

## Heritage Hub Instructions

The Massachusetts Natural Heritage & Endangered Species Program (NHESP) tracks records of rare species sightings through the Heritage Hub.

**Tip:** You can find detailed instructions about all parts of the Heritage Hub in the Help Documentation: <https://www.mass.gov/doc/heritage-hub-help-documentation/download>.

**Tip:** See the attached Avian Records Acceptance Requirements to see a list of species of interest and the minimum conditions that warrant a report, which typically involve breeding birds.

Here is an abbreviated set of instructions for using the site to submit a single observation as a private observer.

1. Log into the Heritage Hub to access to create an account from here: <https://www.mass.gov/info-details/heritage-hub-overview>
2. If you have not already done so, first register to set up an account.  
**Tip:** See the Heritage Hub Help Documentation linked above for details on how to create an account and select a password.
3. We also ask that you join the BBC “organization” in the Heritage Hub. You will be able to toggle between your private observations and those you submitted as part of the BBC. Directions on how to join the BBC “organization” are at the end of this document.

Joining the club account enables the BBC to coordinate our conservation efforts, as well as track the observations that we are submitting to the state for research and conservation.

4. When you open the Heritage Hub you will see a list of your submissions to date on your personalized observation dashboard. You can toggle between personal observations and those submitted as part of the BBC “organization”.
5. We ask that you add observations from BBC trips as part of the BBC organization. When you log in pick “organization” under submission type. You will see the BBC listed as your organization:

### Organization Dashboard (User)


Brookline Bird Club

Choose a Submission Type


☐ Private ☒ Organization

6. To start adding an observation under the “Observation Forms” tab pick “Animal Observation Report”.

**Tip:** You can click on this symbol  to duplicate an existing entry and start adding a new one.

7. To start adding an observation you need to pick a target species from a pop-up webform. First click on  to start that process. You can filter species to birds by selecting Vertebrate as the Taxonomic Group and Birds as the subgroup. Click the search button and select your

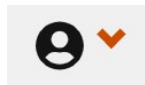
species from the list below. This step will return you to the main form page. Alternatively, you can type the species' common or scientific name and click the "search" button.

8. A number of fields are required on the **Observation Details Tab** of the form:
  - a. Species
  - b. Town(s)
  - c. Date
  - d. Directions to location
  - e. Diagnostic characteristics
  - f. Whether you confident in the ID
  - g. Whether you collected a specimen. If so, where it is deposited.
  - h. Number of individuals observed.
9. Next is the Map Tab.
  - a. *Tip:* You can pick a different background such as an aerial map using this icon is the upper left of the map: 
  - b. *Tip:* You must zoom in to at least 1:600 feet for the location selection tools to activate in the upper right corner of the map. You can see the scale in a small box in the lower right of the map.
  - c. Select the location of your observation, save and continue.
  - d. See the Help Document for more information about using the mapping tool: <https://www.mass.gov/doc/heritage-hub-help-documentation/download>.
10. That's it! Those are all the required data fields. You will need to Save and Continue through the other tabs of the form but nothing else is required. If you want to upload photos or recordings use the Uploads Tab.
11. To complete the report pick Save and Review. If everything is in order scroll to the bottom of the page, enter your name and date and certify that you are reporting to the best of your knowledge. This last step is required because reports to the Heritage Hub can be used as part of legal and regulatory processes.

**The instructions below indicate how to connect your account to the BBC "organization" account.**

This club account makes it easier for us to coordinate our conservation efforts as well as track the observations that we are submitting to the state for research and conservation.

1. Go to the dropdown menu with the person icon, which is located under your name.



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- Click "User Profile."
- Click on "Organization Requests" and then "Join/Request New Organization."
- Search for "Brookline Bird Club."
- Click on "Send Request."

2. Once you have submitted a request to join the Brookline Bird Club organization, send an email to the organization administrators letting them know that you've requested to join.
  - Admins: Zack Weber ([birdingwithzackweber@gmail.com](mailto:birdingwithzackweber@gmail.com)) and Cliff Cook ([ccook@brooklinebirdclub.org](mailto:ccook@brooklinebirdclub.org)).
3. After being admitted to the BBC "organization," select "Organization/Company" near the top of the reporting form whenever you report a rare bird observed during a BBC trip.

**Observation Details**

Are you submitting this form as a member of an organization/company or under your private account? ⓘ

**Note:** Once saved, your answer will be locked, and this question will no longer be available.

☐ Private    ☒ Organization/Company

Choose an organization \*

Brookline Bird Club

▼

4. Proceed as you normally would to fill out and submit the completed "Animal Observation Report."