

HEROS

QUICK GUIDE



Completing a HEROS Access Form Request

November 2020





WHAT ARE HEROS QUICK GUIDES?

The HUD Environmental Review Online System (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](#).

COMPLETING THE HEROS USER ACCESS FORM REQUEST

The purpose of this guide is to provide instructions to complete the HEROS Access Form to use HEROS.

These instructions will cover access requirements for three primary groups:

- A. **Responsible Entity (RE):** This user is responsible for creating Part 58 environmental reviews for their jurisdiction. REs are typically staff of HUD's Office of Community Planning and Development (CPD) entitlement communities.
- B. **Part 58 Partner:** This user works with the RE organization to prepare Part 58 environmental reviews. This may include consultants or third-party agencies that do not have the authority to complete their own Part 58 environmental reviews, such as a Public Housing Authority (PHA) or a non-RE recipient.
- C. **Part 50 Partner:** This user works directly with or for HUD to prepare or review Part 50 environmental reviews.

What is the HEROS Access Form?

To access HEROS, all users must have a HUD user account (a B or C ID account and password) that is currently in "Active" status and authorized to access HEROS.

To apply for a user account, RE and partner users need to complete the [HEROS Access Form](#).

The HEROS Access Form is designed to record vital user information for HEROS users to create a new account and/or profile in the system. After the form is completed, HUD will validate the requestor's information and confirm that the requested user role and privileges are correct, then set up the user account. When approved with a user ID and password, a System Security Administrator (SSA) in the Office of Environment & Energy (OEE) will set up the new user's profile in HEROS. Users will be informed via email when their HEROS account is activated and ready for use.

**Note: If you are already in the process of or will be requesting access to the Integrated Disbursement and Information System (IDIS) or other HUD online system, please wait until you have your HUD B or C issued user ID before requesting access to HEROS.*

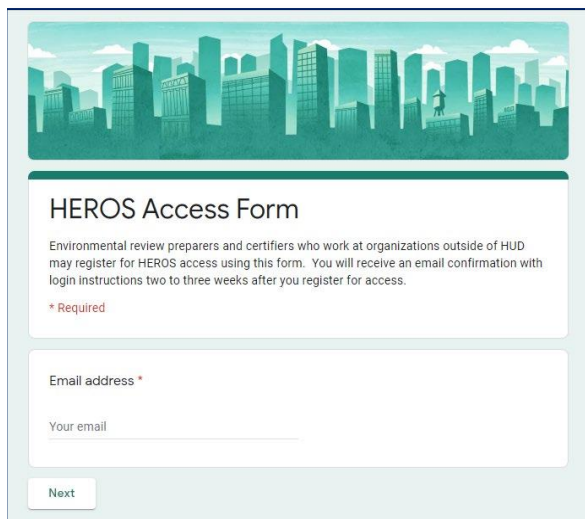
COMPLETING A HEROS ACCESS FORM REQUEST

HEROS Access Form: Detailed Instructions

Navigate to the [HEROS Access Form](#) landing page. All fields throughout the electronic form must be completed in order to proceed to the next page.

You will begin by entering your e-mail address.

Step 1: E-mail

The screenshot shows the 'HEROS Access Form' registration page. At the top is a teal city skyline graphic. Below it, the title 'HEROS Access Form' is displayed. A paragraph explains that environmental review preparers and certifiers at non-HUD organizations can register for access, with a confirmation email arriving in two to three weeks. A red asterisk indicates a required field. Below this is a text input field labeled 'Email address *' with the placeholder text 'Your email'. At the bottom left of the form is a 'Next' button.

- You will see a prompt:
Environmental review preparers and certifiers who work at organizations outside of HUD may register for HEROS access using this form. You will receive an email confirmation with login instructions two to three weeks after you register for access.
- **Action:** Enter your e-mail address in the field provided.
- **Action:** Click **Next** to proceed.

