



PA-SHARE Tutorial: SUBMITTING A FEDERAL HISTORIC TAX CREDIT PROJECT

This tutorial will teach users how to submit **federal** historic tax credit (HTC) projects using PA-SHARE. Use these instructions for **initiating** or **continuing** an HTC project.

Review the complete tutorial or navigate to a specific section by hovering over an entry in the Table of Contents and following the instructions.

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Overview

Starting August 15, 2023, federal Rehabilitation Investment Tax Credit (also known as historic tax credit) applications must be submitted to PA SHPO through [PA-SHARE](#). The National Park Service (NPS), the federal agency that administers this program, has transitioned to an electronic review process and is no longer accepting hard copy (paper) submissions after this date. PA SHPO manages this federal program in Pennsylvania.

Please note that the process for submitting applications and supporting materials has changed but the historic tax credit program itself has not. PA SHPO will continue to review applications and forward to NPS for final approval.

Applicants will use PA-SHARE to submit materials to PA SHPO in two ways based on whether they are initiating or continuing their project review:

If you are initiating a federal tax credit project review with a Part 1 or Part 2 application:

Project reviews are initiated through the Federal Tax Credit wizard on the Submit page.

A review is initiated with the submission of a Part 1 or Part 2 application, depending on the property's National Register of Historic Places status. Applicants can [find](#) their property's National Register status in PA-SHARE.

- Part 1 applications are required if the property is in a listed National Register or certified local historic district, if the property or historic district is not yet individually listed in the National Register, or if the property is already listed in the National Register but there is more than one building on the tax parcel.
- If a property is a single building already individually listed in the National Register of Historic Places, a Part 1 application is not required. Applicants will initiate their project review with a completed Part 2 application.

If you are continuing a federal tax credit project with a Part 2, Amendment, or Part 3 application:

After the initial submission through PA-SHARE to create the federal tax credit project, applicants will use the Project Supplement wizard, not the federal tax credit wizard, to submit the remainder of the application for review. This includes:

- Part 2 application, if the project was initiated with a Part 1 application.
- Part 3 application, upon completion of the project.
- One or more amendments, to provide additional information about or changes to a Part 1, Part 2, or Part 3 application.
- Resubmission of an application part or amendment.

Before beginning your submission, it is important to understand that the information requested is important to PA SHPO's review and incomplete information may lead to delays.

NOTE: If a project was initiated through a hard copy (paper) submission, all subsequent submissions must be through PA-SHARE. Projects started on paper will not continue on paper.



Before You Begin

We recommend that you review this tutorial before beginning your submission. Your PA-SHARE session will timeout after 30 minutes of inactivity and any unsaved changes will be lost. We recommend saving the information you enter after completion of each section.

Request a Determination of Eligibility, if necessary

If your tax credit project involves a property not yet listed in the National Register of Historic Places, applicants are **very strongly encouraged** to submit a [Determination of Eligibility \(DOE\) request](#) to PA SHPO and receive the DOE letter *prior* to initiating their federal tax credit project in PA-SHARE.

PA SHPO will not complete Part 1 reviews for projects requesting “preliminary determination for individual listing” or “preliminary determination of contributing status in a potential historic district” unless a Determination of Eligibility (DOE) review has been completed within the last 5 years. Submitting and receiving a DOE *before* initiating your tax credit project review will avoid delays in your project.

Complete the NPS Tax Credit Form(s)

The project’s Historic Preservation Certification Application forms (cover sheets) should be completed and supporting materials assembled *before* beginning the PA-SHARE submission. Information from the project forms will be used in completing the online submission and applicants will be required to upload PDFs of the forms before they can submit to PA SHPO.

All parts of the federal historic tax credit application and instructions for completing the application are available online [here](#). Be sure to use the NPS-mandated naming conventions when creating your application materials.

Gather Basic Information about the Historic Property

You will be required to update an existing historic resource record or create a new one when you initiate a project review in PA-SHARE. This includes a current photograph and some basic information about the historic property being rehabilitated. This is required for all projects, even if the building is already a single building listed in the National Register of Historic Places.

PA SHPO’s [Worksheet for Recording Buildings in Pennsylvania](#) is a useful tool for collecting the required information.

