

## Transcript for the HEROS Frequently Asked Questions Webinar on 08/06/2020

Operator: We'll give it about a minute more for some more participants to join and then we will go ahead and start today's session.

Ben Sturm: Hello. Good afternoon, everyone. Thank you for joining us for today's webinar on HEROS Frequently Asked Questions. My name is Ben Sturm, and I work with the Cloudburst Group. Before we get started, I would like to share a couple of housekeeping notes regarding today's session. This webinar is scheduled for 60 minutes; however, there is a chance that the session could run longer if needed. We are also expecting a large number of you in attendance, so all lines are muted. This session will be recorded, the recording and the PowerPoint slides will be made available on HUD Exchange within the next week.

If you look at your Webex control panel on the right-hand side of your screen, please take note of the following.

- Computer audio: if you would like to change your audio settings from phone to computer please be sure to click on the Quick Start menu on the top left of your Webex screen and then go to the audio conference section. Switch the selection from Phone to Audio Computer or to Computer Audio.
- The chat pod: by default, the chat pod is set to host please use the drop-down arrow to select the Presenter/Panelist Host option.
- The Q&A pod: all questions should be submitted through the question pod; by default, this pod is not automatically selected so please now take the time to locate and click the Q&A pod so that it is added to your screen. The Q&A icon should be located within your control panel at the top right-hand side of your screen. We will be stopping throughout today's session to answer questions that are submitted through the Q&A pod, so please submit your questions as you're thinking about them and we'll respond to them when appropriate. If we're not able to get to your question today you can go ahead and submit it through the HUD Exchange Ask-A-Question for HEROS. If you are having technical issues related to audio or screen sharing, please also submit those questions through the Q&A pod on the control panel.

Joining me today is Lauren Hayes Knutson, Sean Joyner, and Kathy McNulty from the Office of Environment and Energy. With that said, I am pleased to turn this presentation over to Sean Joyner.

Sean Joyner: Good afternoon, everyone. Thank you for joining today's session on HEROS Frequently Asked Questions. So, today's objectives will be to provide an opportunity for HEROS users to provide some interactions and to test their knowledge with HUD staff of certain HEROS topic areas. We will also

provide updates to HEROS users on system features, resource tools, and some issues that affect HEROS as well.

So, the agenda today, we're going to go over tools and resources which I'll be covering; and then Lauren Hayes Knutson will be providing updates to HEROS and troubleshooting and also going over some FAQs by category, which includes some of the user roles, some of the user privileges, and the partner user roles which you're probably familiar with. And there may be an introduction to some troubleshooting issues as well, and then there'll be a Q&A session at the end.

Alright. So, now for tools and resources. There are some quick tools that you can use if you're new to HEROS, there's a HEROS user guide located on the HUD Exchange, and there are also some HEROS quick guides that can answer some of your basic questions on how to utilize HEROS and some of the screens to enter the environmental review as you move through other different screens. There are also some helpful how-to videos on the HUD Exchange and they include some great topics like "How to begin a HERO review," also performing environmental reviews, "How to perform peer reviews," and more.

There's also a Frequently Asked Questions page on the HUD Exchange where you may want to check first before you use Ask A Question (AAQ); you may want to go here first where you can check out some of the frequently asked questions that we get from multiple HEROS users.

So, it may reduce the number of questions you submit to AAQ.

And then here's the HUD Exchange Ask-A-Question, here's where you will go to submit your question if you have a HEROS-related issue such as how to use a certain screen or what point of contact is if you're not familiar with your regional environmental officer or environmental officer, or if you have a troubleshooting question, or if you need access to HEROS also, this is where you would submit those questions.

And then for feedback on HEROS, please visit the AAQ as well and also the FAQs if something is not working—if you're having issues uploading supporting documentation, or screens are not advancing where you believe they should work—please feel free to submit an AAQ as well.

And with that said, I'll turn it over to my colleague, Lauren Hayes Knutson, for updates and reminders.

Lauren Knutson: Thanks, Sean. And if you can make me the presenter that would be great, I think you just right click on my name. Perfect. Thank you.

Alright, so I just have a few updates and reminders for HEROS to go over. So, first the HEROS 11.20 release is the next release coming out with system fixes and updates and it is going live the beginning of September, so very soon. And there are some important fixes coming out in this release including fixing saving issues on the EA Factor screen and fixing issues with deleting and editing site-specific or Tier 2 reviews--or tiered reviews in the system--and also a fix for replacing special characters that are incompatible with the system and have caused some copy-paste issues and some saving issues. So, those fixes are coming very soon.

Also coming soon is a HEROS' troubleshooting guide that will expand on some of the troubleshooting topics we'll cover today and go over workarounds for any issues that'll be ongoing in the system or issues you may encounter when using the system. Also, a user access quick guide that will go into detail on how to fill out the HEROS access form online for requesting access to HEROS and then also a video on how to do this access form. So, we'll have some good resources coming out particularly for those requesting access to HEROS. So, if you are a responsible entity user and you know that you'll have consultants or partners trying to access the system, these will be very helpful tools.