Step 2: User Information

- **Action:** Enter your information for the following fields. (You may use the Tab key to move from one field to the next. Do not use the Enter key.)
 - *First Name*
 - *Last Name*
 - *Work Address*
 - *City*
 - *State*
 - *E-mail Address*
 - *Phone Number*
- **Action:** Click **Next** to proceed, or **Back** to re-enter your account e-mail.

Step 3: HUD B or C Identification

- You will see a question:
Do you already have a HUD-issued B or C ID?

If you already have Integrated Disbursement and Information System (IDIS) access, your ID will be the letter B or C followed by 5 digits. For example, B12345 or C12345.

COMPLETING A HEROS ACCESS FORM REQUEST

- **Explanation:** Determine whether you have an existing HUD-issued B or C User ID. This may be a user ID associated with IDIS or associated with another RE or partner organization in HEROS.
- **Action:** Click the radio button (circle) next to your response.
- **Action:** Click **Next** to proceed, or **Back** to re-enter your user information.

Step 3A: Yes: HUD B or C Identification

- If you select **Yes**, you will be asked to enter your HUD B or C ID number.
- **Action:** Provide your B or C ID number in the field provided.
- **Action:** Determine whether you already have HEROS access, then click on the radio button next to your response.

The screenshot shows a form with three sections. The first section is titled 'B or C ID number: *' and contains a text input field labeled 'Your answer'. The second section is titled 'Do you already have HEROS Access? *' and contains two radio buttons: 'Yes' and 'No'. The third section contains a link for support: 'For questions regarding this form, please submit a question through Ask a Question by selecting "My question is related to Environmental Review and HEROS" - <https://www.hudexchange.info/program-support/my-question/>'. At the bottom are 'Back' and 'Next' buttons.

- **Action:** Click **Next** to proceed, or **Back** to re-enter whether you have HUD B or C identification.

Step 3B/3C: No/I don't remember my ID: HUD B or C Identification

- If you select *No* or *I don't remember my ID*, you will be asked to enter a five-digit PIN so that a new HUD B or C ID can be created for you.

You will see a prompt:
Five-digit PIN (if no B or C ID):

The screenshot shows a form with two sections. The first section is titled 'Five digit PIN (if no B or C ID): *' and contains a text input field labeled 'Your answer'. Below the input field is a small text block: 'The five-digit PIN is any 5 numbers of your own choosing and is used for setting up your initial password and if you need password resets. You may select any PIN as long as it is 5 digits long and all numerical. PINs must be a combination other than 12345.' The second section contains a link for support: 'For questions regarding this form, please submit a question through Ask a Question by selecting "My question is related to Environmental Review and HEROS" - <https://www.hudexchange.info/program-support/my-question/>'. At the bottom are 'Back' and 'Next' buttons.

The five-digit PIN is any 5 numbers of your own choosing and is used for setting up your initial password and if you need password resets. You may select any PIN as long as it is 5 digits long and all numerical. PINs must be a combination other than 12345.

- **Action:** Enter a preferred 5-digit PIN.

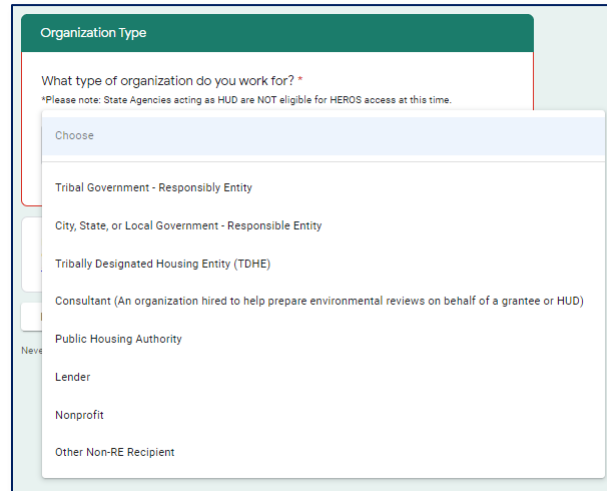
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- **Action:** Click **Next** to proceed, or **Back** to re-enter whether you have HUD B or C identification.

