

Creating a Complete Site Record

STANDARDS FOR PREPARING SITE FORMS, PHOTO AND MAP ATTACHMENTS, AND DIGITAL GIS FILES

All forms and documents referenced herein are available at: https://mhs.mt.gov/Shpo/Forms

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1. Introduction & Resources

A complete "record" includes a site form, photographs, maps, and GIS files. Montana SHPO provides six site record forms for various types of sites.

- 1. CS-R: Cultural Site Record
- 2. AE-R: Architecture/Engineering Record
- 3. CU-R: Site Update Record
- 4. IF-R: Isolated Find Record
- 5. SC-R: Stone Circle Record
- 6. PALEO-R: Paleontological Record

A site's Smithsonian number is a standard identifier for tracking properties and is required to process all consultation, including resolving APE (area of potential effect), National Register eligibility, and potential effects on cultural resources. Smithsonian number assignments <u>require a complete site record</u> (form, photos, and map) and GIS shapefiles that accurately delineate the site boundary.

This document provides instructions on completing each required component of a site record. For more information on preparing site documentation:

- **2.3 Documenting Sites** in the Montana SHPO Consultation Guide https://mhs.mt.gov/Shpo/Archaeology/ConsultingWith
- Requesting Smithsonian Numbers for Site Records What to Submit: Quick Reference (QR2) https://mhs.mt.gov/Shpo/docs/smithsonian-qr2.pdf
- **How to Apply National Register Criteria for Evaluation** National Park Service, National Register Bulletin. 1997. https://www.nps.gov/subjects/nationalregister/upload/NRB-15 web508.pdf
- Montana Cadastral http://svc.mt.gov/msl/mtcadastral

2. Preparing Site Forms: CSR, AER, and CU Forms

Which form should I use?

In 2022, the Montana State Historic Preservation Office (SHPO) replaced the CRIS (Cultural Resource Information System) and HPR (Historic Property Record) forms with the CSR (Cultural Site Record) and AER (Architecture-Engineering Record) forms, respectively. Please ensure that you are using the most recent forms by visiting https://mhs.mt.gov/shpo/forms. If you are uncertain about which form to use, please contact Montana SHPO Cultural Records staff at (406) 444-4724.

Who is responsible for completing this form?

The Principal Investigator is responsible for ensuring that the information in this form is complete and accurate as per the Montana SHPO's data standards. Please consult SHPO's Montana SHPO Consultation Guide, 2023 for updated standards for recording cultural and architectural resources in Montana.

How do I get a Smithsonian number for this form?

To receive a Smithsonian number, you must submit a completed CS-R or AE-R form to SHPO's Cultural Records Assistant for review; described in section 7 below.

Should I use metric or imperial units of measure?

We will accept both units if they are used consistently and labeled clearly throughout the form.

Can I paste content into this form from MS Word?

Yes. With the word document open, go to File>Options>Advanced. Scroll down to "Cut, copy, and paste" and change the following settings:

- Pasting within the same document: "Keep Text Only"
- Pasting between documents: "Keep Text Only"
- Pasting between documents when style definitions conflict: "Keep Text Only"
- Pasting from other programs: "Keep Text Only"

File Naming Conventions

Please name the site form according to the site's temporary field designation or site name. If you are submitting more than ten site forms at once for Smithsonian Number assignment, please label the sites in the order you would like numbers to be assigned. For example, FieldDesignation_Site1.pdf, FieldDesignation_Site2.pdf, FieldDesignation_Site3.pdf, etc.

Form Field Descriptions

1. IDENTIFICATION

- a. SITE NAME/FIELD DESIGNATION: Name or number used to identify the site (other than the Smithsonian number)
- b. **SMITHSONIAN NUMBER:** The Smithsonian system is a nationwide registry system consisting of three parts: state number + two-letter county code + four-digit number (e.g., 24DL0290). Previously recorded sites may already have a Smithsonian number assigned. For newly recorded sites, SHPO will issue a new Smithsonian number upon receipt of a completed CS-R or AE-R form.
- c. **RECORD TYPE**: If this is the first time the site has been documented on a form, check NEW. If there are previously completed site forms for this location, check UPDATED.
- d. PROJECT NAME: Provide the project name if the site is located with a project or inventory area.
- e. **PROJECT NUMBER:** Provide the agency project number if the site is located within a project area.
- f. **DATE FIRST RECORDED/UPDATED:** For a newly recorded site, enter the date of this current record. If you are performing an update to a previously recorded site, you must also provide the date of the first record.
- g. **RECORDED/UPDATED BY:** Provide the name and contact information for the person currently recording the site, and information about the person who originally recorded the site (if performing a site update).