Also, just something to note that we added recently in HEROS, is the CARES Act program, so they've all been added to HEROS under the Funding Sources. So, if you plan to use HEROS for any of the CARES Act programs including CDBG-CV, ESG-CV, TOPOS-CV, ICDBG, and IHCG CARES programs, you can now select those as funding sources in the system, and then we also added the Veterans Housing Rehabilitation and Modification Pilot Program and the CDBG net program, so those are now available in the system.

And then finally, this is unrelated to HEROS, but since this is the world we're living in now, we have a whole list of COVID response guidance and resources on the HUD Exchange as well, particularly in times where we may not be in the office and we're teleworking, there are some resources on how to complete the environmental review process. And HEROS, I think, is a very good tool for that at this time.

So, now, we're going to switch gears a little bit and go over some HEROS FAQs, but in more of a quiz format. So, I'll read out some FAQ questions that we receive a lot and then you can select the answer in the poll question that'll pop up on your screen. It's fine if you don't know the answer, just give it your best guess and we'll go over the answers. This is just to help participants get a little more involved and to test your knowledge of the HEROS system and hopefully answer some questions along the way.

So, let me pull up the poll. So, the first category is on user access, so just a refresher on registering for HEROS. HEROS is currently available for

responsible entities and partner users in all regions and the electronic HEROS access form must be completed for new users seeking access to HEROS, existing users that need access to a different organization or profile if you work for a different organization now, or existing users that have had their previous accounts deleted or deactivated; if you left the organization and came back, for instance, you would also fill out the HEROS access form.

So, now we'll jump into the first full question. This should be a pretty easy one, but we'll pull it up.

1. The first question is: how do responsible entities and partner users register for HEROS?
  - a. Submit an AAQ;
  - b. Email HEROSInfo;
  - c. Contact your field environmental officer; or
  - d. Complete the HEROS access form.

We'll give you a few more seconds to vote. We have a lot of answers in. So, we got a lot of answers in. So, I think this one's straightforward.

The answer here is D. Users used to request access via the HEROSInfo account, but we have since retired this email account. HEROSInfo should no longer be used for access requests or for technical assistance. You can now only request access using the HEROS access form online, and there's a link to that on the HEROS HUD Exchange.

2. Next question: who do I contact for a password reset?
  - a. Email HEROSInfo;
  - b. Submit an AAQ;
  - c. Email the HEROS team; or
  - d. Contact the HITS National Help Desk.

Go ahead and submit your poll. So, we got split answers on this one. But here, the answer is D: contact the HITS National Help Desk. Unfortunately, OEE staff and our contractors do not have the ability to reset passwords for HEROS; it can only be done by HUD IT Security. So, you'll need to contact the HITS National Help Desk and provide your BID number and make sure to specify the HEROS environment for which you're requesting access. So, either production or training environment.

Sorry, there's a lag time when I close the polls. I will try to do that sooner for the next one.

3. So, our next question on user access is: what is needed in order to reset my HEROS password?
  - a. The email address;
  - b. HEROS BID user ID;

- c. Our organization name, or
- d. The five-digit verification pin.

I've got about the majority of responses in. So, here, the answer is D. So, in addition to providing your BID number, you'll also need to provide your five-digit verification pin. So, if you're a new user requesting HEROS access, you'll provide this five-digit pin on the HEROS access form when you submit it; and if you already have IDIS access, your pin is the same one that you provided to register for IDIS. So, you would submit that when prompted by the Help Desk. But please reach out to us if you don't remember your pin and we can provide it to you.

4. Alright. Next question on user access is: I have an active HEROS account, but I recently began working for a new organization, how can I access my new profile on HEROS?
- a. Contact my local HEROS administrator to update my account;
  - b. Complete a new HEROS access form;
  - c. Submit an AAQ to HUD Exchange Ask-A-Question; or
  - d. Submit an email to my HUD FEO or REO.

Again, I'll give it a few seconds for folks to answer. So, it looks like most folks have the right answer here. It is B: complete a new HEROS access form. So, if you already have an account in HEROS that you now need access under a new REO or partner organization, please submit a new HEROS Access Form with information for your new account so we know how to set up your privileges appropriately. And please provide your existing user ID to set up your account under the same profile, and then let us know so that we can deactivate it in the system.

Next question. We'll switch over to the User Role/Privileges category.

5. Next one is: I'm trying to create an environmental review and the system is not allowing me to select Part 58. What should I do?
- a. Contact my local HEROS admin to update my account;
  - b. Complete a new HEROS Access Form;
  - c. Submit an AAQ; or
  - d. Submit an email to my HUD field or regional environmental officer?