Review the Electronic Submission Requirements

NPS and PA SHPO have developed the following requirements for submitting applications and supporting materials electronically:

- Applicants must use the most recent version of the [NPS application forms](#). These forms can be found on the NPS website.
- Application forms must include one of the following types of signature: [Adobe digital ID](#) or an original signature that has been scanned as a .jpeg (or other image) file. Typed signatures in a different font will not be accepted.
- All materials must be submitted as PDFs. Instructions, like [these](#), are available online. Application files must not be larger than 70 MB in size.



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- Application files must be saved using the [NPS-required naming conventions](#).
- Application parts must be saved as *individual* files. Cover sheets, narratives, site plans/photo keys, photographs, existing conditions drawings, and proposed work drawings should not be combined.
- Photographs must follow [NPS guidelines](#) for formatting and captions. Photographs should be submitted in one PDF file and not uploaded as individual jpegs through PA-SHARE. If you are submitting a large number of photographs, consider separating them into two or more files. For example, interior and exterior or by building or resource for large properties.
- Drawing files must be flattened when saving as a PDF. Existing and proposed floor plans and elevations must be saved in separate PDF files. If you are submitting a large number of drawings, consider dividing them into two or more files. For example, existing conditions – site plan and elevations, existing conditions – floor plans and sections, proposed work – site plan and elevations, and proposed work – floor plans and sections.
- Applicants must submit a [transmittal log](#) listing all documents submitted electronically at one time. The preferred format is as a PDF, but Word versions will be accepted.

Please contact PA SHPO with any questions about these requirements. PA SHPO will return incorrectly named or formatted files. **Failing to follow these requirements may result in delays to your project.**

NPS Guidance

NPS has developed file- and photo-naming conventions and instructions on organizing files for electronic submission. All electronically submitted applications must follow these conventions and instructions. Applicants should download these PDF files for reference in preparing materials for electronic submission.

- [Applicant and Project Contact Electronic Submission Workflow](#)
- [Electronic File Format Standards and File Naming Conventions](#)
- [Photo Naming Conventions, JPEG Requirements and Photo Sheet Examples](#)
- [Transmittal Log Examples](#)
- [Responding to NPS Holds and Uploading Files to the HPCA Submission Site](#)

Supporting Materials

In addition to this tutorial, users will find these supporting materials helpful:

- [Determination of Eligibility \(DOE\) request](#) tutorial
- [Adding an Above Ground Resource to PA-SHARE](#) tutorial
- [Understanding PA-SHARE's External User Queues](#) tutorial
- [Guidelines for Recording and Evaluating Buildings in Pennsylvania](#)
- [Worksheet for Recording Buildings in Pennsylvania](#)

PA SHPO has also developed the [checklist](#) at the end of this tutorial to help you prepare your projects for electronic submission through PA-SHARE.



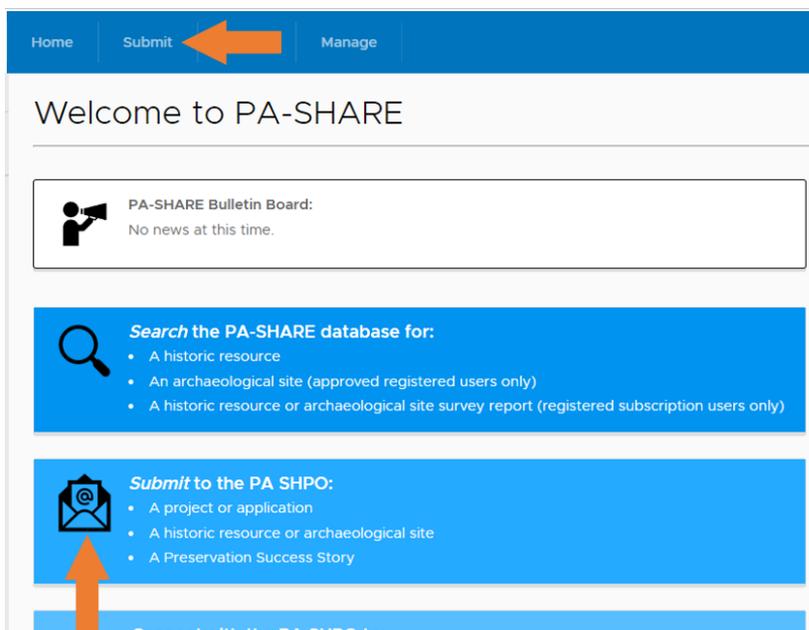
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Initiating A Federal Historic Tax Credit Project

