

Welcome to the HEROS How-To Video series. This video will show Partner users how to use HEROS to assist Responsible Entities and HUD with environmental reviews.

There are 4 basic user roles in HEROS: RE, HUD, Partner, and State Agency. Each user role has its own distinct privileges that may be assigned to a user based on their roles and responsibilities. Partner users represent an organization that works with HUD and/or an responsible entity to prepare ERs under Part 50 or 58. Partner organizations may be HUD recipients, including PHAs and nonprofits, or consulting firms that have been contracted to assist with the ER process. Partner users may start envtl reviews in HEROS and complete much of the analysis. However, the partner user role is distinct because unlike responsible entity and HUD users, Partner users may not make any determinations or findings or take any steps to finalize an environmental review.

Each HEROS user has a personalized profile with tailored user privileges based on their role in the ER process. When we create a profile for a partner user, we associate them with a partner organization. That partner organization is, in turn, associated with one or more REs and/or HUD. Both partner users and partner organizations may be associated with just one organization or with many organizations.

This graphic shows one possible arrangement of relationships. Our partner user, Jane Doe, works for Enviro Professionals Inc. Enviro professionals is associated with 2 different REs – Fairfax County and the city of Alexandria – as well as HUD. It has these relationships because all 3 organizations have hired Enviro professionals to assist with their ERs, and a HEROS administrator has associated Enviro Professionals with all 3. These relationships allow Jane to start a part 58 environmental review for Fairfax or Alexandria or to start a part 50 review for HUD, if she also has the proper privileges assigned to her.

The process of sharing an environmental review could be simple or complex, but here's an example of how complicated this could be in a project with a lot of parties involved. In this example, a recipient (maybe a PHA or a nonprofit) starts the ER in HEROS and enters the initial project information. They may then assign it to another partner user, in this case a consultant who was hired to do the envtl analysis. The consultant could make an initial recommendation regarding the LOR, complete the related law and authority screens as far as a partner user can, and upload all available maps and documents. At that point, the partner could assign the review back to the recipient organization for their review or directly to the responsible entity to complete the review. Once the responsible entity user has the review, they will review the partners' work, finalize all requirements, make all findings and determinations, and – as necessary – complete parts 1 and 2 of form 7015.15 – Request for Release of Funds and Certification. They could then assign the review back to the recipient partner to complete part 3 of the Request for Release of Funds and Certification electronically. Finally, the review would be assigned to HUD to complete the 7015.16.

This is what Jane Doe would see when she logs into HEROS. She works for Enviro Professionals, which has been hired by the city of Alexandria to assist with an environmental review. To work on an environmental review for HUD or a different RE, Jane would have to log out and log back in, this time selecting HUD or that RE.

Partner users are Likely to see an empty dashboard when they first log in. Select “start a new ER” to get started. The first screen you'll see as a Partner user asks whether you're starting a Part 50 or Part 58

review. You should only be able to select one or the other based on whether you are currently linked to HUD or responsible entity – but make sure to choose correctly. Once you have started an environmental review, this selection cannot be changed later. Next, you'll go to screen 1105 – initial screen to provide all the 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 responsible entity to update when the review is assigned to them (but it is important to be very clear about what is a placeholder).

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, and we'll start by looking at part 58. Screen 1105 has space to enter information on both a grant recipient (if the HUD recipient is NOT the RE) and a consultant organization. For Part 58 reviews, both of these fields are optional and will default to “none.”

If the grant recipient is **not** the RE, 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. A PHA code will appear if the selected recipient is a PHA. Manually enter the point of contact from the recipient who should be consulted on this environmental review. If the recipient is not in the pulldown, select other and type in the name of the organization and point of contact.

If a consultant is assisting with the envtl review in HEROS, follow the same process. Note that 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 it is not using HEROS, there is no need to provide their information here.

This section of the initial screen looks different for part 50 reviews, because there are too many organizations associated with HUD to include in a single pulldown menu. Start by searching for the applicant or grant recipient. Search by name or location and press Search. Your search results will appear on the right. Choose the correct organization and press ‘select.’ The selected organization (plus a PHA code, if appropriate) will appear on the screen and the envtl review will be linked to that organization. Enter the point of contact's name.