Okay. It looks like most people are getting this one correct too. So, the answer here is C: submit an AAQ to HUD Exchange. So, this issue, if you're not able to select Part 58, probably means that your privileges were not set up correctly in the system and this could be an error on our end, the way we set up your profile or it could be an error when you filled out the access form or it was filled out incorrectly. So, please send in an AAQ if you run into this issue and we will correct your privileges.

6. Next question. As the local HEROS administrator for my jurisdiction, can I delete users no longer employed with the RE?
  - a. Yes, of course;
  - b. No, contact your HUD field or regional environmental officer;
  - c. No, submit an AAQ; or
  - d. Yes, contact HITS National Help Desk.

This one's kind of tricky, we have mixed responses for this. Okay, so responses across the board. But the answer here is C: submit an AAQ. So, local administrators do have admin privileges to change contact information for members of their organization and to reassign reviews within their organization; but local admins cannot change HEROS privileges, only HEROS admins can do that. So, that's generally just OEE staff. So, if privileges need to be changed or if the user profile needs to be deactivated, please submit an AAQ request and we can make that change.

7. Next question on the user role: Is the certifying officer required to have HEROS access?
  - a. Yes;
  - b. No; or
  - c. It's recommended, but not required.

Okay, looks like most people got this one. So, the answer is C. We do recommend that certifying officers obtain access to HEROS, particularly as we move to remote working environments and as HEROS moves closer to becoming mandatory. However, there's always the option to upload a signed Request Release of Funds form to HEROS, which means that the certifying officer does not need access to the system. And I think it can be difficult for a lot of local governments to have their mayor or senior official request access to HEROS. So, it's signed if the requesters of funds are uploaded as opposed to completed within the system.

So, the answer here is no, they're not required but we do recommend it.

8. Next question on user roles: I was assigned a review to sign but HEROS won't allow me to certify it. How do I fix this?
  - a. Update user privileges;
  - b. Make sure you're not in "View Only" mode;
  - c. Check your internet browser settings; or
  - d. All of the above.

Okay, looks like we have about half the answers in and most people selected the correct answer which is D. So, this is, unfortunately, an issue that can have several potential causes, so you may need to check various places to solve this issue.

So, it's possible that it could be a privilege issue, but there are other possibilities that should be looked into prior to checking user privileges. First, an easy check, just make sure you open the review in the appropriate mode. HEROS users sometimes will accidentally open a review in "View Only" mode without realizing it, and so from the environmental review dashboard when you select the radio button next to the review, make sure you choose the correct button, edit the selected environmental review, or if you're an authorizing officer signing an authority to use grant funds, you can select "Edit 7015.15."

Then if you can edit some fields within your certification, but not others, this could be a browser issue. So, HEROS is incompatible with Google Chrome for some features; so, in most cases, this issue is resolved by switching to Internet Explorer which is HUD's "official browser." So, we always recommend using Internet Explorer to make sure all HEROS functions are working correctly.

And then finally, if these fixes don't work, then we can check your system privileges. So, there are three certifications in HEROS that could require that you require special privileges and that's the certifying officer RROF, the authorizing officer certifying the authority to use grant funds, or the environmental clearance officer certifying Part 50 reviews.

So, if you think you're missing one of the required privileges, please request assistance via AAQ and we can look at your privileges. And then as a reminder, these certification privileges would only apply to RE or HUD users and partner users cannot access the certification screen.

So, now we'll move into questions about the Partner User Role.

9. So, the first question is: what type of consultants are currently allowed HEROS access?
  - a. RAD consultants and consultants acting as HUD or RE staff;
  - b. Consultants for a nonprofit or a PHA;
  - c. Environmental contractors called on when needed; or
  - d. All of the above.

It looks like most people are right on this one, so the answer is actually D: all of the above. So, HEROS was updated in 2017 to incorporate new user functionalities for partner users. So, partners include consultants, contractors, as well as non-RE recipients like nonprofits and public housing authorities, and we've completed--or almost completed--a more formal rollout for CPD partner users including consultants and we'll be wrapping up that push with Region 6 this month. We have not done a formal service training for Public Housing Authority users or for Tribally Designated Housing entities, but PHAs and TDHGs are still welcome to register for HEROS if they want to use the system. But PHAs and all non-RE recipients who register will just

need to make sure that the appropriate RE or HUD users have access to the system to certify the reviews.

Next question on the partner user role. Sorry, some background on partner users, first. Sorry about that. So, just as a reminder--I just went over this--but partners include PHAs, third-party consultants, contractors, nonprofits, applicants, lenders and other non-RE recipients.

So, as a partner user, you have to be associated with a responsible entity, or with HUD if it's under Part 50, to log into the system. So, when you log in, you select your partner organization such as a consulting group, and then select the drop-down below it to choose either the RE you're associated with or HUD. And we set up these privileges when you request access for HEROS, and so that information would be provided in the HEROS access form.

Okay, more questions on partner user roles.