2. LOCATION

- a. **COUNTY:** Name of the county where the site is located.
- b. **LOT/BLOCK and ADDRESS:** Complete these fields for Architectural and Engineering Records (AE-R); optional for Cultural Site Records (CS-R).
- c. **CITY/TOWN:** Provide the name of the city/town nearest to the site location.
- d. **NARRATIVE OF ACCESS:** Provide directions on how to access the site. Directions should begin from a major road intersection or town and include distances and land markers that are unlikely to change in the future (e.g., roads, rivers, structures). This section is not required if the site can be easily located with an address, legal location, or GPS coordinates.
- e. TOWNSHIP, RANGE, AND SECTION (TRS) or "Legal Location" information is available from property records at the county tax

- assessor or planning office, the <u>Montana Cadastral application</u>, or from a USGS 7.5-minute topographic quadrangle map. To comply with Montana SHPO's data standards, please identify Township as either N or S, Range as either W or E, and the section quarter (QTR) as NW, SW, NE, or SE.
- f. **UTM or LATITUDE/LONGITUDE:** Record the coordinates for the center of the site using either UTM or Lat/Long expressed to the 6th decimal point.

3. OWNERSHIP / USE

- a. **CURRENT OWNER, ADMINISTRATIVE/SURFACE OWNERSHIP:** Indicate whether the <u>current</u> owner is a public or private entity and include the current owner's name, agency, region and/or district office, where applicable.
- b. **CURRENT USE:** Briefly describe how the property/site is currently used (e.g., commercial, agricultural, tourism, recreational, etc.)
- c. **ORIGINAL OWNER:** Indicate whether the <u>original</u> owner is a public or private entity and include original owner's name, agency, region and/or district office, where applicable.
- d. **HISTORIC USE:** Briefly describe how the property/site was historically used (e.g., commercial, agricultural, tourism, recreational, etc.). For sites with multiple periods or significance or multiple historic uses, indicate the time period associated with each use.

4. CULTURAL SITE AND ENVIRONMENT DESCRIPTION (CS-R)

- a. **SITE OR PROPERTY TYPE:** Select all site types that apply from SHPO's recommended *Site/Property Types for Cultural and Architecture-Engineering Records*.
- b. **SITE TIME PERIOD:** Select the appropriate general time period (precontact, historic, multicomponent), and the specific time period (Paleoindian, early archaic, 1920s-1930s, etc.) from SHPO's recommended *Time Periods for Cultural and Architecture-Engineering Records*.
- c. SITE DIMENSIONS: Provide general dimensions of the site (e.g., length and width) with consistent units of measure.
- d. SURFACE VISIBILITY (%): Describe the ground surface visibility of the site as a percentage.
- e. NARRATIVE DESCRIPTION OF SITE: Provide a general description of the site, features, artifacts, and condition.
- f. **FEATURE DESCRIPTIONS:** Provide more details about rock structures, lithic concentrations denoting activity areas, and other features at the site. Describe each feature in detail and cross-reference with photos and a sketch map using a clear and consistent numbering/naming system.
- g. ARTIFACTS: Describe and include a numerical count for each type of artifact observed at the site (i.e., metal, ceramic, wood, glass, plastic, bone, etc.). Aggregate data presented in tables or lists (such as for primary, secondary, and tertiary flakes) are acceptable.
- h. **DIAGNOSTIC ARTIFACTS:** Describe in detail any artifacts that can be identified diagnostically. Please see for *Diagnostic Types* for Cultural and Architecture-Engineering Records for reference.
- i. **SUBSURFACE TESTING:** Describe the results of any testing, soil types, depth, the extent of cultural deposits, number and type of tests performed, and any other information on subsurface exposure.
- j. **SITE FUNCTION/INTERPRETATION:** If the function of the site can be determined, it should be discussed here and justified by the description. Best guesses or hypothesis on function may also be included, but please preface the information within this context. Do not force a site function/interpretation.
- k. **ELEVATION:** Provide the elevation <u>in feet</u>.
- I. VIEW/ASPECT: Provide the estimated direction and distance that the unaided human eye can see from the site. Note any landmarks, such as named mountain peaks or natural lakes, in view.
- m. **NEAREST AVAILABLE WATER SOURCE:** Describe and/or record the name of the nearest source of water (stream, river, lake, spring) to the site.
- n. **SEDIMENTS:** Describe the sediments at the site location.
- o. **DEPOSITION:** Describe the site's deposition (e.g., Surface, Buried, Surface and Buried, Redeposited, etc.)
- p. **GEOGRAPHIC SETTING:** Describe the landscape / general geographic setting of the site location.
- q. **LOCAL VEGETATION:** Describe the vegetation located within the site boundary and list any culturally important plants (food, medicine, tools).