Step 4: Organization Type

- You will be asked:
What type of organization do you work for?

Please note: State Agencies acting as HUD are NOT eligible for HEROS access at this time.

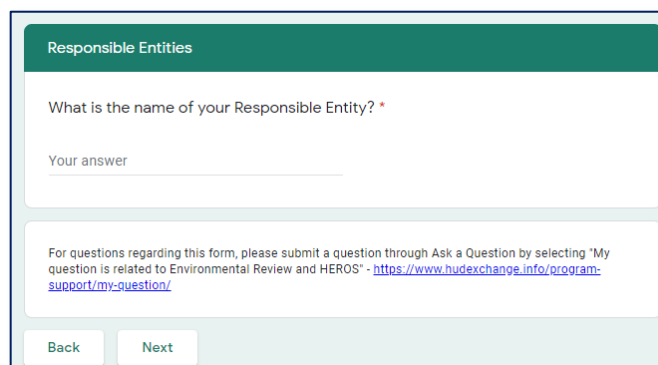
A screenshot of a web form titled "Organization Type". The question is "What type of organization do you work for? *". A note below the question states: "*Please note: State Agencies acting as HUD are NOT eligible for HEROS access at this time." Below the question is a dropdown menu with the following options: "Choose", "Tribal Government - Responsible Entity", "City, State, or Local Government - Responsible Entity", "Tribally Designated Housing Entity (TDHE)", "Consultant (An organization hired to help prepare environmental reviews on behalf of a grantee or HUD)", "Public Housing Authority", "Lender", "Nonprofit", and "Other Non-RE Recipient".

- **Action:** Select the type of organization you work for in the drop-down field.
- **Action:** Click **Next** to proceed, or **Back** to re-enter your five-digit PIN.

Step 4A-1: City, State, or Local Government—Responsible Entity

- If you choose *City, State, or Local Government—Responsible Entity*, you will be asked:
What is the name of your Responsible Entity?

- **Explanation:** This is the name of the city, state, or local government by which you are employed. If you are not employed by a government entity but prepare environmental reviews on behalf of a government entity, click the **Back** button to be taken to the previous question and select a partner organization.

A screenshot of a web form titled "Responsible Entities". The question is "What is the name of your Responsible Entity? *". Below the question is a text input field labeled "Your answer". At the bottom of the form, there is a note: "For questions regarding this form, please submit a question through Ask a Question by selecting 'My question is related to Environmental Review and HEROS' - [https://www.hudexchange.info/program-support/my-question/](\"https://www.hudexchange.info/program-support/my-question/\")". At the very bottom, there are two buttons: "Back" and "Next".

- **Action:** Enter the name of your RE in the field provided.
- **Action:** Click **Next** to proceed, or **Back** to re-select your organization type.

Step 4A-2: City, State, or Local Government—Responsible Entity

- After entering the name of your organization, you will be asked:
Do you prepare environmental reviews for your organization?

An environmental review preparer can view, edit, and create environmental reviews in HEROS.

The screenshot shows a form titled "HEROS Privileges" with two sections. The first section asks "Do you prepare environmental reviews for your organization?*" with a subtext "An environmental review preparer can view, edit, and create environmental reviews in HEROS." and radio buttons for "Yes" and "No". The second section asks "Do you approve environmental reviews for your organization?*" with a subtext "An environmental review approver has the authority to sign the environmental review record. HUD recommends but does not require that this be the Certifying Officer." and radio buttons for "Yes" and "No".

- **Action:** Click the radio button next to your response.
- The next question is:
Do you approve environmental reviews for your organization?

An environmental review approver has the authority to sign the environmental review record. HUD recommends but does not require that this be the Certifying Officer.

- **Action:** Click the radio button next to your response.

- The next question is:
Are you a Certifying Officer?