10. So, the next question is: as a partner user, can I select the determination for Related Laws and Authorities? Yes or No.

So, this is the compliance determination question for each of the laws and authorities asking if mitigation or compliance measures are required.

Okay, this one's got a mix of results too, this is a good question. So, the answer here is No. HUD's regulations require that only HUD or a RE can determine if mitigation or compliance factors are required for the laws and authorities. So, in HEROS, this means that the final Yes/No question about compliance factors on the law's authority screen cannot be selected by partner users. Partners can make recommendations to the RE or HUD in the compliance determination box, but they cannot make the final selection.

I have a screenshot. So, I don't know if you can see that very well, but partners do not have the privileges to respond to that final Yes/No question on the screen. So, they should make that determination or recommendation in the text box above it. But only the RE HUD can select that Yes/No question in HEROS.

And then depending on user privileges, partner users can only enter information up to a point in their review but then they see this screen, they can't proceed past this point, partner users cannot access any of the certification screens and we'll need to assign the review to the RE or to HUD at this point.

Okay, we have one more question on the partner user role.



11. So, the next question is: as a partner user, how can I add a site-specific or Tier 2 environmental review in HEROS?
- a. Click the Upload button on Screen 1240 Site-Specific Projects;
  - b. Create a new Tiered review;
  - c. Submit an AAQ to HUD Exchange and request privileges be updated; or
  - d. Complete the Site-Specific review outside of HEROS and email to the RE to add in the system.

Okay, we've got mixed responses on this one too. Okay, so the answer here is D: complete the Site-Specific review outside of HEROS. So, partner users cannot upload site-specific reviews to a shared review; partners can provide a Word document with the specific information as well as the supporting documentation, but a Tier 2 must be reviewed by the RE, so they need to look at it first, so then the RE will review it and upload the review into the broad-level review in HEROS.

So, now we'll move into the troubleshooting category which is probably our biggest category. We want to help if people run into any issues in the system.

12. So, the first question is: what's the first thing I should do if I'm using HEROS and something doesn't work?
- a. Contact your field environmental officer;
  - b. Submit a question to AAQ;
  - c. Check the HEROS FAQ; or
  - d. Email HEROSInfo.

This one's a little easier, it looks like most people knew this one. The answer here is C: check the HEROS FAQs. Definitely check the FAQs first—it's a good place to check for common issues and we try to keep them updated. But if that does not resolve your issue, then you can move on to submitting an AAQ.

13. Next question is a true-or-false: Typing text into HEROS counts as being active in the system and will prevent you from timing out. True or False.

I'll give a few more seconds for folks to answer. This one is split about even. I think I stumped you on this one. The answer here is false. So, because of HUD's IT security protocols, users are usually logged out after 20 minutes of inactivity, and you'll be given a three-minute warning after 17 minutes. And at this point, you should definitely make sure to save your work to make sure any of the work in progress is not lost.

Some actions within a screen may reset the clock on the 20 minutes without pressing the "Save and Continue" button, however, we recommend pressing "Save" or "Save and Continue" regularly to avoid losing your work. This is kind of the trigger to write information to the database or to the server which

resets the clock and shows that you're being active in the system. And this is particularly important when you're working on longer screens with longer narrative text boxes such as the environmental assessment factors screen. But unfortunately, typing in a text box does not count as being active in the system. So, make sure to save frequently when you're typing in text boxes in HEROS.

14. Next question: why can't I find a project on the "My Environmental Reviews" dashboard?

- a. The review is assigned to another user but your dashboard is set to "Show Reviews Assigned to Me";
- b. The project is a Tiered Review;
- c. You entered a search criterion that filtered your results; or
- d. All of the above.

Okay. Looks like people knew this one. This is pretty good. Most people guessed D, the correct answer. So, remember in HEROS, the default dashboard when you log in is the "Show Reviews Assigned to Me" dashboard. If you're looking for a review that is not currently assigned to you, you'll need to select the "Show All" radio button; and if you're looking for a tiered review, you'll need to select the "Go to Tiered Reviews" button to go to the Tiered Review dashboard, and it looks almost identical to the default dashboard, it's just the tiered reviews are located in a separate screen.

Or a search criterion could be misspelled or inaccurate, so you should try filtering maybe by city, or state, or level of review instead of, for example, project name, which could be spelled incorrectly or something.

15. Next troubleshooting question is: after each attempt to upload a document, the final attachment does not appear. Did my document upload in the system?

- a. Yes, but it will only appear after generating the environmental review record;
- b. No, the document did not upload and it's likely due to an internal network issue;
- c. No, the folder the file being uploaded from contains an apostrophe in the folder name; or
- d. Both B and C.

This may be a tricky one. Okay. It looks like most people got this one correct. The answer here is D: both B and C. So, there could be a couple reasons causing this issue. Note that only one document can be uploaded at a time in HEROS, so don't try to upload multiple. Also, the system will prevent the upload of any documents that contain special characters or symbols in the file name including apostrophes and including things like commas or extra periods besides the file extension, like ".pdf".

