Notification Instructions](#)
- [SHERA Owner Outreach Letter to Tenants](#)
- [SHERA Owner FAQs](#)
- [SHERA Talking Points for Owners and Managers](#)
- [SHERA Administrative Review Procedural Guidance](#)

Found on SHERA Portal:

<https://www.mass.gov/info-details/subsidized-housing-emergency-rental-assistance-shera-program-for-owners>





# OWNER AND PROPERTY REGISTRATION



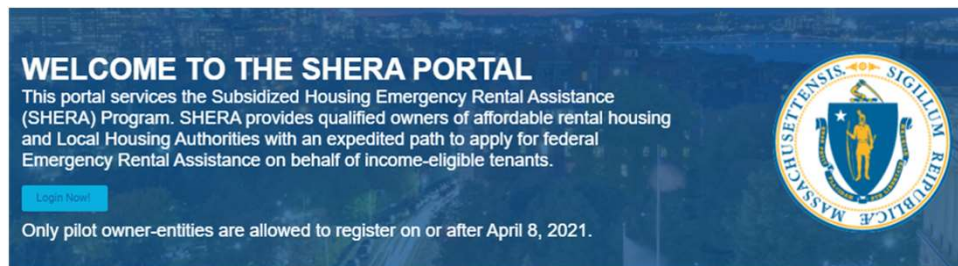
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# OWNER AND PROPERTY REGISTRATION (1/2)



**For eligible properties, the Owner Entity, or owner's authorized agent, should register on the SHERA Portal**

- Portal link: <https://sherafunding.mass.gov>
  - ✓ Program Information, documents, and webinar/training resources can be found on the home page tab of the SHERA Portal
- Owner vs. Sponsor
  - ✓ An "owner" is the legal entity that owns a particular property.
  - ✓ A "sponsor" may serve as the sponsor for multiple properties, and may be an organization with multiple, wholly-owned entities consolidated into their organizational financial statements



If you have a technical, policy, or other question, please submit a service request.



# OWNER AND PROPERTY REGISTRATION (2/2)



## Registration requirements for each property include:

- ✓ Enter Project ID
  - Sent to the Owner by DHCD with your invitation to register
- ✓ Electronically sign the Owner Agreement
  - You can also view the Owner Agreement in Program Information
- ✓ Complete the W-9 form with Tax Identification Number for the property
- ✓ Upload signed Compliance Training Certification
  - Available on portal in Program Information; lists acceptable certifications





# INITIAL COMMUNICATION WITH TENANTS



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# SEND TENANT OUTREACH LETTER



## Owners should identify eligible tenants and distribute the **SHERA Owner Outreach Letter to Tenants (including the SHERA Tenant Overview Reference Guide)** to all tenants with eligible arrearages

The outreach letter explains:

- ✓ The SHERA program
- ✓ Eligibility requirements
- ✓ How to apply for assistance

Dear **Tenant**:

We know that many residents have struggled during the COVID-19 crisis, and so we are excited to tell you about a new program that can help.

**IF YOU HAVE FALLEN BEHIND ON YOUR RENT BECAUSE OF COVID, WE CAN APPLY FOR EMERGENCY AID TO PAY THE RENT THAT YOU OWE.**

This rent would be paid directly to your landlord or property manager through the **Housing Emergency Rental Assistance (SHERA) program** that is funded by the federal government. We will need your assistance and permission to apply for these funds.

- You may be eligible for this rental assistance if:
  - Your household income is below the program limit, at or below 80% [Area Median Income \(AMI\)](#);
  - You owe rent that was due between April 1, 2020 and March 31, 2021;
  - You or someone in your household has lost income, and/or had a significant increase in expenses, because of COVID-19.

You will need to sign a sworn statement saying that this is true.

You may be eligible for SHERA regardless of your immigration status.

You do not need a social security number to apply. However, if you have a social security number, you will be required to provide the last four digits.

**SHERA Overview**

- The Subsidized Housing Emergency Rental Assistance (SHERA) program is a federally funded emergency housing assistance program for renters in subsidized housing impacted by COVID-19.
- Qualified owners of subsidized housing can apply for assistance on behalf of all their income-eligible residents with rental arrears.

