

Getting Started in HEROS

Welcome to the HEROS How To Video series. This video will tell you how to get started in HEROS, including an introduction to HEROS, how to access the system, and basic navigation.

HEROS – short for HUD Environmental Review Online System – was created to replace HUD’s paper-based environmental review forms with a single tool to help prepare, manage, share, and store environmental reviews online. HEROS can be used to complete environmental reviews for nearly all HUD programs, under Parts 50 and 58.

Anyone with a role in HUD’s environmental review process can use HEROS to help prepare environmental reviews. There are 4 basic user roles in HEROS, each with distinct privileges and variations:

- Responsible Entity users can create and edit Part 58 reviews. They can also use HEROS to complete and submit form 7015.15 – Request for Release of Funds and Certification. Any employee of a unit of general local, state, or tribal government may get access as a Responsible Entity user.
- HUD users may create and edit Part 50 reviews. Depending on privileges, they may also be able to view Part 58 reviews and prepare form 7015.16 – Authority to Use Grant Funds
- Partner Users assist HUD or Responsible Entities with Part 50 or Part 58 reviews. Partner users may include public housing authorities, nonprofit organizations, or other organizations that receive HUD funding, as well as consultants or contractors who have been hired to assist with environmental reviews.
- Finally, State Agency users are associated with state organizations that administer certain programs including State CDBG or HOME, in which the State assumes many of HUD’s responsibilities. This applies only where the State acts as HUD by approving HUD form 7015.16 – Authority to Use Grant Funds, and is distinct from situations where the state performs the environmental review as the responsible entity. State employees who perform environmental reviews themselves should request the responsible entity role.

HEROS may not be available to all user roles and programs at this time. Refer to the HEROS page on the HUD Exchange for information on the different user roles and privileges, availability of HEROS to different programs, and how to request HEROS access. Find the HEROS page at the link shown here or under Hot Topics on the main environmental review page on the HUD Exchange.

HUD staff inputs each HEROS user's profile individually to establish their distinct user role and privileges. When you request HEROS access, HUD staff will set up your user profile. When you're ready to log in, you will receive an email with information on how to log into HEROS and the latest information on trainings and resources.

We recommend accessing HEROS in Google Chrome or Internet Explorer. Users have reported problems when using Firefox.

The first thing you will see when you log into HEROS is the My Environmental Reviews Dashboard. This screen is the central file with all the reviews that you can edit or view in HEROS. Let's walk through all the features on this screen, starting at the top.

The blue banner at the top of the screen appears at the top of every screen in HEROS. There are 3 key features on this banner. In the upper right, you can see which HEROS environment you are in. If you're working on a real review, you should always be in the production environment, and you should see HEROS Version Prod and a series of numbers in this corner. If you're practicing using HEROS, either to help you learn how to use the system or to prepare to train others, you should use the training environment. You will see HEROS version training (and a series of numbers) in the upper right corner. Below that, you'll see Guide to HEROS. If you select this link, you will be taken outside the HEROS system, to the HEROS User guide on the HUD Exchange. On the left side of the blue banner, you'll see HEROS Home. Just like the Guide to HEROS link, this will open a separate window outside HEROS and direct you to the main HEROS page on the HUD Exchange, where you can find various HEROS training materials. If you have a question about HEROS while using the system, this is a great way to navigate to the FAQs.

Below the blue banner, you'll see a ribbon with links that direct to screens within HEROS. Just like the blue banner, this ribbon appears at the top of every screen in HEROS. You can return to this dashboard at any time by clicking <MY environmental reviews> in the upper left corner. HUD staff will see a link to the Search screen, where they can search for reviews by specific criteria. Depending on your role and privileges, you will see different options when you hover over the Reports link. Responsible Entity users can generate reports on their RE. HUD users can generate a variety of reports on environmental reviews in HEROS. The next link is to the admin screen. On this screen, all users can edit their contact information, and admin users can adjust user privileges. Finally, the logout link will log you out of HEROS.

Now, let's move on to the dashboard itself. Starting in the upper left, the first button you'll see is <start a new environmental review>. Press this button when you want to start an all new review. To the right is the <go to tiered reviews button>. Tiered reviews are stored on a completely separate dashboard, so make sure you are using the tiered reviews dashboard to start, edit, or view those reviews. Next to that button, you'll see two radio buttons. These allow you to toggle between two different views of the dashboard. By default, you'll start by only seeing the reviews that are assigned to you. Each review in HEROS has one assigned user – only

that assigned user can edit that review. When you log in, the reviews you'll see on the dashboard are those that you're actively working on, those that someone has assigned to you, and any older reviews that were marked completed but are still assigned to you. You can also toggle to the Show all button – in that view, you will see all reviews that you have the privileges to edit or just *view*.