The Certifying Officer signs the Request of Funds and Certification and takes legal responsibility for the environmental review. This role may only be filled by the Certifying Officer or their designee. The Certifying Officer is not required to have access to HEROS, although they are

The screenshot shows a form with two sections. The first section asks "Are you a Certifying Officer?*" with a subtext "The Certifying Officer signs the Request for Release of Funds and Certification and takes legal responsibility for the environmental review. This role may only be filled by the Certifying Officer or their designee. The Certifying Officer is not required to have access to HEROS, although they are welcome to request access. Alternatively, the Certifying Officer may sign a hard copy of the relevant document that can then be uploaded to HEROS. Please note that if someone other than the highest level official is acting as Certifying Officer, a record of the delegation of signatory authority should be kept on file. The delegation of authority does not have to be submitted to HUD." and radio buttons for "Yes" and "No". The second section asks "Do you need HEROS Administrator privileges?*" with a subtext "HEROS Administrators have privileges to update contact information for users within their organization. They also have privileges to re-assign environmental reviews in HEROS for their organization. This person should have authorization for this privilege from the Certifying Officer. A record of the authorization should be kept in the local files. Note that an organization may appoint more than one HEROS Administrator." and radio buttons for "Yes" and "No".

welcome to request access. Alternatively, the Certifying Officer may sign a hard copy of the relevant document that can then be uploaded to HEROS. Please note that if someone other than the highest-level official is acting as Certifying Officer, a record of the delegation of signatory authority should

COMPLETING A HEROS ACCESS FORM REQUEST

be kept on file. The delegation of authority does not have to be submitted to HUD.

- **Explanation:** The Certifying Officer is the official for the RE who is authorized to execute the Request for Release of Funds and Certification, and has the legal capacity to carry out the responsibilities of [§58.13](#). This individual is typically the chief elected official of a city, state, county, or tribal government.
- **Action:** Click the radio button next to your response.
- The next question is:
Do you need HEROS Administrator privileges?

HEROS Administrators have privileges to update contact information for users within their organization. They also have privileges to re-assign environmental reviews in HEROS for their organization. This person should have authorization for this privilege from the Certifying Officer. A record of the authorization should be kept in the local files. Note that an organization may appoint more than one HEROS Administrator.

- **Action:** Click the radio button next to your response.
- **Action:** Click **Next** to proceed, or **Back** to re-select your RE organization.
Note: The next step will be Step 7.

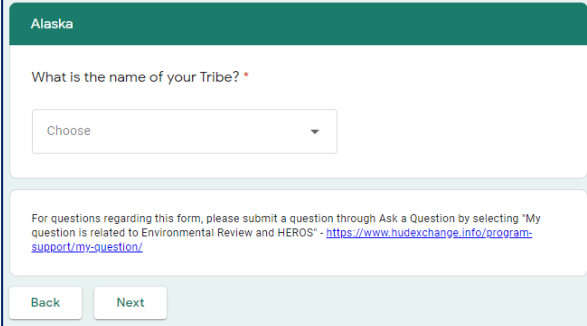
Step 4B-1: Tribal Government—Responsible Entity

- If you choose *Tribal Government—Responsible Entity*, you will be asked:
In which Region (ONAP Area Office) is your Tribe located?
- **Action:** Select the Office of Native American Programs (ONAP) Area Office in which your Tribe is located from the drop-down field.
- **Action:** Click **Next** to proceed, or **Back** to re-select your organization type.

Step 4B-2: Tribal Government—Responsible Entity

- After entering the region (ONAP Area Office) for your Tribe's location, you will be asked: *What is the name of your Tribe?*

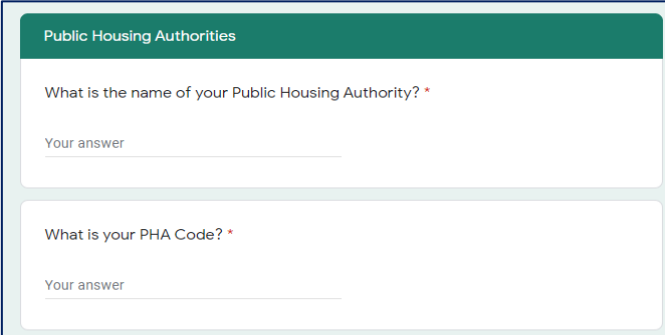
Select the name of your Tribe from the drop-down field.