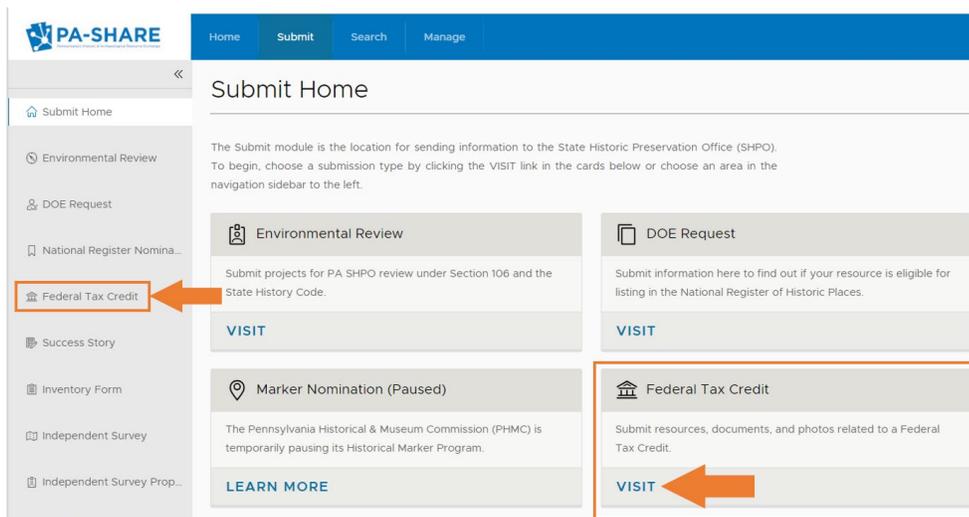
Initiating, or starting, a federal historic tax credit (HTC) project is done through the Federal Tax Credit wizard on PA-SHARE's Submit page.

Projects are **initiated** with a Part 1 application or Part 2 application, depending on the historic property's National Register status.

If you are submitting the next part of your federal tax credit application or an amendment, resubmitting an application part, or responding to a more information request, please see the instructions for [continuing a tax credit project](#).



From the Home Screen, click on the Submit button at the top of the screen or on the submit icon in the "Submit to the PA SHPO" blue tile.



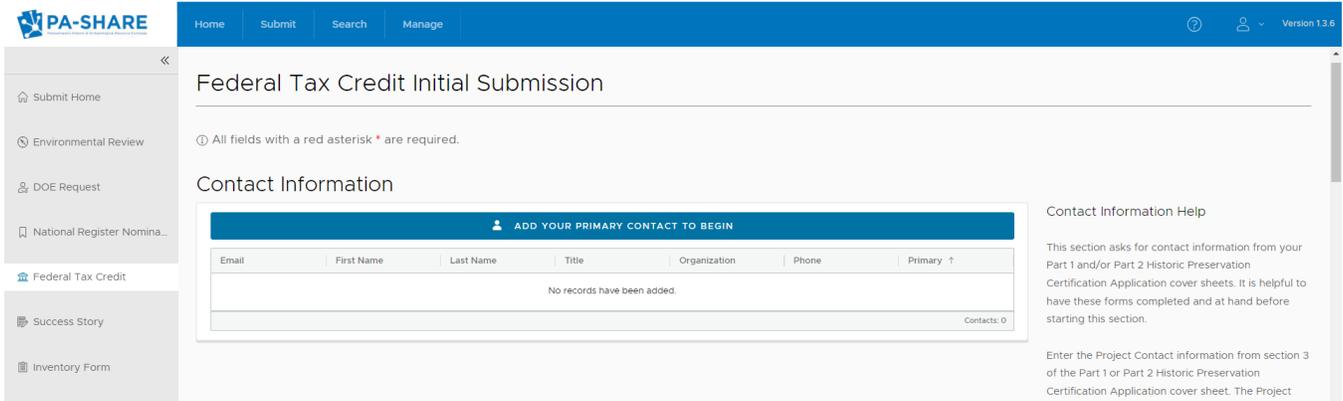
Once the Submit page opens, find the Federal Tax Credit wizard.

Click "Federal Tax Credit" from the navigation bar on the left OR "VISIT" on the "Federal Tax Credit" card to open the wizard.



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This is what the Federal Historic Tax Credit Initial Submission screen will look like when it opens in PA-SHARE:



Please note the following tools for completing your submission:

Contact Information Help

Please enter the contact information for the primary contact person for this project, as well as any other persons who should receive further communications about the project. The accuracy of this information is extremely important as all communication and correspondence regarding the review of this project will be sent to this person.