And the system will show an error message if you try to upload files with special characters in the file name, but just be aware that you won't be able to upload these kinds of files. We recommend using Internet Explorer and deleting your browsing history before attempting to upload the document again just to make sure it goes through.

You may also see upload issues if you're uploading from an external USB drive particularly while in VPN. Most times, local IT policy won't allow this. Or it could be a hard drive issue. Try uploading from a different folder and see if that works. And then if you're still unable to attach documents, the issue may be a conflict with your network settings and you need to work with your local IT department to see if there's a network setting or firewall issue preventing you from uploading documents from your computer.

16. Next question: Every time I enter information on Screen 4010, the Environmental Assessment Factor Summary, the page does not save the narratives entered in the text boxes. What can I do to prevent this?
- a. Absolutely nothing;
  - b. Start a new environmental assessment;
  - c. Use Internet Explorer, do not copy/paste directly into the text box and click the "Save and Continue" button; or
  - d. Use Google Chrome or Firefox.

It looks like most people got this one correct. So, the answer here is C. So, this is a known issue with text not saving on the EA Factor screen, and the good news is that we are fixing this issue in the next release in September, so it will be fixed very soon. But in the meantime, there is a workaround. So, this issue usually happens when copying and pasting text directly from a Word document or other sources directly into the narrative boxes.

So, as an immediate fix, you should first be sure to click the "Save and Continue" button instead of just the "Save" one; we'll be fixing the same buttons in the new release as well, but until then, the "Save and Continue" button is the one that's going to write this information to the server.

Then, as an additional step, you can copy and paste not directly into HEROS, but first into a text file like Notepad in Windows, for example, and that will deal with kind of the HTML errors that are happening with the copy and paste. Then, paste from the text file into the HEROS screen instead of copy and pasting directly from Word. So, it's a little bit of a complicated workaround.

So, you can do that or, as an alternative, you can just upload the EA Factors as an attachment and indicate in the text box that you're uploading the bulk of it as an attachment. And that is also a fine workaround for now until September when the screen will be fixed. So, we know this can be a frustrating bug, but it will be fixed very soon.

17. Okay, another troubleshooting question: I keep getting stuck on the Notice of Intent to Request Release of Funds screen after clicking the “Save and Continue” button and the system does not save the page. How do I proceed?
- a. Use Google Chrome;
  - b. Continue to the next screen by selecting the 7015.15 link on the side menu;
  - c. If originally using Google Chrome, switch to Internet Explorer; or
  - d. Create a new environmental review.

So, this one's a little tricky, it's kind of a newer bug for the workaround. So, the answer here is B. This is a known issue in the HEROS system that often occurs if the review is created in Google Chrome initially; but switching to Internet Explorer once the review was created in Chrome, unfortunately, won't resolve the issue. So, here, you can just continue to the next screen using the side menu and select the Request Releases Funds.

And although, this will not save the NOI-RROF screen, it will allow you to continue with the completion of your environmental review. And you can just provide the information on the NOI-RROF screen in a separate document and upload it as an additional attachment on the RROF screen, that's fine as a workaround. And remember to make sure to use Internet Explorer for HEROS moving forward.

I have a few more questions on troubleshooting.

18. The next one is: I received an "Error Code 5000504" message and cannot open the uploaded files in HEROS. What should I do?
- a. Use Internet Explorer;
  - b. The original environmental review preparer must remove and re-upload the file;
  - c. Check to see if any hidden characters are in the file name; or
  - d. Submit a request for the HEROS programmers to fix the file.

This is a newer issue too—we'll give folks a few seconds to respond—but an important troubleshooting one. Okay. So, we've got a mix of answers here too. So, the answer here is B: the original environmental review preparer must remove and re-upload the file. Unfortunately, this error message indicates that the file is not physically saved to the system server, so even though the file appears to be uploaded, its contents are missing and cannot be retrieved. So, the only solution here is for the original preparer and the owner of the files to delete the file and then re-upload the attachment.

We've since corrected most of the issues that were causing files to improperly save, so hopefully, we won't be running into this error message as frequently. But in case you do see it, it will need to go—the review will need to be assigned back to the original preparer to correct the issue.

19. Next question: I attempted to generate the Microsoft Word Environmental Review Record from the final screen but the download starts at 2 percent and then immediately goes to 100 percent with the error message, "Error! Your document could not be downloaded." So, what to do in this situation?
- a. Remove the HTML junk caused by copying and pasting directly from Word;
  - b. Use Internet Explorer;
  - c. Try downloading the document again; or
  - d. Create a new environmental review.

Okay, there's a mix of responses here too. So, the answer for this one is A. This error message occurs due to data issues resulting when text is copied and pasted from Word or a PDF. So, this HTML junk can be added to the text when the copying and pasting occurred even though it might not show up on the screen.