4. HISTORIC PROPERTY / ARCHITECTURE DESCRIPTION (AE-R)

- a. **PROPERTY TYPE:** Select all site/property types that apply from SHPO's recommended *Site/Property Types for Cultural and Architecture-Engineering Records*. See the MT SHPO's recommended site type list on the SHPO website, please provide all site types that may apply.
- b. **ARCHITECTURAL STYLE:** Describe the structure's architectural style(s).
- c. CONSTRUCTION DATE: Provide the construction date and indicate whether the date is "actual" or "estimated". Estimated date ranges such as "after 1997 and before 1893" are acceptable if the exact construction date is unknown. Major alterations, additions, etc. should be noted below under STATUS.
- d. **ARCHITECT INFORMATION:** Provide the name(s), firm, city, and state of the structure's architect. Enter "unknown" as needed.
- e. **CONSTRUCTION INFORMATION:** Provide the name(s), firm, city, and state of the builder or contractor, if known. Enter "unknown" as needed.
- f. **NARRATIVE DESCRIPTION OF PROPERTY:** Provide a description of the property, including the setting, buildings, and other resources (ditches, fences, agricultural fields, etc.). Describe individual buildings according to their shape, number of stories, architectural style, roof shape, type of foundation, type of construction, building materials, exterior wall materials, and any other major stylistic elements or distinguishing features (chimneys, porches, window and door types, etc.). Indicate whether the interiors of the buildings contribute to their integrity.
- g. **HISTORY OF PROPERTY:** Briefly discuss the history of the property as it relates to important events, historic trends, and persons. Provide as much information about the history of the building and people associated with the building as possible. Please cite your sources or note where information was acquired.
- h. **STATUS:** Indicate whether the structure is in its original location, and include dates and details about any major alterations, additions, relocation, etc. made to the structure.

5. NR EVALUATION / ASSESSMENT

- a. **FORMAL ELIGIBILITY DETERMINATION STATUS:** Indicate the results of any previous <u>formal determination</u> of eligibility for this site/property. Formal determinations of Eligibility are documented by a letter from SHPO or the Keeper of the National Register.
- b. **ELIGIBILITY ASSESSMENT:** Indicate if the site/property currently meets or does not meet eligibility criteria for the National Register as an individual property or as a contributing or non-contributing element to a historic district.
- c. **HISTORIC DISTRICT:** If the site/property occurs within a historic district, provide the district's name. For a resource/property not eligible for NR-listing either individually or as a contributing resource to a district, it remains important to indicate if the non-eligible element is located within a district.
- d. **MEETS CRITERION:** Mark Yes or No and provide an evidence-based, research-supported argument for/against each criterion (A, B, C, D) for <u>National Register Eligibility</u>. Refer to the National Park Service's bulletin *How to Apply National Register Criterion for Evaluation* (1997) to learn more about determining the eligibility of a site for the National Register of Historic Places (NR).
- e. **INTEGRITY:** Discuss the aspects of historic integrity for the resource, including location, setting, design, materials, workmanship, feeling, association, etc. For each aspect, describe the ability of the resource to convey its historic significance, as well as whether any loss of a specific aspect of integrity has occurred.
- f. **POSSIBLE IMPACTS TO SITE:** Discuss and distinguish between current, potential, direct, and indirect environmental and economic impacts to the site. Include impacts of proposed actions and their potential impact to the site's NR eligibility or integrity.