There is on-screen help for each of these sections on the right side of the screen.

i All fields with a red asterisk * are required.

Project Name: *



Those fields required to save a project are marked by a red asterisk.

VIEW DELETE

Project Resources Help

Please click the "add resource" button to add a resource to be evaluated. You will be guided through the process of entering the location, information, photos, and other relevant documentation for the resource. You will attach a narrative, statement of significance, photographs, and other attachments to the resource screen.

SAVE AND CONTINUE

FINISH LATER

SUBMIT TO SHPO

Three actions buttons will always be visible at the lower right corner of your screen. They will be anchored here even as you scroll down the screen.

They will be gray and inactive (meaning gray not blue) until a Project Contact is entered.

Once a Contact is entered, the buttons will be blue and active:

- Save and Continue allows you to save your work as you go along. **NOTE:** Your session will timeout after several minutes of



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inactivity and any unsaved changes will be discarded. Save the information you enter after completion of each section.

- Finish later allows you to save your work and return to PA-SHARE to finish up later. **NOTE:** You must first click “Save and Continue” before “Finish Later”.
- Submit to SHPO should be used when you are finished entering your project.

Contact Information

At least one contact is required to begin your submission. Click on the blue “Add Your Primary Contact To Begin” button.

Federal Tax Credit Initial Submission

① All fields with a red asterisk * are required.

Contact Information

Email	First Name	Last Name	Title	Organization	Phone	Primary ↑
No records have been added.						
Contacts: 0						

Enter the Project Contact information from section 3 of the Part 1 or Part 2 Historic Preservation Certification Application cover sheet. The Project Contact should be designated as the Primary Contact.



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Add Contact Information

Do you want to use your organization's address book?

Email *
e.g. jane.doe@gmail.com
200 characters remaining

First Name *
e.g. Jane
50 characters remaining

Last Name *
e.g. Doe
50 characters remaining

The “Add Contact Information” screen will appear.

Use this screen to enter the information for the primary contact person for the project. This is the individual that will receive all communication regarding the review of this project via email.

NOTE: If you have completed your User Profile, the Contact Information fields will automatically populate with your information. If you have a Pro or Business account, you can choose to use saved contact information from your Address Book.

Email * e.g. jane.doe@gmail.com 200 characters remaining	Phone #2 xxx-xxx-xxxx 12 characters remaining
First Name * e.g. Jane 50 characters remaining	Address Line 1 * e.g. 123 Main Street 50 characters remaining
Last Name * e.g. Doe 100 characters remaining	Address Line 2 e.g. Suite 300 50 characters remaining
Title e.g. Director 100 characters remaining	City * e.g. Springfield 50 characters remaining
Organization e.g. ACME 50 characters remaining	State: PA ▾
Phone #1 xxx-xxx-xxxx 12 characters remaining	ZIP * 00000-0000 Enter a zip code

You will need to scroll down the screen to see all of the available fields.

Required fields on the Add Contact Information screen include Email, First, and Last Name, Address, City and Zip Code.

It is helpful if you complete the non-required fields as well with your title, organization, and at least one phone number.

When you are finished data entering the primary contact information, click “Save”.

When you return to the main data entry screen, your contact information will appear:



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Contact Information

ADD A NEW CONTACT VIEW EDIT MAKE PRIMARY DELETE

Email	First Name	Last Name	Title	Organization	Phone	Primary ↑
ssplain@pa.gov	Shelby	Splain		Test		Yes
						Contacts: 1

Contact Information

ADD A NEW CONTACT

Click “Add a New Contact” to enter the Project Applicant information from section 4 of the Part 1 or Part 2 Historic Preservation Certification Application cover sheet.

NOTE: Do not mark the Project Applicant as the primary contact.

All additional contacts will also receive email communication regarding the review of the project from PA-SHARE.

VIEW EDIT MAKE PRIMARY DELETE

Phone	Primary ↑
	Yes
	No
Contacts: 2	

You can view, edit, or delete a contact using the button at the upper right corner of the Contact Information section.

To change the Primary Contact, click on the person’s name (the line will turn blue) and click “Make Primary. One person must be the primary contact.

The primary contact should be the Project Contact from section 3 of the Part 1 or Part 2 Historic Preservation Certification Application cover sheet.



