

HEROS Starting a New Environmental Review

Welcome to the HEROS How To Video series. This video will tell you how to start and complete the first few screens of a new environmental review in HEROS. *This* video specifically covers standard, non-tiered environmental reviews. Tiered reviews are addressed in separate how to videos.

To start a new environmental review, start from the My environmental reviews dashboard. Click <start a new environmental review> in the upper left portion of the screen.

You will be directed to screen 1101 – Review Type, where you will need to select the environmental review procedures that will apply to your project. Part 50 environmental review procedures apply where HUD is responsible for completing the environmental review. Select part 58 if the review is being prepared by a Responsible Entity (or RE), meaning a unit of general local, state, or tribal government that has assumed environmental review responsibilities. Most HEROS users will find that, because of your privileges, you can only select one option or the other, but partner users who work with both HUD and responsible entities will have to be careful to make the correct selection. Even if one option is grayed out, select the radio button next to the appropriate Part, and press <save and continue>.

Next, you will be taken to screen 1105 – initial screen, where you will need to enter basic information about the review.

Start by naming the project. The project name should be unique enough to help you identify the project. It can be no more than 60 characters long, and may not include underscores.

Then complete the HUD funding source table. This table should have one row for each HUD program involved in the project. In each row, enter the grant or project number, and HUD program. To select the program, first select the HUD office or division that manages the program. Based on your selection under HUD program, you will get a second pulldown to select a program name. To add additional HUD programs, press the ‘add another funding source’ button.

Then respond to the questions and prompts on the screen. Required fields are marked with a red asterisk. Note that many fields are required, so it’s a good idea to gather all necessary project information prior to starting this screen. You will not be able to save your work and proceed to the next screen until all required fields are completed.

When asked for financial information, a rough estimate is sufficient. The purpose of this question is to get a sense of the project scope, and to assist with determining level of review.

Starting about halfway down, this screen differs substantially depending on whether the project is being processed under Part 50 or part 58, so we'll look at each version separately, starting with Part 58.

Those completing Part 58 reviews will be asked for a state or local identifier, which may not be clear. Note the text tip on this screen – clicking the blue information button will generate a pop-up with more information on this field.

HEROS automatically generates the responsible entity and its contact information. Make sure this information is correct before continuing. Then, enter the name of the environmental review preparer and the certifying officer. If you are a responsible entity user, you are most likely the environmental review preparer. If you are a partner user, this would be the person with the responsible entity who will complete the review.

Every review will have an RE, but the next 2 fields will only be required in some cases. If there is a grant recipient, such as a nonprofit or public housing authority, that cannot act as RE, enter their information under grant recipient information. Start by searching to see if the organization is already linked to this responsible entity in HEROS. Press the "Search" radio button, then click on the pulldown labeled 'select partner'. If the organization is already associated with the responsible entity in HEROS, it will appear in this pulldown. If you select a public housing authority, their PHA code will automatically show next to the organization's name

Enter a point of contact for the organization who should take any questions about the review on behalf of that organization. If the organization is not already linked, that's fine – just select "other" and enter the name of the organization and point of contact in the textboxes provided. If the responsible entity itself is the recipient, leave the default (none) selected. Next, if you are a partner user representing a consultant or contractor, complete the consultant information section using the same process. Press search and select your organization in the pulldown menu. Then enter your own name as the preparer, and press 'save and continue' to move on to the next screen.

Now, let's look at the second half of the initial screen for *part 50* reviews. First, you will be asked if the project involves more than 200 units. If it does, *and the project requires an EA*, an ECO must be given the opportunity to review and comment on the environmental review. So make sure to consult with them early in the process.

For part 50 reviews, there will always be an applicant or grant recipient, so this is a required field. Again, start by search to see if the organization is in HEROS so that this review can be associated with it. Select the search radio button, then search for the organization by name, city, and/or state. You can search using as many or as few filters as you'd like. Press the search button, and your results will appear on the right. If the organization you're looking for appears in the search, click on its name and press the select button. The organization name will appear on the left. Again, if the organization is a public housing authority, the PHA code will appear as

well. Type in the name of the point of contact who should take any questions about this review for that organization. If the organization you're looking for does not come up in the search, it may not yet exist in HEROS. Select the "other" radio button, and type in the names of the organization and the point of contact. Then, type in the name of the HUD user who will be responsible for completing the review. Finally, if you are a partner user representing a consultant or contractor, enter the name of your employer and your name under Consultant information. Then press <save and continue> to move on to the next screen.

Screen 1120 – Sensitive Information – will come up only if you indicate that the project involves a CPD program, such as CDBG, HOME, or Homeless programs. If one of these programs is involved in the project, you'll be prompted to consider whether this environmental review could reveal sensitive information. For example, if the project affects a domestic violence shelter, steps should be taken to keep its location confidential. Because environmental reviews are made available to the public, no environmental review should include private or sensitive information. *This* screen is intended to address only those projects where the nature of the project itself should be kept secure; however, there are separate prompts to address other potentially sensitive information, such as the location of sensitive tribal resources.

Next, all reviews will be directed to Screen 1125 – Project Summary to define the plans and location of the proposed project. First, you'll be prompted to enter a project description. This should capture the maximum anticipated scope of the project, aggregating all logically connected actions, and describing all physical impacts. Your project description should be clear and detailed enough to give any reader a complete understanding of the proposed project. The project description textbox allows a maximum of 4000 characters – if you need more space, please provide a brief overview of the project in this textbox and upload supplementary documents in the upload box provided below.

If you indicated on the initial screen that the project includes public housing assistance, you'll be asked for information about the Asset Management Projects, or AMPs, covered by the review. You may enter up to 5 AMPs in the spaces provided – one in each space. Use the radio buttons below to indicate whether the review covers the full AMP or part of the AMP. Select N/A if the review does not cover an AMP.

Continuing down the Project summary screen, the next section is for project location information. While only the city and state are required here, please provide as much detail as possible. The street address and zip code are optional, to accommodate new construction projects where that information is not yet available. For larger projects that affect more than one address, select a representative street address to enter here. Where available, press the Validate Address button to confirm the location. You may use the location information textbox to provide more information on the project location. This box is especially helpful for projects where a street address does not provide a complete picture of the project location, such as large or new construction projects. Use the upload button here for any additional

documentation on the project description or location, including maps, plans, and more detailed project descriptions.

Next, you'll be prompted to provide information on the site visit, if one was conducted. Enter the name and title of the person who conducted the field inspection, as well as the date it was performed. You should also upload any additional documentation from that site visit using the upload box provided.

Finally, the last section in the project summary screen contains 3 quick questions about the activities involved in the project. It is important to answer these questions accurately and completely, as future screens in HEROS will rely on your responses to these questions. First, indicate the activities involved in the proposed project, including acquisition, refinance, maintenance, rehabilitation, new construction, demolition, disposition, and/or soft costs. You may select as many of these activities as apply. Next, select yes or no to indicate whether any properties will undergo a change in land use – for example, from commercial to residential. Finally, select the anticipated use of the property – for example, residential, non-residential, public facility, or vacant land -- after the project is completed. If you select residential, you will be prompted to indicate whether the property is single family – meaning a building or development with 1-4 units per site – or multifamily – meaning a building or site with five or more units.

Take note of the save buttons on this screen. In addition to save and continue and save and go back, this screen also has a 'save' button. This button allows you to save the screen while you continue to work on it. Please take advantage of this button, as it will allow you to draft longer responses in the project description and location textboxes without the risk of losing your work if you are timed out of the system. Once you have finished the entire screen, press save and continue to move on to selecting the project's level of review.

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