**KEY POLICY GUIDELINES**

**1. ELIGIBILITY**

- The household has a household income at or below 80% [Area Median Income \(AMI\)](#);
- The household has experienced a financial hardship due to COVID-19;
- The landlord provides proof of non-payment of rent.

**2. ELIGIBLE USE OF FUNDS**

Eligible use of funds:

- Tenant-paid rent due between April 1, 2020 and March 31, 2021 (12 months);
- No dollar limit per household;
- Will only cover rental arrearages, not other landlord-imposed costs such as parking fees, pet fees, or damages;
- Does not cover utilities or moving expenses.

**3. TENANT CERTIFICATION**

The signed Tenant Certification attests to:

- COVID-19 Impact:** The tenant has incurred a financial hardship due to COVID-19;
- No Duplicative Assistance:** Assistance requested does not duplicate any other government assistance received for the same cost;
- Tenant Permission:** Gives owner permission to apply for benefits on tenant's behalf, and to share the information necessary for doing so.

**4. STEPS FOR TENANT**

- Work with your landlord to make sure your household qualifies
- Complete and sign the tenant certification to:
  - Certify that your financial hardship was directly or indirectly caused by COVID-19;
  - Affirm the amount of assistance you are seeking, based on the rent you owe between April 1, 2020 and March 31, 2021, and that you have not received and will not receive the same assistance from another program for the same months; and
  - Give your property owner permission to apply for back rent on your behalf

**5. TENANT NOTIFICATIONS**

Owners must provide participating tenants with notifications regarding:

- Documents needed to apply
- Confirmation of application submitted
- Requests for additional documents
- Application approval and payment to tenant account
- Application denial will be provided by DHCD

**6. PRIORITIZATION**

Funding will be prioritized for those who have been unemployed for 90 days or more and for those with a household AMI of 50% or lower at the time of application.

Department of Housing and Community Development | Mass Housing | Mass Housing Partnership 2



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# TENANT COMMUNICATION RESOURCES



**Several useful resources can be found on the SHERA Portal to help owners communicate with their tenants about the SHERA program.**

- 1 A sample SHERA Owner Outreach Letter to Tenants is available on the SHERA Portal home page in “Program Information” under SHERA Tenant Communications
- 2 Tenant Overview Reference Guide is a helpful resource for tenants (Overview, FAQs, Document checklist)
- 3 Talking Points for Owners & Managers are a helpful resource when communicating with tenants

All sample notifications are available in Spanish, Portuguese, Haitian Creole, Chinese, Vietnamese, Khmer and Russian.





# ADDITIONAL TENANT NOTIFICATIONS



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# ADDITIONAL TENANT NOTIFICATIONS

Tenant Notification #1: **SHERA Submission Letter to Tenants**

Tenant Notification #2: **Application Outcome**

- SHERA Payment Letter to Tenants - The SHERA Portal will also send tenants a payment confirmation as a supplemental notice if the tenant elected to do so in the Tenant Certification.
- Application Denial – DHCD will communicate all denials to the tenant and the owner.

Tenant Notification #3 **to nonresponsive or ineligible tenants (if applicable)**

- Notice of Ineligibility (Non-Participation Record and Notice of Outstanding Arrearages)

Tenant Notification #4 **for Owners not participating in SHERA (if applicable)**

- Information will be provided for Owner distribution to tenants regarding ERAP, administered by RAAs

See the SHERA Notification to Tenant Instructions and Form Letters on the [SHERA Portal](#)





# INELIGIBLE TENANTS



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# ADMINISTRATIVE REVIEWS FOR INELIGIBLE TENANTS (1/2)



Owners are expected to work with tenants who ask for a review of ineligibility determinations when the tenant is found ineligible by the owner during the preapplication stage.

## Notify the Tenant Immediately

The Owner must:

- Accept the tenant household's self-attestation of financial hardship due to COVID-19.
- Immediately notify the tenant of the reasons for ineligibility by sending a *SHERA Tenant Ineligibility Notice*. This notice will provide the tenant with the opportunity to ask the Owner for an administrative review, in writing, within 15 calendar days.