Project Overview

The Project Overview section is where you will enter basic information about the federal historic tax credit project review you are initiating.

Project Overview

Project Name * ←

e.g. Springfield Municipal Center

255 characters remaining

Project Description * ←

Project Description

1000 characters remaining

Enter the Project Name. The Project Name should be the same as the historic property name in section 1 of the Part 1 or Part 2 Historic Preservation Certification Application cover sheet.

Enter the Project Description. Provide a brief 1-2 sentence summary of the historic tax credit project.

Include the property's historic or current use and the use after rehabilitation; if residential, indicate number of units and type of housing.

For example, "Rehabilitation of former high school into 15 affordable and market rate senior housing apartments."

Which part of the Federal Tax Credit are you submitting? * ←

Part 1

Part 2

Part 1 and Part 2

Select one of the options

What are you submitting? Click in the circle to identify if you are initiating your review with a Part 1 application, Part 2 application, or both.

Additional fields will open depending on your selection.

Which part of the Federal Tax Credit are you submitting? *

Part 1 ←

Part 2

Part 1 and Part 2

Select one of the options

Part 1 Nature of Request * ←

Certification that the building contributes to the significance of the above-national historic district

Certification that the building contributes to the significance of the above-national historic district

Certification that the building does not contribute to the significance of the above-national historic district

Preliminary determination for individual listing in the National Register

Preliminary determination that a building located within a potential historic district

Preliminary determination that a building outside the period or area of significance

If you selected **Part 1**:

The "Part 1 Nature of Request" field will open. Hover over the line and click to see a list of choices.

Select the option that matches the one you indicated in Section 2 of the Part 1 cover sheet.



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Which part of the Federal Tax Credit are you submitting? *

- Part 1
 Part 2 
 Part 1 and Part 2

Select one of the options

Date of building *

e.g. 1970

Enter the year the building was constructed

Number of buildings in project *

Input the number of buildings

Start date (estimated) *

MM/dd/yyyy



Select a date

If you selected **Part 2**:

A series of 16 fields will open. These fields are the same as those in Section 2 of the Part 2 cover sheet.

Enter the information from your Part 2 cover sheet.

NOTE: Only select the Part 2 option if the property is already individually listed in the National Register.

Which part of the Federal Tax Credit are you submitting? *

- Part 1
 Part 2
 Part 1 and Part 2 

Select one of the options

Part 1 Nature of Request *

Date of building *

e.g. 1970

Enter the year the building was constructed

Number of buildings in project *

Input the number of buildings

If you selected **Part 1 and Part 2**:

The Part 1 Nature of Request and 16 Part 2 fields will open. These fields are the same as those in Section 2 of the Part 1 and 2 cover sheets.

Enter the information from each cover sheet.



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Project Location

This section captures information about the project location and property being rehabilitated.

Enter the full Project Address. This includes the street address, city, and zip code. Once this information is entered, the “Zoom Map to Project Address” button will be activated. Click to focus the map on the address you entered.

Project Location

The screenshot shows a form with three input fields: "Project address *", "Project City *", and "Project Zip *". The "Project address" field contains "136 N Main Street" with "238 characters remaining". The "Project City" field contains "Sellersville" with "38 characters remaining". The "Project Zip" field contains "18960-0000" with "Enter a zip code" below it. A "State:" dropdown menu is set to "PA" with "0 characters remaining". A blue button labeled "ZOOM MAP TO PROJECT ADDRESS" is positioned below the form, with an orange arrow pointing to it from the right.

Once you click the Zoom button, you will see a blue X appear on the map along with a window showing the address you entered. Close the window to see the map.



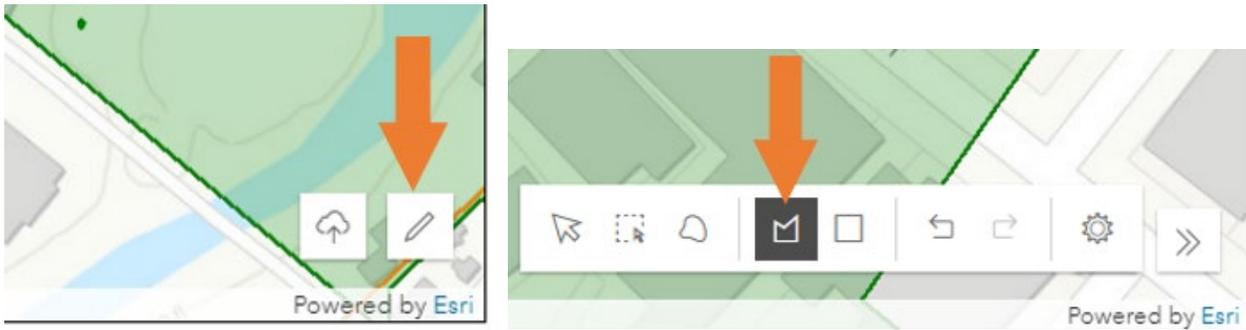
You can zoom in to the location by hovering over the map with your mouse and using the scroll wheel or using the “+” and “-” buttons in the upper left corner. Use the top button in the upper right corner to change the base map, use the middle button to turn layers on or off, and the bottom button as the map key.