6. SOURCES

Cite sources of historical information used to prepare this form, including interviews, newspapers, journal articles, books, historic photograph, websites, etc. Follow a consistent bibliographic format that includes dates.

7. LIST ALL photographs, maps, and figures REFERENCED IN THIS FORM

- a. FIGURE LABEL: Consistently label each photo, map, and figure with a unique name or number.
- b. **CAPTION/DESCRIPTION:** Include a brief description of the photo subject/view and photo direction.
- c. PHOTOGRAPHER AND DATE: Identify the photographer / map creator, and the month/day/year of photo/map.

IMPORTANT: DO NOT insert images for photos, maps, and other figures into the form document. See directions below.

Supporting photographs, maps, and other figures referenced need to be submitted according to directions described below. To accommodate the wide variety of technology used to collect and create supporting images, users can create compatible attachment pages using the software / method of their choosing. Photos, maps and figures should be saved as PDF and combined with a completed CSR or AER Form. The guidelines provide a template to ensure consistent formatting and complete information. For more detailed mapping and photography standards, please review Montana SHPO Consultation Guide, 2023.

SITE UPDATES (CU-R)

OFFERING ELABORATION ON CONSULTING WITH THE MONTANA SHPO GUIDELINES AND PROCEDURES:

"19. complete and typed Montana CRIS forms (see Appendix 4) or equivalent must be included for all sites located by the survey. Updated site forms should be included for previously recorded sites in the APE as well as those relocated to determine that they were outside the APE. For architectural properties, the Montana Historical and Architectural Inventory form is recommended. Paleontological localities should be recorded on the appropriate paleontological form. "(Step Two: Identify Historic Properties, D: Reporting Survey Results)

The SHPO office expects every recorded site, regardless of eligibility status, within the project's area of potential effect to be discussed in the report and updated. In some circumstances, the site update requirement may be waived. Any such circumstances must be discussed with SHPO staff prior to the cultural inventory. These discussions must have written documentation showing SHPO staff approval and be summarized in the final inventory report.

If the original site form or prior site update is older than 10 years, a new Cultural Site Record (CS-R) or Architecture and Engineering Record (AE-R) Form should be completed. When this applies, inventory reports should include a completed CS-R or AE-R form with all sections completed and GIS shapefiles showing the site boundary.

If the original site form or prior site update was completed within the last 10 years, then only the changes to the site need to be documented in the update. It is NOT necessary to complete the entire CS-R or AE-R for all site updates. However, if the original site form left sections of the CS-R form blank, they should be completed as part of the update process. Contextual information consistent with the original form does not need to be redocumented. This would most likely include the site's elevation, available water sources, environmental setting, and historical context. The update should focus on a description of the site/features, any changes observed since the last site recording, new research or information, current photos, and current maps. An example modified site update form can be found on our website. We suggest using this CS-R Update Form for situations where the original site form or prior site update was completed within the last 10 years.

Site/Property Types, Time Periods, and Diagnostics

HISTORIC SITE TYPES

Historic Agriculture **Historic Apartment House** Historic Architecture **Historic Aviation** Historic Bank Historic Bar/Saloon

Historic Barn Historic Battlefield

Historic Building Foundation Historic Cairn/Land Marker

Historic Campsite Historic Cattle Camp

Historic CCC

Historic Cemetery/Grave

Historic Church Historic Coal Mine Historic Commercial Development

Historic Communication Historic Community Hall **Historic Conservation**

Historic Corral **Historic Courthouse**

Historic Dam

Historic Depression(s) Historic Designed Landscape

Historic District Historic Dude Ranch

Historic Dug-Out **Historic Education**

Historic Energy Development

Historic Exploration Historic Fence

Historic Ferry/Landing

Historic Fire Lookout

Historic Flume **Historic Fort Site**

Historic Fraternal Lodge

Historic Fur Trade Historic Gas Station Historic Cribbed Log Occupation Structure Historic Gas/Oil Well Historic Grain Elevator

> Historic Hard Rock Mine Historic Health Facility

Historic Homestead/Farmstead

Historic Hotel/Motel Historic Indian Agency

Historic Industrial Development Historic Inscription/Signage Historic Irrigation System