## Conduct the Administrative Review

Once the Owner receives this request, the Owner must designate someone who did not make the initial determination to review all submitted documentation to determine whether the tenant is eligible for SHERA within 15 calendar days of receiving the request.

# ADMINISTRATIVE REVIEWS FOR INELIGIBLE TENANTS (2/2)



## Communicate the Outcome

- If the Owner determines the tenant is eligible for SHERA, the Owner is expected to submit an application on the behalf of the tenant through the SHERA Portal; notify the tenant of the application submission; and continue with the SHERA claim process on the behalf of the tenant.
- If the Owner confirms that the tenant is ineligible for SHERA, the Owner must notify the tenant of the decision. In the redetermination notice, the Owner must include BOTH:
  - A statement encouraging the tenant to notify the Owner of any changed circumstances in the future in case the tenant may then be eligible for SHERA
  - A listing of available rental assistance resources, including information on the no-cost community mediation program.



# APPLICATION DOCUMENTATION



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# GATHER APPLICATION DOCUMENTATION



Owners should gather tenant household documentation and maintain a file for each tenant household.

Each household file should contain:

- ✓ Identification for Head of Household
- ✓ Last four digits of the Head of Household's Social Security Number
- ✓ Verification of current housing (e.g. lease, tenancy agreement)
- ✓ Tenant Certification of Rental Assistance Eligibility
- ✓ Documentation of qualified rent arrearages owed
- ✓ Verification of income
- ✓ Lease(s) effective during the term of the rental assistance



# SHERA Tenant Certification of Rental Assistance Eligibility



**SHERA Tenant Certification of Rental Assistance Eligibility form includes many of the data points that may not reside in your property management system**

*SHERA | Subsidized Housing Emergency Rental Assistance Program*

**CERTIFICATION OF RENTAL ASSISTANCE ELIGIBILITY FOR THE Subsidized Housing Emergency Rental Assistance (SHERA) Program**

**PART 1: ASSISTED HOUSEHOLD INFORMATION AND ELIGIBILITY**

Property Name	Building Address	City/Town	Zip
Tenant Name (Head of Household)	Tenant Unit # (the "Unit")		
Tenant Date of Birth (mm/dd/yyyy)	Last four digits of SSN	Office use only	
Email	Phone		

**Head of Household information**

1) Do you have difficulty understanding English?  
☐ Yes  
☐ No

2) Is English your primary language?  
☐ Yes  
☐ No. What is your preferred language?  
\_\_\_\_\_

3) What is your gender?  
☐ Female  
☐ Male  
☐ Nonbinary  
☐ Choose not to respond

4) What is your race?  
☐ American Indian or Alaska Native  
☐ Asian or Pacific Islander  
☐ Black or African American  
☐ White  
☐ Some other race  
☐ Choose not to respond

5) Are you of Hispanic, Latino, or Spanish origin?  
☐ Yes  
☐ No  
☐ Choose not to respond

6) In addition to receiving formal written notices on your application status, do you also want to receive updates by email or by SMS text message?





# SUBMITTING THE SHERA APPLICATION



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# SUBMIT THE SHERA APPLICATION (1/3)



- 1 Owners must provide a list of data elements for each tenant rental arrearage claim in an excel or csv file.
- 2 Each **file** represents one application. Each **row** in the application represents a tenant claim.
- 3 Owners upload the application onto the SHERA Portal: <https://sherafunding.mass.gov>
- 4 Once an application is uploaded into the Portal, each tenant claim is assigned a unique identifier for tracking, payment, and reporting purposes.
- 5 Applications will be processed, and payments made directly to the property's legal ownership entity for each approved tenant claim within an application.