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Next, you will need to draw the project boundary on the map. For tax credit projects, this is the property boundary and will be the current tax parcel. **Do not draw the boundary as the outline of the building.**

Click the pencil icon in the lower right corner to open the map tools (image at left). When the map tools opens, it will look like a horizontal bar with different shapes (image at right).



Click on the polygon icon in the center of the bar. It will be the 4th icon from the left and if you hover over it with your mouse, it will read “draw a polygon.” You can use any of the tools to draw the property boundary on the map, but the polygon tool will be the easiest.

Zoom in on the map until the tax parcel lines are visible and find the boundary for your property. To begin drawing the boundary, go to a corner on the map and left click. Place the second and additional points by moving your mouse to the next point and left clicking. Drawn lines will be solid and lines in progress will be dashed.





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When you complete the boundary polygon, it will be shown with a thick black line and dark gray fill. Once the boundary is drawn, the table below the map will update to show the municipality and county the property is in.



Municipalities Containing the Resource	
Municipality	County
Sellersville	Bucks

Resources within the Project Area

The section gives you information about historic resources already recorded in PA-SHARE and requires you to provide information about the historic property being rehabilitated, either by updating an existing resource or submitting a new one.

You are required to update or add a new resource so that PA-SHARE can associate the tax credit project with the correct historic property. If a record for an individual resource does not exist, then one must be created. This also assists PA SHPO in maintaining an up-to-date inventory and improving our data quality.

Once the boundary is drawn on the map, the “Previously-Identified Above Ground & District Resources” grid is automatically populated with a list of resources in PA-SHARE that intersect with the property boundary.

This grid may be empty if there are no resources already recorded in PA-SHARE or it may include many entries depending on the size of the property (like a school campus with many buildings) or if it is located in a municipality that has both a local historic district and a National Register historic district.

DO NOT SELECT THE HISTORIC DISTRICT THAT INCLUDES THE PROPERTY AS THE RESOURCE TO UPDATE. This will require you to update the historic district record and would not create an individual record for the property being rehabilitated. PA SHPO staff will associate the individual historic resource with the historic district it belongs to after the tax credit project has been submitted.



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If you see a specific entry for the individual property being rehabilitated, you will [update the existing record](#). Expect this for properties:

- already listed in the National Register of Historic Places,
- for which you have already requested a Determination of Eligibility (DOE),
- that have already been recorded, regardless of their National Register status, or
- in a listed or local certified historic district with their own resource number (##RE#####).

NOTE: You will be required to update a property in PA-SHARE *even if it is already listed* in the National Register of Historic Places. You will be updating the data in PA-SHARE, not changing the official nomination form. We do not expect you to submit a new National Register nomination. PA-SHARE data is dynamic record of a property while the National Register form is static documentation of a property’s appearance at the date it was officially listed.

Example 1: Seller’s Tavern at 136 N. Main Street

Resources within the Project Area

Previously-Identified Above Ground & District Resources in the Project Area

Update Info	View	Resource Number	Resource Type	Resource Name	Address	Eligibility
		1979RE00742	Above Ground	Seller’s Tavern (Washingt...	136 N Main St.	Eligible
		2005RE00187	District	Sellersville Historic District		Eligible

Note: In the original image, an orange arrow points to the plus icon in the first row, another orange arrow points to the 'Above Ground' resource type in the first row, and a red arrow points to the 'District' resource type in the second row with a 'No!' callout. A 'Yes!' callout is positioned near the 'Above Ground' resource type.

In example 1, the property being rehabilitated is the Seller’s Tavern at 136 N. Main Street. It is also within the boundaries of the Sellersville Historic District. Seller’s Tavern already has a record in PA-SHARE, so the next step is to update its property information.