Historic Jail/Prison

Historic Land/Survey Marker

Historic Library PRECONTACT SITE TYPES TIME PERIODS Historic Log Structure Historic Marine Precontact Animal Processing Area Cretaceous Historic Material Concentration Precontact Bedrock Quarry Jurassic Historic Mausoleum Precontact Bison Jump Mississippian Historic Military Site Precontact Conical Timbered Lodge Quaternary **Historic Mining** Precontact Culturally Modified Tree(s) Tertiary Historic Mission Precontact District Triassic Historic Municipal Infrastructure Precontact Firehearths or Roasting Pits, FCR Prehistoric More Than One Period **Historic Outbuildings Precontact Fishing Site** Prehistoric Late Period Historic Pipeline Precontact Fortification Site(s) Prehistoric Middle Period Historic Placer Mine **Precontact Game Drives** Prehistoric Paleo-Indian Historic Political/Government Precontact Game Pound 1859 and earlier Historic Post Office 1860-1869 Precontact Kill Site/Trap Historic Quarry Precontact Lithic Material Concentration 1870-1879 Historic Railroad Precontact Lookout 1880-1889 Historic Railroad Bridge Precontact Medicine Wheel 1890-1899 Historic Railroad Building/Structure Precontact Paleopoint Isolate 1900-1909 Historic Ranch Precontact Petroglyph 1910-1919 **Historic Ranger Station** Precontact Pictograph 1920-1930 **Historic Reclamation** Precontact Pits; Eagle Catching, Battle, etc. 1930-1939 Historic Recreation/Tourism Precontact Rock Alignment(s) 1940-1949 Historic Religion Precontact Rock Cairn(s) 1950-1959 Historic Research Station Precontact Rock Pile(s) 1960-1969 Historic Residence Precontact Rock Shelter or Cave 1970-1979 Historic Residential Development Precontact Rock Structure(s) 1980-1989 Historic Road Precontact Site Historic More Than One Decade Historic Road/Trail Historic Period **Precontact Stone Circle** Historic Rock Structure(s) Precontact Surface Stone Quarry Combination **Historic Sawmills Precontact Sweat Lodge** Historic School Precontact Trail DIAGNOSTICS **Historic Science Precontact Vision Quest Structure** Historic Settlement/Townsite Agate Basin Historic Sheep Camp PALEONTOLOGICAL SITE TYPES Angostura **Historic Site** Avonlea Historic Smelter Fossil Fish Besant **Historic Stage Route** Fossil Flying Reptile Clovis Historic Stamp Mill Fossil Invertebrate Cody knife **Historic Stock Raising** Corner-notched Fossil Mammal **Historic Structure** Fossil Marine Reptile Duncan Historic Theater Fossil Organic Eden Vallev **Historic Timber Camp** Fossil Paleontological Locality Folsom **Historic Timber Harvesting** Fossil Trace Hanna Historic Trail Hell Gap Historic Transmission Line Mckean ADDITIONAL SITE TYPES **Historic Transportation** Oxbow Historic Trash Dump Combo Prehistoric/Historic Pelican Lake Historic Univeristy/College

Other

Traditional Cultural Property

Historic Vehicular/Foot Bridge

Plains Side-notched

Scottsbluff

3. Attaching Photos and Maps

Supporting photographs, maps, and other figures referenced in Section 7 of the CSR/AER Form need to be included with the site record form according to the following guidelines. To accommodate the wide variety of technology used to collect and create supporting images, users can create attachment pages using the software/method of their choosing. The following guidelines and sample pages provide a template to ensure consistent formatting and complete information about the images.

Final attachment pages should be saved in PDF format and combined with a PDF of the completed CSR or AER form.

For more detailed mapping and photography standards, please review *Guidelines and Procedures: A Comprehensive Guide to Consulting with Montana SHPO*.

Photo Guidelines

At a minimum, the following photos should be included with a CSR/AER Form:

- 1. **Overview** of the site.
- 2. **Four Directional Views** of the site (e.g., N, W, S, E), or exterior elevations of historic structures.
- 3. **Features and Details** referenced in the narrative, such as a building foundation, architectural details, construction techniques, diagnostic artifacts, damage or vandalism, and natural exposures used to evaluate subsurface potential.