**Tenant Claim:** The individual tenant household application.

**Application:** The properties application file made up of several tenant claims.

**Note:** on the SHERA Portal all applications, tenant or owner are called applications

# SUBMIT THE SHERA APPLICATION (2/3)



- Each tenant claim in an application must contain:
  - Address for each unit (matched against owner-registered list)
  - Tenant information (many of these are included on Tenant Certification form)
    - ✓ Head of household: First and last name, middle initial (optional)
    - ✓ Head of household: Date of birth
    - ✓ Head of household: Gender
    - ✓ Head of household: Race
    - ✓ Head of household: Ethnicity
    - ✓ Head of household: Last four digits of social security number
    - ✓ Cell phone – optional (required if no email)
    - ✓ Email – optional (required if no cell phone)
    - ✓ Limited English Proficiency – optional
    - ✓ Language preference
    - ✓ Total number of household members
    - ✓ Household gross income
    - ✓ Tenant's share of the contracted rent owed for each month from the eligible 18-month SHERA period starting on April 1, 2020
    - ✓ Rent arrearage payment requested for each month



## SUBMIT THE SHERA APPLICATION (3/3)



- Excel template is available on the SHERA portal
  - Owners can design their own reports to match the required data fields
  - The portal can import .xls, .xlsx, or .csv files
  - Owners will have the opportunity to match the data fields in internal reports to the required data fields to make import automatic
- Step-by-step instructions (complete with screen shots) are available on the SHERA Portal in the Application Material section: [SHERA Portal User Guide](#) and [INSTRUCTIONS - SHERA Application Data Fields](#)

A recorded technical training on how to use the SHERA portal is available:

[https://www.youtube.com/watch?v=Glva\\_VLIDrM](https://www.youtube.com/watch?v=Glva_VLIDrM)





# APPLICATION REVIEW PROCESS



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# APPLICATION REVIEW PROCESS (1/2)



## Know the steps in the application review process:

- DHCD is responsible for final application review and for approving all assistance payments.
- The SHERA Portal will conduct a range of system checks that verify:
  - Each household's arrearage amount is less than or equal to the household's portion of the monthly rent obligation
  - Assistance is only provided for units at qualifying and validated properties
  - All required information has been provided
  - There are no duplicate or overlapping requests
  - All required documentation has been uploaded

## APPLICATION REVIEW PROCESS (2/2)



- If a tenant claim does not pass the automatic Portal system checks just listed, that individual claim will be:
  - Returned to the Owner, OR
  - Flagged as an "exception" for secondary review by DHCD, MassHousing or MHP to clear up the exception for that claim or confirm a rejection is correctly determined
  - Reviewers may email the Owner a request for additional documentation
- The following tenant claims will be rejected:
  - Any request for assistance for a unit that has not been registered as a qualified address in a qualified property
  - Any request for assistance that exceeds the tenant share of contracted rent for the unit for any given month, or
  - Any duplicate requests for assistance for a particular unit for a given month, or for a particular tenant for a given month, based on the unique identifiers of both tenants and unit addresses



# TIPS FROM PILOT OWNERS



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# TIPS FROM PILOT OWNERS (1/2)



- Get organized and set up (document collect can take at least two weeks)
  - Review all SHERA program/policy materials
  - Create a work plan
    - Identify and empower a key staff person
    - Determine what is centralized/done at the site level
    - Keep a centralized list of properties and ID numbers, as well as staff assigned to SHERA for each
    - Determine how the application spreadsheet will be populated; some have had software vendor build
    - Consider phasing
      - Registration process – consider completing a week prior to submitting an application; complete at corporate/central level
      - Application process – submit applications weekly as individual tenant claims are completed
    - Prepare materials on letterhead, etc.
    - Schedule tenant outreach – Outreach Letter, phone calls, knock on doors



## TIPS FROM PILOT OWNERS (2/2)



### ■ Implementation tips

- Develop and deliver staff training on the program, the documents, and the Portal
- Anticipate a more favorable initial response from tenants than with other emergency rental relief programs; not as complicated for the tenant as other programs; not as much follow up required by Owner
- Plan on two to three weeks to complete tenant outreach and have all information for an application; consider phasing outreach to coincide with when rent is due
- Plan to implement all rent arrearage applications over a few months



# APPLICATION SUPPORT



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# SUBMITTING A TICKET ON THE PORTAL



## Service Request

### 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

Please make sure to include your **Project ID** if you already successfully pre-screened for the SHERA Program and as much information/context as possible.