So, this is similar to the copy and paste issue on the EA Factor screen. So, like the EA Factor screen workaround, you should copy and paste text into a plain text editor like Notepad and then copy from there into the HEROS field which will clean the text. And then you'd click "Save and Continue" after fixing it and then generate the environmental review record again from the package screen.

So, again, this copy and paste issue should be fixed in the upcoming release, but until then, the workaround is either to paste from a plain text editor like Notepad or upload if you're running into issues on a certain screen.

20. Next one: On Screen 1240, Site-Specific Tiered Reviews, the wrong state is appearing for my project location and file attachments automatically appear as soon as you add a new site-specific project. Should you:
- a. Try creating a new project using Internet Explorer;
  - b. Only upload one project at a time;
  - c. Delete the browser history, clear the cache, and try again; or
  - d. Submit an AAQ for the screen to be fixed by HEROS programmers?

Okay, this might have been a little tricky. We have a range of responses on this one. But the answer here is D: submit an AAQ. So, this issue can be avoided only by using Internet Explorer. Once the issue occurs, switching to Internet Explorer or deleting the browsing history won't resolve the problem, and it can sometimes happen from somebody else using Chrome and then corrupting a random different tiered review. So, this is very problematic and if this happens the HEROS programmers will need to fix the screen in the back end of the system. So, as soon as you notice discrepancies on Tier 2 reviews such as incorrect states or random file attachments appearing or projects disappearing, please submit an AAQ. The good news is that we will

also be fixing this issue in the next HEROS release in September, so this will be resolved very soon. But until then, please notify us via AAQ if you run into any issues with site-specific reviews.

21. Next question: I'm having trouble assigning my reviews to the responsible entity. I get an error message saying to report this to system administrator, what should I do?
- a. Assign directly to HUD;
  - b. Just go ahead and complete the review;
  - c. Generate the Environmental Review Record and send a paper copy to the RE; or
  - d. Select the review and click the Assign Review on My Environmental Reviews dashboard, then search and select the desired user on the Assign Review screen.

It looks like most people got this one. So, the answer here is D. Users sometimes run into issues on the assigned screen when they try to assign a review and haven't clicked on the assignee's name in the search results. So, you have to make sure that you're selecting that name in the search results, it will be highlighted gray, before you click "Assign."

State privileges can also sometimes cause assign issues. So, if you search for the desired assignee and there are no results, you should submit an AAQ and then we can check to make sure the assignee has privileges in the state where the review is located. And missing state privileges like this will prevent the assignee from showing up in the search. But the first check is to make sure that you've selected the user before clicking "Assign" on the Assign Review screen.

I think we have four more questions before we open it up. We have one question on starting a review.

22. The next question is True or False: I cannot select more than one HUD program source in the HUD Funding Chart.

Okay. Looks like most people knew this one as well. So, that's false and you can always enter more than one HUD funding source on the initial screen in HEROS. So, you'd select the HUD program like CPD, Public Housing, RAD Housing, or other from the drop-down menu and on the corresponding program name.

And then to add funding sources, you can click "Add Another Funding Source," or you can delete a funding source by clicking the red "X" to the right of the funding amount. And, as I mentioned before, we've recently added the CARES Act programs to HEROS, so you can now use the system to enter reviews under those programs as well.

Okay, then we have just a couple questions on completing reviews.

23. So, the next question is: When is your 7015.15 or Request Release of Funds submitted to HUD?
- a. Immediately after clicking the "Upload" button to attach the 7015.15 paper version;
  - b. After sending an email to your HUD rep outside of HEROS;
  - c. After clicking the "Assign Review" button and selecting your HUD rep in HEROS; or
  - d. All of the above.

This one might be a little tricky. So, it looks like this one's evenly split between C and D—which are good guesses. The answer here is C. So, when you're ready to submit the 7015.15 to HUD, you'll assign the review to your HUD representative using the Assigned screen. Then on the Assigned screen, there's a checkbox indicating that this assignment represents the submission of the 7015.15 to HUD, and once you select this checkbox and assign the review, the 7015.15 is date-stamped in the system as being submitted on that date.

So, really, it's the Assigned screen that counts as the official submission and that's the date that we track in HEROS.

24. Next question: The 15-day HUD objection period is over, but I've not received the authority to use grant funds. Should I:
- a. Submit the RROF to HUD;
  - b. Mark the review complete; or
  - c. Follow up with my HUD contact via phone or email about the status of the AUGF?

It looks like people knew this one. That's good. The answer here is C. So, sometimes HUD approvers may miss the HEROS assign email indicating that the 7015.15 has been submitted or sometimes they may be out of office. So, you should definitely follow up with your HUD contact outside the system to ask about the status of the AUGF. Sean also sends out a Request Release of Funds report every week with the reviews with expired objection periods that are missing in AUGF, so this report should hopefully help remind HUD staff to get their approvals entered into the system and assign the reviews back to the preparers.