The screenshot shows a web form titled "Alaska". The main question is "What is the name of your Tribe? *". Below the question is a dropdown menu with the text "Choose" and a downward arrow. At the bottom of the form, there are two buttons: "Back" and "Next". A small text box at the bottom of the form contains the following text: "For questions regarding this form, please submit a question through Ask a Question by selecting 'My question is related to Environmental Review and HEROS' - <https://www.budexchange.info/program-support/my-question/>".

- **Action:** Click **Next** to proceed, or **Back** to re-select your Tribe's region (ONAP Area Office).
- **Action:** Follow the steps in 4A-2 to set up your HEROS privileges. The next step will be Step 6A/6C-1.

Step 4C: Public Housing Authority



The screenshot shows a web form titled "Public Housing Authorities". The first question is "What is the name of your Public Housing Authority? *". Below the question is a text input field with the placeholder text "Your answer". The second question is "What is your PHA Code? *". Below the question is another text input field with the placeholder text "Your answer".

- If you choose *Public Housing Authority*, you will be asked: *What is the name of your Public Housing Authority?*
- **Action:** Enter the name of your PHA in the field provided.
- The next question is: *What is your PHA Code?*
- **Action:** Enter your PHA code in the field provided.
- **Action:** Click **Next** to proceed, or **Back** to re-select your organization type.

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Step 5: Partner Users

- The first question is:
What is the name of your organization?
- **Explanation:** This is the name of the organization or company by which you are employed. The partner organization is responsible for preparing and conducting the environmental review analysis on behalf of an RE or HUD.

Partner Users

What is the name of your organization? *

Your answer

When you are granted HEROS access, you may work on environmental reviews for a variety of HUD programs. For which HUD program do you anticipate completing your FIRST environmental review in HEROS? *

FHA Multifamily

RAD

202 Program

CDBG

HOME

SHOP/VHRM

PIH Capital Fund

Office of Native American Programs

Section 232

Other: _____

- **Action:** Enter the name of the partner organization.

- The next question is:
When you are granted HEROS access, you may work on environmental reviews for a variety of HUD programs. For which HUD program do you anticipate completing your FIRST environmental review in HEROS?

- **Action:** Click the radio button to select your answer.

- **Action:** If you select Other, proceed to the next question:
If Other, for which HUD program(s) do you anticipate completing environmental reviews in HEROS?

If "Other", for which HUD program(s) do you anticipate completing environmental reviews in HEROS?

Your answer

Who is legally responsible for and finalizes HUD environmental reviews for your organization? *

Please note, while partner users can assist with the preparation of the environmental review, only HUD or a Responsible Entity can finalize the review.

Choose

- **Action:** Enter the HUD program in the field provided.

- The next question is:
Who is legally responsible for and finalizes HUD environmental reviews for your organization?

- **Explanation:** If your partner organization prepares environmental reviews under Part 58 then you will select *A Responsible Entity*. If your organization prepares environmental reviews under Part 50, then you will select *HUD*.

- **Action:** Choose the most appropriate option from the drop-down menu.

COMPLETING A HEROS ACCESS FORM REQUEST

Please note: While partner users can assist with the preparation of the environmental review, only HUD or an RE can finalize the review.

- Click **Next** to proceed, or **Back** to re-select your organization type.

Step 6A: Part 58 Reviews

- If you select *A Responsible Entity*, you will be taken to the Part 58 page.

The first question is:
Are you an Authorized Officer for certifying the Request for Release of Funds (for non-RE recipients)?