If you do **not** see a specific entry for the individual property, you will move to the next grid to [add a new resource](#) (Example 2). Expect this if the property being rehabilitated is:

- in a listed or local certified historic district and does not have its own resource number (##RE#####), or
- has never before been recorded in PA-SHARE.

IMPORTANT: If your tax credit project involves a property not yet listed in the National Register of Historic Places, applicants are **very strongly encouraged** to submit a [Determination of Eligibility \(DOE\) request](#) to PA SHPO and receive the DOE letter *prior* to initiating their federal tax credit project in PA-SHARE. If a DOE has been submitted, then the resource will be one of the options presented in the “Previously-identified” grid.

Example 2:



Resources within the Project Area

Previously-Identified Above Ground & District Resources in the Project Area

Update Info	View	Resource Number	Resource Type	Resource Name	Address	Eligibility
⊕	👁	2005RE00187	District	Sellersville Historic District		Eligible

No! ↑

Above Ground Building Resources and/or District Resources: 1

Newly-Identified Resources and Previously-Identified Resources with Updated Information *

ADD ABOVE GROUND BUILDING RESOURCE ←

ASSIGN TO DISTRICT EDIT VIEW DELETE

Type	Subtype	Resource Name	Address	Status
No records have been added.				

In example 2, the property being rehabilitated is the Odd Fellows Building at 201 N. Main Street. It is within the boundaries of the Sellersville Historic District but there is no individual record for the property. It has never been recorded before or added to PA-SHARE, so the next step is to create a new record for the Odd Fellows Building.

Updating an Existing Resource

For step-by-step instructions about *updating* resource information, refer to the “[Adding an Above Ground Resource to PA-SHARE](#)” tutorial. Instructions for updating an existing resource record begin on page 25.

As part of this process, you will need to provide missing or update information in the Building Resource Details screen. You are required to:

- provide a photograph and recorder information.
- update those fields for which no information exists for the original resource record.
- update those fields where changes to the property have been made since the original resource record.

To begin, click the “Update Info” button in the “Previously-identified Resources” grid.

Previously-Identified Above Ground & District Resources in the Project Area

Update Info	View	Resource Number	Resource Type	Resource Name	Address	Eligibility
⊕	👁	1979RE00742	Above Ground	Seller's Tavern (Washingt...	136 N Main St.	Eligible
	👁	2005RE00187	District	Sellersville Historic District		Eligible

↑

A new window will open for you to enter building resource details. This online form includes two sections: Identification and Evaluation. You will only need to provide information in the Identification section. The Identification section includes four categories in this order:

- Mapping
- Photographs
- Location Information
- Summary Information



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You will begin by adding the property’s address and boundary and uploading a current photograph. Remember to frequently click the “Save and Continue” button at the bottom right corner of your screen so you do not lose any information you’ve entered.

Building Resource Details

ⓘ All fields with a red asterisk * are required. Use the “Save and Continue” button periodically to save while continuing to work on the resource data entry. Use the “Save and Close” button to save the form and return to the main submission page. Use the “validate” button to verify that all required fields are complete. Missing required fields will be outlined in red.

▼ Identification: Enter this information to create or update resource information.

Mapping

Can you identify the location using an address? NO YES

Location Description
 e.g. On a knoll on the north bank of the Allegheny River, north of railroad bridge
 1000 characters remaining

 **ADD AN ADDRESS *** EDIT MAKE PRIMARY DELETE

Address	City	Zip Code	Primary
No records have been added.			
			Address: 0

Resource Boundary *

CLOSE VALIDATE SAVE AND CONTINUE SAVE AND CLOSE

Address

If you can identify the location with a street address, provide it here and draw or upload the resource boundary to the map.

See below for instructions on how to draw or upload the resource boundary. The location description is optional.

Mapping Help

Using the two tools in the lower right-hand corner of the map, you can sketch the APE and/or LOD on the map OR upload a zip file of a Shapefile.  Click on one of the buttons below to learn more about a

Carefully work through all of the fields included in the Building Resource Details screen to the best of your ability. Update the information to reflect the property’s current appearance. Depending on the thoroughness of the data already recorded, you may not need to enter or change any information, or you will need to enter or change all of the information.

Red asterisks indicate required information. This is PA SHPO minimum record for resources recorded in PA-SHARE. This includes:

Resource name: This will be the same name entered in Section 1 of the Part 1 or Part 2 application form.