Okay, I believe this is our last quiz question.

25. The last one is: How long is my non-tiered environmental review record archived on the HUD Exchange:
- a. 10 years;
  - b. 1 year;
  - c. 6 months; or

d. 5 years?

This one's a little tricky, I may have thrown you off when I said "non-tiered." So, the answer here is B: one year. So, when I say "non-tiered," I just mean standard reviews that are not completed under the Tiered Reviews dashboard.

So, for standard reviews, after one year, the environmental review records will be removed from the HUD Exchange, but they will stay on file in the HERO system indefinitely. So, if you need to refer to an old review or reevaluated review, you can always open the review from the HEROS dashboard and then you can—if you do make changes or if you reevaluate—you can archive it again and it'll get posted for another year.

Okay. So, that was all my FAQ quiz questions. But now we can turn it over to Kathy if there are any questions in the question pod. And we only have a couple minutes left, so maybe we can do five minutes of questions, try to get in as many as we can.

I can pull up the questions if you can see them.

Kathy McNulty: Yeah, I saw them through the entire presentation at this point.

Lauren Knutson: Let me pull up the Q&As and see how many can get through.

1. So, the first one is: Are there limits on which documents cannot be signed electronically? Can all documents be signed electronically?

That's a good question. So, when using HEROS, we've basically built in these electronic certifications into the system. So, either the Request Release of Funds will be uploaded, and it's signed on paper, and then the Authority to Use Grant Funds is just certified in the system. But we do have guidance that while we're working remotely, the Request Release of Funds can be signed electronically. So, it can be signed electronically by the certifying officer and then upload it into HEROS.

Kathy McNulty: So, Lauren, I can see the questions now. So, I'm going to read them.

Lauren Knutson: Okay. Great. Maybe you can answer that one. The one about RROF is the main one that needs to be signed electronically. The Authority to Use Grant Funds must be completed in the system by HUD, so HUD's not really dealing with that, it's already electronic. But it's fine now for the RROF.

Kathy McNulty: And the next one is: What if you completed the CV review in HEROS and didn't use the soon to be added CV funding source?



Lauren Knutson: I'd say this: if you want to, you can go back into HEROS, edit your review, select the CV funding source, save it, and re-archive it. But if you did it before that was a funding option, it's fine, you can leave it as is too.

Kathy McNulty: This person may have gotten their answer already, but is HEROS available to PHAs yet?

Lauren Knutson: Yes, it is available. We haven't done a formal rollout to PHAs, but if PHAs want to use HEROS, that's fine. They just need to make sure that their RE is using HEROS and has access to complete the certification.

Kathy McNulty: Next question: In the past, I've worked together with GHCD and local government to create and publish the environmental review. Does HEROS have the capacity to accommodate multiple parties from different organizations or will each have to do their own environmental review?

Lauren Knutson: That's a good question. So, HEROS does not have the capability to assign a review back and forth between two RE organizations. So, if it's two local governments that are partnering, one would have to identify themselves as the project lead and under the reviewing HEROS, but then you could upload a Request Release of Funds from the other RE and do it that way.

Or if these are partner organizations, if it's one local government and then you're working with several consultants and a nonprofit, for instance, you could pass the review back and forth between those partner organizations since they'd all be under the one responsible entity umbrella. But for two local governments, for instance, one would have to take the lead. But you could do one review in the system.

Kathy McNulty: Next question: When will the use of HEROS become required?

Lauren Knutson: That's a good question. So, currently, HEROS is required for Part 50 reviews on HUD, and they are required to enter reviews into HEROS which is currently optional for Part 38. We are hoping to make HEROS mandatory for entitlement REs by the end of the calendar year, although—and a big asterisk here—that depends on the status of some of our regulation reform and new NEPA regulations coming out of accounts on environmental quality.

So, depending on when those go into effect, we might not make it mandatory because HEROS will then require a lot of changes to match up with the bugs. So, earliest would be at the end of the calendar year, but I anticipate a bit of a delay from regulatory changes. But we will make sure to send out information and notify when we intend to make it mandatory.

It's good practice to get your staff HEROS access now in anticipation, I would encourage doing that, but we will certainly let everyone know when it will be mandatory so everyone can prepare.

Kathy McNulty: Next question: what is a tiered review? That can be answered by going to the HUD Exchange and in the Environmental Review Section, there is a link to Tiered Reviews. It takes some explanation, and since there are some questions that are related directly to using HEROS, I'd like to get to those. And then if you have a question after you look at the tier review information on the HUD Exchange, you can submit an AAQ or contact your local Office of the Environment, and they can help you.

So, the next questions is: Why is my Authority to Use Grant Funds page always grayed out no matter if the comment periods are over and the Request Release of Funds is uploaded?