Photos captions should include:

- Unique photo name/number
- Photo description
- Photographer
- Date

Map Guidelines

At a minimum, the following maps are required with a site record form:

- 1. **Site Overview / Location Map** Topographic map at 1:24,000 scale. Provide a PDF and accurate GIS shapefiles that clearly show the boundary of the site as a polygon. If the site is linear such as an irrigation ditch or road, add a buffer along the centerline of the feature to visualize its width.
- 2. **Feature Boundaries Map**: For sites with more than three features, provide a map showing the boundary locations for individual features within the larger site boundary, and including a legend that clearly identifies each feature.

Maps should include:

- Unique Map Name/Number identifying the map as an "overview" or "feature" map
- North Arrow indicating map orientation
- Map Scale in the 1:XXXX format
- **Scale Bar** to measure distances on the map in either imperial or metric units
- **Site Name** or field designation exactly as shown on the associated CSR or AER Form.
- Legal Location (TRS) of the site. Reference section 2 of the CSR/AER Form for multiple legal locations.
- **Site and Feature Boundaries:** Clearly show the boundary of the site and features as polygons. Add a buffer to the center line of linear features such as irrigation ditches or roads.
- DO NOT INCLUDE a project or survey area map.

Photo Attachment (Sample)

PHOTO 1. Overview of site (24XX####), looking North. Photo by J Doe, 6/24/2022

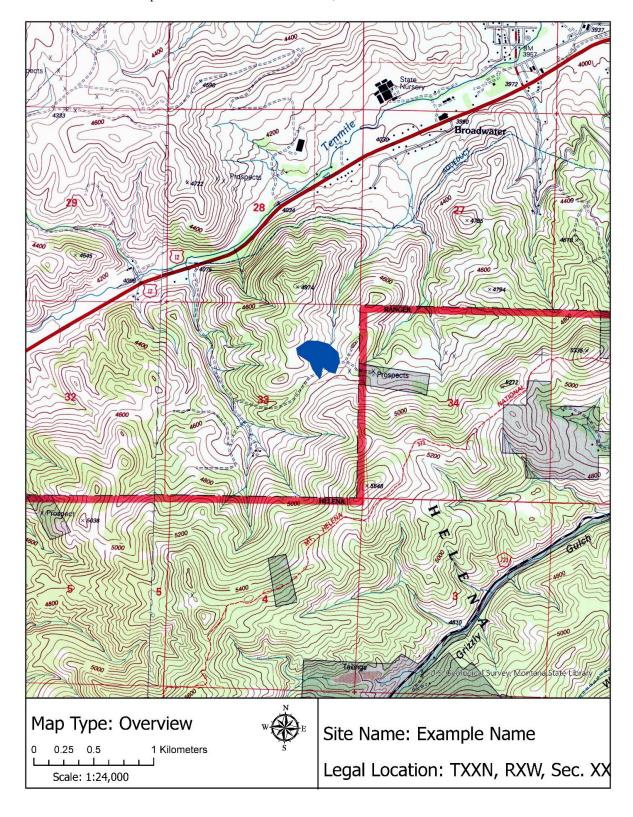


PHOTO 2. Looking NW at Feature 1, Site (24XX####). Photo by J Doe, 6/24/2022

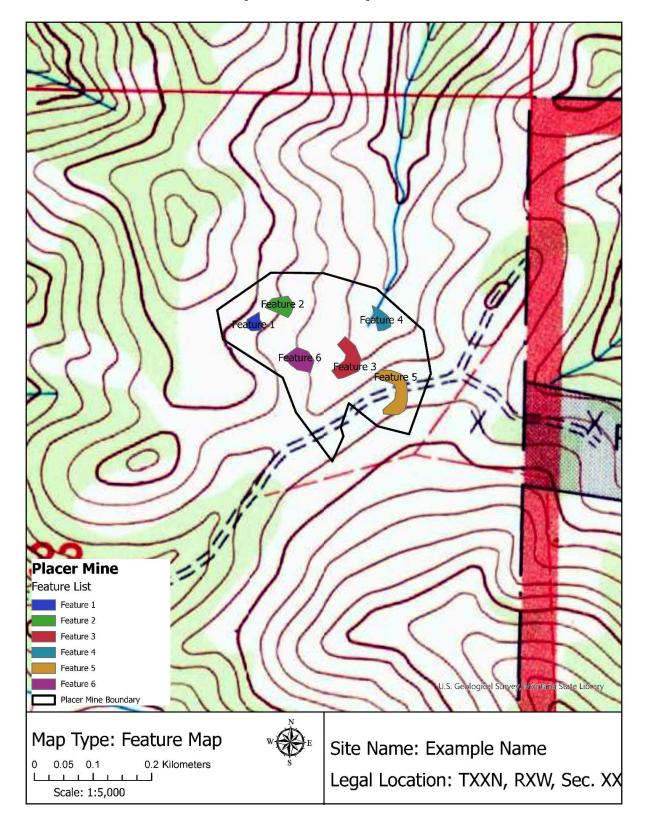


Map Attachment (Sample)

MAP 1: Site overview / location map for site name 24XX#### at 1:24,000 scale. T1N R6W S3NW



MAP 2: Boundaries and locations for six features at [site name and number] at 1:5,000 scale. T XN R XW S.X

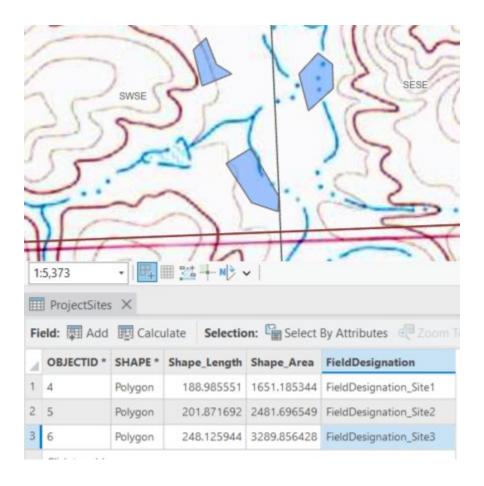


3. Creating GIS Shapefiles

Submission of an accurate GIS shapefile of the site boundary is required to receive a Smithsonian Number. Google Earth .kml and .kmz files are also accepted.

