

HEROS



QUICK GUIDE



Partner User Role Part 58

2019





WHAT ARE HEROS QUICK GUIDES?

The HEROS Quick Guides are intended to provide a brief summary of specific actions within HEROS. For complete guidance and screen by screen instruction, review the HEROS User Guide.

USING HEROS AS A PARTNER

The purpose of this document is to provide instructions to Partner Users (i.e. third-party consultants, Public Housing Authorities (PHAs), and other non-Responsible Entity (RE) recipients) assisting with the preparation of Part 58 Environmental Reviews in HEROS. This guide will help Partner users navigate through the HEROS system.

Partner Users represent organizations that work with HUD and/or a RE to prepare environmental reviews under Part 50 or 58. Partner organizations may be HUD recipients, including PHAs, nonprofits, and Tribally Designated Housing Entities (TDHEs), or consulting firms that have been contracted to assist with the environmental review process. Partner Users may start environmental reviews in HEROS and complete much of the analysis. However, the Partner User roles is distinct because unlike RE and HUD Users, Partner Users may not make any determinations or findings or take any steps to finalize the review.

Getting Started

For basic information on using HEROS, including instructional videos and frequently asked questions, go to the [HUD Exchange HEROS webpage](#).

For an overview on navigating the HEROS system, watch the [Using HEROS for Partner Users \(Part 58\) webinar](#).

Technical questions about HEROS should be submitted through [HUD Exchange Ask A Question](#). For guidance on environmental policies and requirements, please reference the [HUD Exchange Environmental Review webpage](#) or contact your local [HUD Field Environmental Officer](#).

Regional Roll-Out

Beginning August 2018, HUD rolled out access on a regional basis to Partner users for Part 58 Environmental Reviews in HEROS. The Responsible Entity organization you are working with must have access to HEROS for you to sign-up as their Partner.

The roll-out schedule for Community Planning and Development (CPD) Partners is as follows:

| HUD Region | States | Anticipated Roll-Out |
|------------|----------------------------|----------------------|
| 8 | CO, MT, ND, SD, UT, WY | August 2018 |
| 9 | AS, AZ, CA, GU, HI, MP, NV | October 2018 |

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|----|--|---------------|
| 3 | DC, DE, MD, PA, VA, WV | November 2018 |
| 4 | AL, FL, GA, KY, MS, NC, PR, SC, TN, VI | February 2019 |
| 2 | NJ, NY | March 2019 |
| 10 | AK, ID, OR, WA | April 2019 |
| 5 | IL, IN, MI, MN, OH, WI | May 2019 |
| 7 | IA, KS, MO, NE | June 2019 |
| 1 | CT, ME, MA, NH, RI, VT | July 2019 |
| 6, | AR, LA, NM, OK, TX | August 2019 |

Obtaining HEROS Access

1. HUD will notify all Responsible Entities in the Region when HEROS is available for Partners.
2. The RE will then notify their Partners that they can sign-up for HEROS access. Partners can only sign-up when the RE Organization has registered users in HEROS.

Note: RE and Partner users can sign-up for HEROS at the same time.

3. Access is requested through an online access request form:
https://docs.google.com/forms/d/e/1FAIpQLSdzD9KpXZKdVw1cRgqqc9g4Z0ZDXK7DnvKfL10f4bZJmRU1QQ/viewform?usp=sf_link

Note: The link to the HEROS Access Form is also provided by HUD in the notification. If there is any missing information in your request, HUD will follow-up with you directly.

4. You will be notified, via email, when your account is set-up

Note: This process typically takes 3-4 weeks.

Logging in to HEROS

1. Log into HEROS at <https://heros.hud.gov/heros/>.
2. For Profile Selections, select the name of your organization in the “Partner” dropdown menu and then select the name of the RE organization for a Part 58 review or select HUD for a Part 50 review.

Partner

Responsible Entity or HUD

- You will be directed to **Screen 1020 – My Environmental Reviews** dashboard. This screen will default to only show reviews that are currently *assigned* to you, meaning that you can currently edit them. From this screen, you can select an existing review to edit or assign to another user.