# Housing Mediation Program



- **Free** program which helps find flexible solutions that work for both the landlord and the tenant
- Program information:  
<https://www.resolutionma.org/housing>
- Find the mediation center in your city:  
<https://hedfuel.azurewebsites.net/>

## Benefits of Mediation

- Agreements reached collaboratively have better rates of compliance
- Allows for creative, flexible solutions
- Usually cheaper and faster than legal action

## Eligibility

- Risk of eviction due directly or indirectly to COVID-19
- **No** cost
- **No** income eligibility criteria
- **No** court referral required (available even before an eviction is filed)

*“Mediation is the best thing! We both should feel good that we helped a good family. I don’t ever want to evict them, but I just wanted to light a fire under them to get rental assistance...” – Landlord in Natick*





# RESOURCES & NEXT STEPS



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# RESOURCES



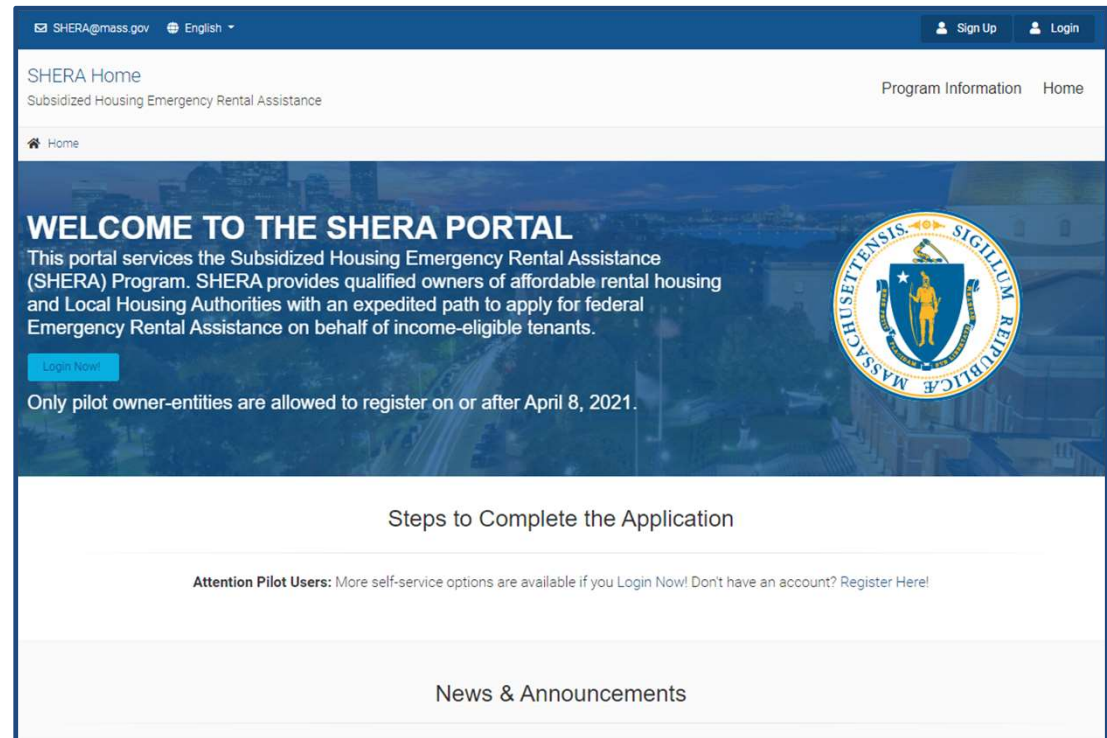
## RESOURCES

- Review materials on the SHERA Portal Program Information tab <https://sherafunding.mass.gov/>
  - SHERA Policy Guidance
  - 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.



# NEXT STEPS



1 **WATCH OUT FOR** the SHERA Pre-Screening Invitation

2 **REVIEW** the [SHERA application data](#).

- 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: If you successfully pre-screen for SHERA participation you will receive a notification that you are able to register and submit applications

3 **SEND/SHARE** the [Owner Letter to Tenants](#) and the [Tenant Certification](#).

- 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.*





# QUESTIONS



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THANK YOU!



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