- **Action:** Select the Yes or No radio button.
- The next question is: *What is the name of the Responsible Entity that completes your environmental reviews?*

Part 58 Reviews

Are you an Authorized Officer for certifying the Request for Release of Funds (for non-RE recipients)? *

Yes

No

What is the name of the Responsible Entity that completes your environmental reviews? *

The Responsible Entity is the unit of general local, state, or tribal government that is legally responsible for completing the environmental review (i.e. the City of Los Angeles). If your organization works with multiple REs, please submit a separate online form for each RE.

Your answer _____

Is the Responsible Entity for your environmental reviews a Tribe? *

Yes

No

The Responsible Entity is the unit of general local, state, or tribal government that is legally responsible for completing the environmental review (i.e. the City of Los Angeles). If your organization works with multiple REs, please submit a separate online form for each RE.

- **Action:** Enter your response in the field provided.
- The next question is:
Is the Responsible Entity for your environmental reviews a Tribe?
- **Action:** Select the Yes or No radio button.
- **Action:** Click **Next** to proceed, or **Back** to re-select your partner user information.

Step 6B: Part 50 Reviews

- If you select HUD, you will be taken to the Part 50 page. You will be asked:
What is the name of your HUD contact for environmental reviews?

COMPLETING A HEROS ACCESS FORM REQUEST

The HUD contact is the HUD staff assigned to your environmental review and receives all environmental review documents. Examples: CPD Rep, Underwriter, Appraiser, Transaction Manager, or PIH Field Office Engineer.

- **Explanation:** Be sure to provide the name of a specific HUD employee. If you are unsure of the specific HUD employee, you can indicate a title/program office.
- **Action:** Enter your response in the field provided.
- **Action:** Click **Next** to proceed, or **Back** to re-select your partner user information.

The screenshot shows a form titled "Part 50 Reviews". The main question is "What is the name of your HUD contact for environmental reviews? *". Below the question is a text box labeled "Your answer". A smaller text box below that contains the same explanatory text as the main text block: "The HUD contact is the HUD staff assigned to your environmental review and receives all environmental review documents. Examples: CPD Rep, Underwriter, Appraiser, Transaction Manager, or PIH Field Office Engineer." At the bottom of the form, there are two buttons: "Back" and "Next".

Step 6C: Part 50 and Part 58

- If you select *Both*, you will be taken to the Part 50 and Part 58 page.
- Read the following question:
What is the name of your HUD contact for environmental reviews?

The HUD contact is the HUD staff assigned to your environmental review and receives all environmental review documents. Examples: CPD Rep, Underwriter, Transaction Manager, or Engineer.

- **Explanation:** Be sure to provide the name of a specific HUD employee. If you are unsure of the specific HUD employee, you can indicate a title/program office.
- **Action:** Enter your response in the field provided.

The screenshot shows a form titled "Part 50 and Part 58". It contains two questions. The first question is "What is the name of your HUD contact for environmental reviews? *", with a text box labeled "Your answer" below it. The second question is "What is the name of the Responsible Entity who completes your environmental reviews? *", with a text box labeled "Your answer" below it. Both questions have explanatory text below them. The first question's text is: "The HUD contact is the HUD staff assigned to your environmental review and receives all environmental review documents. Examples: CPD Rep, Underwriter, Transaction Manager, or Engineer." The second question's text is: "The Responsible Entity is the unit of general local, state, or tribal government that is legally responsible for completing the environmental review. If your organization works with multiple REs, please submit a separate online form for each RE."

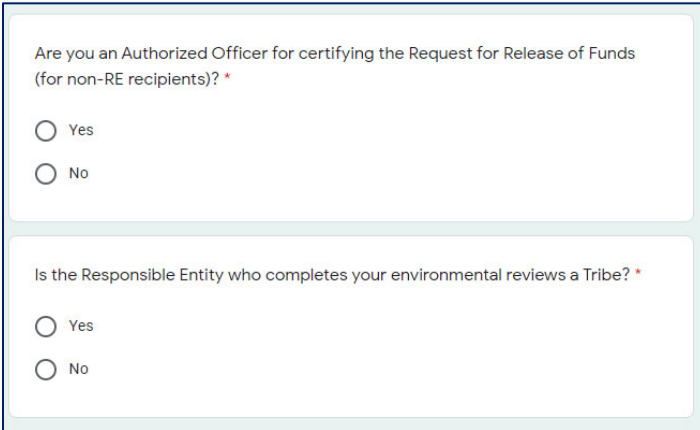
COMPLETING A HEROS ACCESS FORM REQUEST

- Read the following question:
What is the name of the Responsible Entity who completes your environmental reviews?