HUD Environmental Review Online System (HEROS) HEROS version 8.0.0.1889-3572

HEROS Home Guide to HEROS

My Environmental Reviews Admin Switch Profile Logout

My Environmental Reviews (50/58)

HEROS integrates guidance and assistance into the environmental review format, but it is not a substitute for learning and understanding HUD's environmental review process and all environmental laws and authorities addressed in this system. Responsible Entities are encouraged to attend regular environmental trainings led by HUD staff and ensure that they are familiar with all relevant environmental laws and authorities. HEROS users remain responsible for ensuring that their environmental review records are accurate and complete.

Show Reviews Assigned to Me

| Name of Project | City | State | Status | Level of Review | Last Updated | Assigned To | ER ID | Generate ERR | Cancel or Reopen | Part 50/58 |
|---|-----------|-------|-------------|-----------------|------------------------------|----------------|-----------------|--------------|----------------------------------|------------|
| Project-4---New-Construction-of-Multifamily-Development | Denver | CO | In progress | EA | Wed Jan 23 09:49:54 EST 2019 | Benjamin Sturm | 900000010030693 | | <input type="button" value="x"/> | Part 58 |
| Project-5---Sample-Project | Somewhere | CO | In progress | EA | Wed Dec 19 11:55:39 EST 2018 | Benjamin Sturm | 900000010030701 | | <input type="button" value="x"/> | Part 58 |
| Project-3---Tenant-Based-Rental-Assistance | Denver | CO | In progress | CENST | Mon Dec 17 10:36:54 EST 2018 | Benjamin Sturm | 900000010030691 | | <input type="button" value="x"/> | Part 58 |
| Project-2---Public-Services | Denver | CO | In progress | EXEMPT | Mon Dec 17 10:33:41 EST 2018 | Benjamin Sturm | 900000010030689 | | <input type="button" value="x"/> | Part 58 |
| Project-1---Infrastructure-Improvements | Denver | CO | In progress | CEST | Mon Dec 17 10:28:41 EST 2018 | Benjamin Sturm | 900000010030687 | | <input type="button" value="x"/> | Part 58 |

Starting an Environmental Review

- To start a new review, press the <Start a new environmental review> button in the upper left corner of the My Environmental Reviews dashboard.

My Environmental Reviews Admin Switch Profile Logout

My Environmental Reviews (50/58)

HEROS integrates guidance and assistance into the environmental review process and all environmental laws and authorities addressed in this system. Responsible Entities are encouraged to attend regular environmental trainings led by HUD staff and ensure that they are familiar with all relevant environmental laws and authorities. HEROS users remain responsible for ensuring that their environmental review records are accurate and complete.

Name of Project

Project-4---New-Construction-of-Multifamily-Development
 Project-5---Sample-Project

- You will first see Screen 1101 – Review Type, which asks whether you’re starting a Part 50 or Part 58 review. You should be able to select one or the other based on whether you are currently linked to HUD or RE – but make sure to choose correctly.

My Environmental Reviews Admin Switch Profile Logout

1101 – Review Type (50/58 - Non-Tiered)

Do you want to start a review under Part 50 or Part 58?

Part 58 (when states, cities, tribes, or units of local government assume HUD's environmental review responsibilities)

Part 50 (when HUD staff is responsible for completion of the environmental review)

Cancel Save and Continue

- Next, you'll be taken to Screen 1105 – Initial Screen, where you will provide all initial project information. You may or may not have all necessary information to complete this screen. If you need more, you can ask the project sponsor or provide a placeholder for HUD or the RE to update when the review is assigned to them.

HUD Environmental Review Online System (HEROS) HEROS version: training-1886-35572

HEROS Home Guide to HEROS

My Environmental Reviews Reports Admin Switch Profile Logout

1105 – Initial Screen (50/58 - Non-Tiered)

Environmental Review Record created on March 08, 2019 by Benjamin Sturm.

Indicates that field is required

Project Name:

HUD Funding Source:
Include only funding sources for which this review will fulfill HUD's environmental review requirements. Do not include funding sources that will require a separate environmental review (e.g. if this project receives funding from both Part 50 and Part 58 programs).

| Grant/Project Identification Number | HUD Program | Program Name | Delete |
|-------------------------------------|----------------|----------------|----------------------|
| <input type="text"/> | Select Program | Select Program | <input type="text"/> |

Add Another Funding Source

Estimated Total HUD Funded, Assisted, or Insured Amount(\$): \$

Estimated Total Project Cost: \$
This may be the same as the total HUD-funded, assisted, or insured amount.