Lauren Knutson: So, only HUD users can access the Authority to Use Grant Funds screen. So, that means that RE users and partner users cannot make any changes there, so that's why once you submit your Request Release of Funds, you'll have to wait for HUD to complete that screen and assign the review back to you.

And if there's a delay, like I mentioned, after the objection period has passed, please follow up with your HUD contact, give them a little nudge, and remind them to complete the Authority to Use Grant Funds screen in the system.

Kathy McNulty: What is the retention of ERRs in HEROS? Are they accessible to users after the first year or after one year?

Lauren Knutson: HEROS reviews will stay in system in the HEROS dashboard indefinitely; even if it's been over a year and they're no longer public on the HUD Exchange, they will still be in the HEROS dashboard, and they'll show up as the last person who is assigned the review. So, if it's been a lot of time and you're looking for it, it might not necessarily be assigned to you, you might have to look in the "Show All" dashboard, but they do stay in HEROS indefinitely and you can refer to it later on.

Kathy McNulty: A little clarifying question on the multiple REs: can each submit their own Request Release of Funds to receive their own Authority to Use Grant Funds through the HEROS system using one ERR?

Lauren Knutson: Yes. So, like I mentioned before, if two REs are working on the same project, one of those Res—you should figure out which one is the HEROS lead—one RE should create the review in HEROS and then you can upload to Request Release of Funds fund on the Request Release of Funds screen, and that means you would need two Authority to Use Grant Funds; we can deal with that on the HUD end: one can be filled out in the HEROS screen and then one can be uploaded on paper. But that's fine to do just one ERR in that case.

Kathy McNulty: Yeah, I would say follow up with both program officers—or however many program officers—to ensure that the information has gotten out to all the program officers you meant it to get out to.

Can you remind users that you need to log in every 30 days so as not to be locked out?

Lauren Knutson: Sure, that's a good point and I need to check on the number of days. I think, at least for IDIS—which HEROS is kind of under the IDIS system—you have to log in every 90 days for your account to stay active. So, I'm not sure it needs to be every 30 days in HEROS, but it is a good practice to log in every 30 days, just to make sure that your account won't be deactivated. But it's an IDIS issue that is causing that, HEROS does not automatically deactivate profiles. We're not going through and deactivating your account if you haven't accessed the system, so that's more on the IDIS side. I thought it was 90 days, but I will check on that with our system. But that is a good reminder, thank you.

Ben Sturm: Lauren and Kathy, I can in fact, confirm that for IDIS only, it is 90 days.

Lauren Knutson: Thank you.

Kathy McNulty: And how long does it take to obtain HEROS access and can access be expedited?

Lauren Knutson: That is also a good question. So, HEROS Access takes about two weeks, because it takes some time for us to submit the request to HUD IT Security and wait on them to send a user ID back to us. So, we can expedite the profile creation part, we can do that within a one-day turnaround once we get the ID information back. But we don't have control over the ID assignment process. So, we say about two weeks because sometimes it's a little faster and we can expedite to the best of our ability.

Kathy McNulty: And then CDBG-CVs, how does HUD expect us to write the project summary? We have 18 different projects with different agencies. I think this might require us to ask another question—I mean maybe that should be answered offline.

Lauren Knutson: Yeah, I think we would need more information there. But if there are different recipients, I would imagine that those would require separate reviews for each of the projects.

Kathy McNulty: Yeah, it depends on whether you're speaking about different grantees. I think that there's a tutorial on site to try.

Lauren Knutson: So, we didn't really talk about this: there is a practice environment for HEROS which you get access to when you request access to HEROS—so

you get access to the production environment and then also access to the training environment. So, you can use that to play around in the system, create sample reviews, practice using the different functionalities. So, you're welcome to use that before you enter a real review in the production environment. And we provide instructions on how to login to training when we send your login information through the system.

Kathy McNulty: If a partner organization changes their name, how do they update HEROS?

Lauren Knutson: You should submit an AAQ for more on that process.

Kathy McNulty: And for the next question: Is there a size limit on uploads? Well, I don't think there is, is there?

Lauren Knutson: There is, but it is very large. There is a size limit but it's large enough that it should be able to accommodate large attachments. Phase 1 environmental and assessments, for instance, are very large. Let's see. I thought this was an FAQ, but it might be in the user guide. I don't have that file size offhand. But you shouldn't run into issues with size, it's designed to accommodate large files. But if you look in the user guide, it is in there.

Kathy McNulty: Yeah, I always remember being told that it's such a large size that there is almost no limit, virtually.

Lauren Knutson: Great. So, here's some additional information for folks who may still have questions. And I just mentioned the user guide, so that walks through every screen in HEROS, and has a bunch of information about every textbox and field, and that's a good resource. And the how-to videos, the link to Ask-A-Question (that's the main AAQ portal to ask questions) and then FAQs.

Thank you, everyone, for participating and we will make this recording available soon on the HUD Exchange. And we hope you have a great rest of your day.

Kathy McNulty: Thanks, Lauren.