Moving down, you'll see a table with the reviews that you have access to, depending on your role, privileges, and which view you've selected. For each of these reviews, you can see each project's name, location, status, level of review, the date it was last updated, the assigned user, the system-generated environmental review ID number, and whether it is part 50 or part 58. You can also use the arrows to sort, or the textboxes to filter in any of these fields.

There are two other columns to mention in this chart –generate ERR allows you to generate a Word document version of the environmental review record – this option is available only after a review has been marked complete or complete, conditioned on mitigation. For reviews that are still in progress, the next column allows you to cancel the review (or reopen cancelled reviews). If you cancel a review, you will be asked whether you are cancelling the review for environmental reasons – if something in the course of the environmental review caused you to cancel the review – for example, if the project was found to be in the floodway or other unacceptable site – select "Yes". Select no if the review is being canceled for other reasons, such as financial or scheduling problems.

To view or edit a review from the dashboard, select the radio button in the far-left column, then select one of the buttons at the bottom of the screen (you may need to scroll to the bottom of the screen to find these buttons). If you need to make changes to a review, make sure you select edit. Select view if you only want to a look over a review, but you don't plan to make any changes, including signing off on it. For more on the assign, view assignment history, and view or edit 7015.16 buttons, please watch the how to videos on those topics. That's it for the dashboard – now we're going to go through some of the navigation you'll use to prepare an environmental review in HEROS.

Once you get started in HEROS, you'll see a combination of yes/no, multiple choice, short answer, and long answer questions. Make sure you read all questions carefully to make sure you're responding accurately. If you're not sure how to answer a question, look for a blue box with a small "i" – these are called text tips, and they offer more information on certain prompts and questions. On the project summary screen, you'll see a variety of questions, including longer and shorter textboxes, and two uploads. Notice that some fields are marked with a red asterisk, meaning that the field is required. Those that do not have a red asterisk are optional or only required in some cases. You will be prompted to upload a *lot* of documents in HEROS – some are required, and some are not.

Read prompts carefully and use your discretion to decide whether an upload is required to demonstrate compliance, or whether a narrative response is sufficient. In some cases, you may

find that a document uploaded on one screen is requested again on another – in that case, there is no need to upload the same document twice. Instead, describe where in the review the document can be found, to avoid repetition. HEROS accepts a range of different document types, as seen on this slide. However, HEROS *cannot* process files with special characters, including underscores, periods, and apostrophes, in the file name. HEROS can handle some very large documents, including most Phase Is and Phase IIs, but may not be able to process some documents larger than 50 megabytes. If you find that a document isn't uploading, or you're having other issues with a review, a good place to start is by checking to see if your files have any special characters, as that will cause your reviews to experience larger problems.

Now let's go through how to upload a document in HEROS. First, press the upload button. You'll see a pop-up window – press browse to look through your files. Select your file or files, and then press upload. When all documents have been uploaded, the window will close, and your file will appear under the upload button. Press the red X next to the file name if you need to remove or replace it.

If you miss a required question or prompt, you'll get a red error message at the top of the screen. You may need to scroll to the top of the screen to see this message. Read these messages carefully to make sure you've completed all required fields. Note that here, the error message is at the top of the screen, but the missing response is at the bottom of the screen. And the question I need to answer is also highlighted in red.

It's extremely important to save your work regularly while using HEROS. There are a lot of different buttons in HEROS, so make sure you're pressing the right one, particularly when it comes to saving your work. Due to HUD IT System Protocols, you will be logged out of the system if you are inactive in HEROS for 20 minutes. You will receive a 3minute warning beforehand. It is important to save your work regularly to avoid losing it if you are timed out of the system.

One last hint – make sure you're taking advantage of the side menu. The side menu allows you to jump between screens. So if you're editing a review you already started, you can jump straight to the last screen you were working on without clicking through each screen. But be sure to use the side menu carefully– if you edit a screen, you must save your work using the save and continue buttons instead of jumping straight to the side menu. The side menu is dynamic, and depends on the level of review and other selections you make, so it will expand as you work, and it will look different in different reviews. The assign review button will always appear above the side menu in red.

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