# **Submitting Files for SHPO Review**

# Historic Preservation Certification Applications



CHECKLIST

This checklist summarizes steps and provides tips for successfully submitting historic preservation certification applications (HPCA) for review by Montana SHPO.

Montana SHPO is the statewide facilitator for both the Federal and State Historic Rehabilitation Income Tax Credit Programs. These credits offer income tax credits for the rehabilitation of income-producing properties listed in the National Register of Historic Places. Both programs incentivize the revitalization of income-producing historic real estate and level the playing field when redevelopment exceeds the cost of new construction.

The *Federal tax credit* uses a <u>three-part application</u> to award successful applicants an income tax credit equal to 20% of their rehab investment. The *State of Montana's income tax credit* is equal to 25% of the amount an owner claims under the Federal program. Those wishing to claim the state credit must first be certified for credits under the Federal program.

The process described below <u>applies to all three parts</u> of the application; please follow the process <u>each time</u> you submit a working draft or final draft of Part 1, Part 2, or Part 3.

# 1. PREPARE REQUIRED DIGITAL COMPONENTS FOR UPLOAD

As of August 15, 2023, both the National Park Service (NPS) and SHPO only accept electronic submissions for the Federal Historic Rehabilitation Income Tax Credit Program. As part of this change, NPS has issued <u>revised</u> <u>application forms and documentation requirements</u>, available for download from their website:

https://www.nps.gov/subjects/taxincentives/hpca-electronic-submission.htm

Please review all documentation guidance and contact the Montana SHPO's <u>Historic Architecture</u> <u>Specialist</u> with any questions.

Before submitting digital documentation, MAKE SURE that each part of your final draft application adheres to the <u>formatting and naming conventions</u> required by the National Park Service (NPS). Working drafts do not need to adhere to these conventions, but SHPO will not forward your final draft to NPS until it is correctly formatted.

# 2. SUBMIT DIGITAL DOCUMENTATION

See next page...

### **QUESTIONS?**

Please reach out to Montana SHPO's Historic Architecture Specialist at 406.444.7717 or lindsay.tran@mt.gov

### How to Upload Historic Tax Credit Application Files with Montana SHPO's Portal

## **Step 1 –**

Create a <u>State of Montana File</u> <u>Transfer Service</u> account by clicking on **Register Now** and following the instructions to create your account.



## **Step 2** –

Go to

https://mhs.mt.gov/Shpo/index3

Click on **Submit Files to SHPO** on the right-hand side.

# Step 3 –

Click on the **Login** button and sign in using your Montana File Transfer Service credentials from step 1.

#### Step 4 –

Select <u>NPS/GENERAL</u> from the dropdown menu in the **Agency** field.

# **Step 7** –

Drag and drop each part of your application as separate PDFs or folders into the **Report Documents** box.

### Step 8 -

Click the **Submit** button.

Once you see the messages "File successfully transferred" and "Processing complete", you can close your browser.





#### Step 5 –

Type the <u>APPLICANT'S NAME</u> into the **Consulting Firm** field.

#### Step 6 –

Type the <u>PROPERTY NAME</u> or street address and application <u>Part 1, 2, or 3</u> into the **Project Name** field

State Historic Preservation Unic				Logout login mt gov
Montana Historical Society	Name Submit Date to SUDO			A Section Commence of the Comm
ISS CRAIS* Project Bigliship Effect DOCUMENT SUBMISSION  ***Characters for Data States Joint  ***Characters of Data States Joint  ***Ch	More - Submit Date to SHPO  submit Park to SHPO  submit Park qualred data to the Batte Materia Personation of digital reg. In Joint Myron has any questions, please contact di Creating From Contesting From C	Office for trobse-Paper transdeglints gov Propert Namo/Number © '255 worth Source, Turk?		Bestructions Feed
Please have CRIS forms submitted separately from the Report Doc SEND FILES:	AUTHOR INC.			
Report Documents	Site Forms		GIS Files	
Perity 27Medicine.  Description  Description	Per 2_Marine_77N . Between the	they files have to upload		Chicp files here to upread
9.bmt				
* After submitting your documents please do not close your brown		n of the three columns.		
File successfully tra	risierreu.			
Processing complete				