Does this project anticipate the use of funds or assistance from another Federal agency in addition to HUD?
 No
 Yes

State / Local Identifier (optional):

Responsible Entity (RE) Information:
Organization Name: DENVER
Address: City and County Of Denver
Denver
Colorado
80202

Be sure to familiarize yourself with any program guidance on completing this screen. Some programs and offices have guidance or “cheat sheets” with specific instructions on how to use HEROS as a partner.

- At the bottom of screen 1105, you'll be prompted to enter Partner information – this looks different in Part 50 and Part 58. For Part 58, Screen 1105 has space to enter information on both Partner User (Recipient) or Partner User (Consultant).

Grant Recipient Information (if different from Responsible Entity):
Complete this section only if the grant recipient is not acting as the Responsible Entity.

Search Other None

Consultant Information:
Complete this section only if you represent a consultant firm or other contractor assisting with the environmental review.

Search Other None

Cancel Save and Continue

5. If Partner User (Recipient), start by searching to see if the recipient organization is in HEROS.
- Press the search radio button and the 'select partner' dropdown. If the recipient is in HEROS and linked to this RE, they will appear here.

Note: A PHA code will appear if the recipient is a PHA.

- Manually enter the point of contact from the recipient who should be consulted on this environmental review.

Grant Recipient Information (if different from Responsible Entity):
Complete this section only if the grant recipient is not acting as the Responsible Entity.

Search Other None

Name of Organization:

Name of Point of Contact:

Consultant Information:
Complete this section only if you represent a consultant firm or other contractor assisting with the environmental review.

Search Other None

Cancel Save and Continue

6. If Partner User (Consultant), follow the same process as Step #5.

*Note: Unlike the recipient information, you should only complete this section if **you** represent the consultant organization. If there is a consultant organization involved in the process, but is not using HEROS, there is no need to provide their information here.*

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Consultant Information:
Complete this section only if you represent a consultant firm or other contractor assisting with the environmental review.

Search Other None

Name of Firm: Denver Consultants ▼

Name of Preparer: Joel Warren

Cancel Save and Continue

7. Click <Save and Continue> and proceed through the screens following the usual steps in the environmental review process.
8. On Screen 1311 – Level of Review, as a Partner User, you do NOT have the authority to determine a proposed project’s level of review. However, you can make an advisory recommendation to the RE or HUD by selecting a level of review on this screen.

Note: You may want to discuss this decision with the RE or HUD before continuing or may need assign the review over to them depending on program protocols.

Select the level of review and all applicable activities and citations.

Completing Analysis with Related Laws and Authorities

1. On Screen 2005, click on the Compliance Factor link to access a separate screen to answer and provide documentation on the specific Compliance Factor.
2. Respond to each question as completely and accurately as possible to determine whether the project complies (or can comply conditioned upon mitigation) with that law or authority.
3. Press the <Next> button to move on to the next question.
4. HEROS requires you to respond to all system-generated questions before you can upload supporting documentation.

NOTE: As a Partner User, you will not be able to complete the full analysis for all laws and authorities.

- *Example: Partners should not begin Section 106 consultation under the National Historic Preservation Act, Section 7 consultation under the Endangered Species Act, or the 8-step Process under Part 55.*

5. In “Screen Summary” a compliance determination will be automatically generated, but you should use this space to clearly state any notes, comments, or suggestions for the RE staff who will complete the environmental review. Explain what actions were taken and your suggested course of action.
 - Your compliance determination should make it clear to the RE which responses are final and which are only advisory.

Screen Summary

Compliance Determination

Describe the basis that led to your determination here, identifying all key elements from your support documentation that substantiate you to edit this language to provide a clear description of your determination and a synopsis of the information that it was based on, such as:

- Map panel numbers and dates
- Names of all consulted parties and relevant consultation dates
- Names of plans or reports and relevant page numbers
- Any additional requirements specific to your region

Based on Section 106 consultation the project will have No Adverse Effect on historic properties. Conditions: None. Upon satisfactory implementation of the conditions, which should be monitored, the project is in compliance with Section 106.