Next, enter the name of the HUD preparer (meaning the HUD employee responsible for completing the environmental review), as well as the consultant organization and point of contact, if any.

Continue through the screens following the usual steps in the environmental review process (as described in separate training). The next screen that is of particular concern for partner users is the level of review screen. (Note: this screenshot shows the Part 58 version of this screen, but the Part 50 screen is very similar)

As a Partner, you do NOT have the authority to determine a proposed project's level of review. However, HEROS does allow you to make an advisory recommendation to the responsible entity or HUD by selecting a level of review on this screen. You may want to discuss this decision with the RE/HUD before continuing on, or may need to turn the review over to them depending on program protocols. Select the level of review and all applicable activities and citations. On Part 58 reviews, if you are

unfamiliar with HUD's categorical exclusions, you can select "not sure" to go to the level of review determination assistant.

Next, you'll complete the analysis for the related environmental laws and authorities. This can be a little different for partners than responsible entity or HUD users, so let's look at the floodplain management screen as an example. Respond to each question as completely and accurately as possible to determine whether the project complies (or can, with mitigation, comply) with that law or authority. After selecting each response, press the <Next> button to move on to the next question.

As a partner, you will not be able to complete the full analysis for all laws and authorities. For 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. Similarly, you may suggest mitigation measures or project improvements, but the final decision will be HUD's (for part 50 reviews) or the REs (for part 58 reviews). HUD or the responsible entity will review and evaluate all of your responses and documentation and complete all compliance steps as needed.

HEROS requires you to respond to all system-generated questions on each screen before you will be able to upload documentation. Therefore, where you have documentation to upload, but you are not legally able to comply with all requirements, please respond to all questions using your best guesses and suggestions. If an 8-step process is required, you will be prompted to describe all mitigation measures. However, these will not be defined until after the 8-step process is completed. Enter a comment directed to HUD or the responsible entity with recommended mitigation measures. When the 8-step process is complete, HUD or the responsible entity will revise this section to include the final mitigation measures.

When you have completed all required questions, you will be directed to the "Screen Summary" to summarize compliance. A compliance determination will be automatically generated, but you should use this space to clearly state any notes, comments, or suggestions for the HUD or responsible entity staff who will complete the environmental review. Use the compliance determination to explain what actions you took and your suggested course of action. Your compliance determination should make it clear to HUD or the responsible entity which responses are final and which are only advisory. HUD or the responsible entity will complete the screen using your feedback.

Next, upload all supporting documentation that you want to submit to HUD or the RE. Be sure to upload all documents on the corresponding screen and using the correct upload button, so that HUD or the responsible entity can find it easily.

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 HUD or the RE, they will evaluate your entries, make edits as necessary, and complete each screen by responding to this question.

When all of your analysis is complete, you will be directed to screen 6205 – preparer notification screen. You will be prompted to generate a preview of the ERR. This will pop up in another window of your browser. You should generate the environmental review record and review it to ensure that you have completed all screens as fully and accurately as possible at this stage. Be sure to save this environmental review record for your records in case any of your entries are lost later.

When you're ready, assign the review to the next users – this may be a RE, HUD, or another preparer, depending on the type of review and your responsibilities. For more information on how to complete this step, please watch the how to video on assigning reviews. Note that you will not be able to edit the envtl review until it is assigned back to you.

For most partner users, screen 6205 is the last screen you can edit in HEROS. However, there is one exception: Partner users representing a recipient or subrecipient of HUD assistance may be granted privileges to edit screen 7015.15 – the REQUEST FOR RELEASE OF FUNDS AND CERTIFICATION so that they can complete part 3 of that screen.

If you have these privileges, you may edit that screen after the responsible entity assigns it back to you for your certification. Use the side menu to access this screen and make edits. For more information on completing this screen in HEROS, watch the HEROS how to video on completing the 7015.15. Don't forget to assign the review back to the responsible entity when your certification is complete.

Thank you for watching this HEROS how to video. For more information on using HEROS, go to the HEROS page on the HUD Exchange.