The Responsible Entity is the unit of general local, state, or tribal government that is legally responsible for completing the environmental review. If your organization works with multiple REs, please submit a separate online form for each RE.

- **Action:** Enter your response in the field provided. You only need to enter the name of the organization, not the name of a specific individual who works for the RE.

- **Action:** Determine whether you are an Authorized Officer for certifying the Request for Release of Funds (for non-RE recipients). Click the radio button next to your response.



The screenshot shows a form with two sections, each containing a question and two radio button options. The first section asks, "Are you an Authorized Officer for certifying the Request for Release of Funds (for non-RE recipients)? *", with "Yes" and "No" options. The second section asks, "Is the Responsible Entity who completes your environmental reviews a Tribe? *", also with "Yes" and "No" options.

- You will be asked: *Is the Responsible Entity who completes your environmental reviews a Tribe?*

- **Action:** Click the radio button next to your response.

- **Action:** Click **Next** to proceed, or **Back** to re-enter your partner user information.

COMPLETING A HEROS ACCESS FORM REQUEST

Step 6A/6C-1: Tribal Government—Responsible Entity

HEROS Access Form
* Required

Tribes

In which Region (ONAP Area Office) is the Tribe acting as your Responsible Entity located? *

Choose

For questions regarding this form, please submit a question through Ask a Question by selecting "My question is related to Environmental Review and HEROS" - <https://www.hudexchange.info/organization-support/my-question/>

Back Next

- If you selected *Yes* to the question *Is the Responsible Entity who completes your environmental reviews a Tribe?* you will be asked: *In which Region (ONAP Area Office) is your Tribe located?*
- **Action:** Select the ONAP Area Office in which your Tribe is located from the drop-down field.

- **Action:** Click **Next** to proceed, or **Back** to re-select your organization type.

Step 6A/6C-2: Tribal Government—Responsible Entity

HEROS Access Form
* Required

Alaska

What is the name of your Tribe? *

Choose

For questions regarding this form, please submit a question through Ask a Question by selecting "My question is related to Environmental Review and HEROS" - <https://www.hudexchange.info/organization-support/my-question/>

Back Next

- After entering the region (ONAP Area Office) in which your Tribe is located, you will be asked: *What is the name of your Tribe?*
- **Action:** Select the name of your Tribe from the drop-down field.
- **Action:** Click **Next** to proceed, or **Back** to re-select your Tribe's region (ONAP Area Office).

Step 7: Submit Form

HEROS Access Form

Click submit to finish.

Back Submit

- You have now entered all the required information to complete your HEROS Access Form.
- **Action:** Click **Back** to change any answers as necessary or **Submit** to send your request.

HEROS Access Form: Additional Resources

For more information about using HEROS for RE users, review the [HEROS User Guide](#).

For more information about using HEROS for third-party consultants, PHAs, and other non-RE recipients assisting with the preparation of Part 58 environmental reviews, please see the [Partner User Role for Part 58 User Guide](#).

For more information about using HEROS for Part 50 consultants and lenders assisting HUD program staff with the preparation of Part 50 environmental reviews, please see the following resources:

- [HEROS Guidance for Office of Residential Care Facilities \(ORCF\) Partners](#) (i.e., consultants or lenders assisting with environmental reviews for the ORCF, Section 232 Federal Housing Administration [FHA]-insured projects.)
- [HEROS Guidance for Multifamily FHA Partners](#)
- [HEROS Guidance for Rental Assistance Demonstration \(RAD\) Partners](#)