***NOTES FROM PARTNER: [Enviro](#) Professionals has not initiated consultation or contacted the [SHPO](#) or [Pamunkey](#) Indian Tribe. [Environ](#) Professionals recommends that HUD initiate consultation with both organizations (see attached documents for contact information). This project site is a contributing historical structure located in a historic district (see attached map.) [Enviro](#) Professionals has also prepared a list of suggestions to ensure that the rehabilitation conforms to the Secretary’s Standards, and it believes that if the repairs conform to these suggestions, that the RE will be able to make a finding of No Adverse Effect. |

6. The final question on each law and authority screen asks whether formal compliance steps or mitigation is required. As a partner user, this question is grayed out and you cannot enter a response. Once you have assigned the review to the RE, they will evaluate your entries, make edits as necessary, and complete each screen by responding to this question.

Are formal compliance steps or mitigation required?
Only Responsible Entity (for Part 58) or HUD (for Part 50) Users may respond to this question. Ensure that this question is complete before finalizing the review.

Yes

No

Environmental Assessments

1. For an Environmental Assessment, on Screen 4010 – EA Factors, you will conduct initial analysis for each EA Factor and upload all applicable maps and documents.
2. Utilize the resources found on the [HUD Exchange Environmental Assessments webpage](#) to help guide you through analysis of a project’s

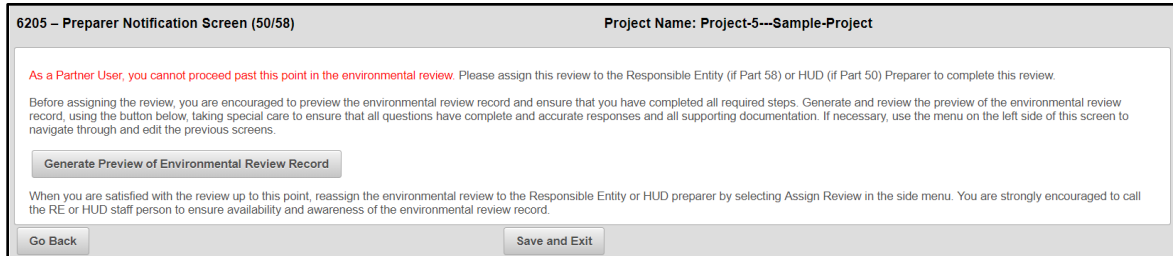
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impacts on land development, socioeconomic factors, community facilities and services, and natural features.

3. Once you have assigned the review to the RE, the RE staff will complete all compliance requirements, makes findings and determinations.

Submitting the Review to the Responsible Entity

1. When all of your analysis is complete, on Screen 6205 – Preparer Notification, click the <Generate Preview of Environmental Review Record> button.



6205 – Preparer Notification Screen (50/58) Project Name: Project-5---Sample-Project

As a Partner User, you cannot proceed past this point in the environmental review. Please assign this review to the Responsible Entity (if Part 58) or HUD (if Part 50) Preparer to complete this review.

Before assigning the review, you are encouraged to preview the environmental review record and ensure that you have completed all required steps. Generate and review the preview of the environmental review record, using the button below, taking special care to ensure that all questions have complete and accurate responses and all supporting documentation. If necessary, use the menu on the left side of this screen to navigate through and edit the previous screens.

When you are satisfied with the review up to this point, reassign the environmental review to the Responsible Entity or HUD preparer by selecting Assign Review in the side menu. You are strongly encouraged to call the RE or HUD staff person to ensure availability and awareness of the environmental review record.

2. Review the generated ERR to ensure that you have completed all screens as fully and accurately as possible at this stage.
NOTE: Be sure to save this ERR for your records in case any of your entries are lost.
3. As a Partner User, you cannot proceed past Screen 6205.
NOTE: This is the final screen for most Partner Users, unless you are representing a recipient or subrecipient of HUD assistance. Then you may be granted privileges to edit Part 3 of Screen 7015.15 Request for Release of Funds and Certification.

PARTNER USER ROLE

4. Click the <Assign Review> button in the side-menu to assign the review to another user – this may be the RE or another preparer depending on the type of review and your responsibilities.