- 1. Use GIS software to produce an accurate polygon site boundary. Polygon GIS data is preferred but Line GIS data is accepted for linear features. Point GIS data is not accepted. If GIS software is unavailable, use Google Earth to create a .kml or .kmz file.
- 2. If submitting multiple sites for Smithsonian Numbers, please submit one polygon GIS shapefile that contains all the site boundaries identified by their unique Field Designation and/or Site Name. There is no need to export each site boundary into an individual shapefile. One GIS shapefile containing all geographic site information is preferred. SHPO does not collect GIS attribute data so only the FieldDesignation/Site Name field is required.
- 3. When submitting GIS files for Smithsonian Number assignment, only a polygon shapefile containing site boundaries should be submitted shapefiles for Project APE, Inventory Area, Site Features, etc. should not be submitted at this stage.
- 4. The GIS polygon site boundary must be identical to the site boundary depicted on the CSR/AER Form site map.

Example of one (1) GIS polygon shapefile containing three (3) site boundaries identified by their unique FieldDesignation Number



Creating a KMZ with Google Earth Pro

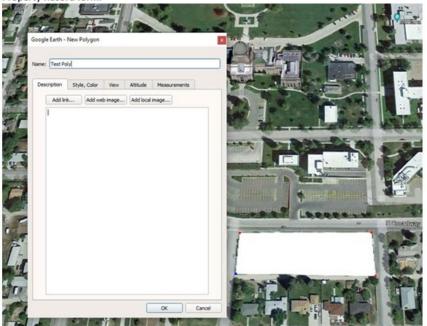
1. Download Google Earth Pro from the following link or searching via google.

https://www.google.com/earth/download/gep/agree.html?hl=en-GB

- Open the program and find the location of the property/site you wish to create a GIS polygon for
- Select the "Add Polygon" tool from the banner above the display window to open the dialogue box.



4. A cursor will appear on the screen which will allow you to draw a polygon. You can also name the polygon in the pop-up box that appears when you select the tool. It is recommended that you name the created polygon in a way that you can tie it to its related site form or Historic Property Record form.



5. This process can be repeated to create multiple polygons.



7. Lastly save the file in the desired location.