Resource classification: This will be either a building or structure.

Historic function: Select the building’s original historic function.

Current function: Select the building’s current function. This is the same as the “Use before Rehabilitation” from the Part 2 application form.

Foundation material: If there are multiple materials, select the most prominent.

Wall material: If there are multiple materials, select the most prominent.

Roof material: If there are multiple materials, select the most prominent.

Architectural style: Select the style that most accurately reflects the building’s appearance.

Year built: Enter the year built. This is the same as the “Date of Construction” from the Part 2 application form.



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Type of date: Indicate if the date is exact, circa, or a range.

Recorder contact: Click the blue person icon to open your contact information page.

Recorder reason: Select "Tax Credit" as the recording reason.

When you have finished the Identification section, click "Save and Continue" and then "Validate" to make sure all of the required fields have been addressed. If there are no errors, click "Save and Close."

This will close the Building Resource Details window and return you to the tax credit submission. The resource you updated will now be shown in the "Newly-Identified and Previously-Identified Resources" grid.

Resources within the Project Area

Previously-Identified Above Ground & District Resources in the Project Area

Update Info	View	Resource Number	Resource Type	Resource Name	Address	Eligibility
		1979RE00742	Above Ground	Seller's Tavern (Washingt...	136 N Main St.	Eligible
		2005RE00187	District	Sellersville Historic District		Eligible

Above Ground Building Resources and/or District Resources: 2

Newly-Identified Resources and Previously-Identified Resources with Updated Information *

[ADD ABOVE GROUND BUILDING RESOURCE](#) ASSIGN TO DISTRICT EDIT VIEW DELETE

Type	Subtype	Resource Name	Address	Status
<input type="checkbox"/>	Above Ground	Building	Washington House	136 N. Main Street, Sellersville... Unprocessed

Resources: 1

Adding a New Resource to PA-SHARE

For step-by-step instructions about adding *new* above ground resource information in a Building Resource Details screen, please refer to the [Adding an Above Ground Resource to PA-SHARE](#) tutorial; instructions for adding a new resource begin on page 6.

To begin, click the "Add Above Ground Building Resource" button in the "Newly-identified Resources" grid.

Newly-Identified Resources and Previously-Identified Resources with Updated Information *

[ADD ABOVE GROUND BUILDING RESOURCE](#) ASSIGN TO DISTRICT EDIT VIEW DELETE

Type	Subtype	Resource Name	Address	Status
No records have been added.				

Resources: 0

A new window will open for you to enter building resource details. This online form includes two sections: Identification and Evaluation. You will only need to provide information in the Identification section. The Identification section includes four categories in this order:



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- Mapping
- Photographs
- Location Information
- Summary Information

You will begin by adding the property’s address and boundary and uploading a current photograph. Remember to frequently click the “Save and Continue” button at the bottom right corner of your screen so you do not lose any information you’ve entered.

Building Resource Details

ⓘ All fields with a red asterisk * are required. Use the “Save and Continue” button periodically to save while continuing to work on the resource data entry. Use the “Save and Close” button to save the form and return to the main submission page. Use the “validate” button to verify that all required fields are complete. Missing required fields will be outlined in red.

▼ Identification: Enter this information to create or update resource information.

Mapping

Can you identify the location using an address?

Location Description

e.g. On a knoll on the north bank of the Allegheny River, north of railroad bridge

1000 characters remaining

Address	City	Zip Code	Primary
No records have been added.			
Address: 0			

Resource Boundary *

Address

If you can identify the location with a street address, provide it here and draw or upload the resource boundary to the map.

See below for instructions on how to draw or upload the resource boundary. The location description is optional.

Mapping Help

Using the two tools in the lower right-hand corner of the map, you can sketch the APE and/or LOD on the map OR upload a zip file of a Shapefile. Click on one of the buttons below to learn more about a

Carefully work through all of the fields included in the Building Resource Details screen to the best of your ability. Enter the information that reflect’s the property’s current appearance.

Red asterisks indicate required information. This is PA SHPO minimum record for resources recorded in PA-SHARE. This includes:

Resource name: This will be the same name entered in Section 1 of the Part 1 or Part 2 application form.

Resource classification: This will be either a building or structure.

Historic function: Select the building’s original historic function.

Current function: Select the building’s current function. This is the same as the “Use before Rehabilitation” from the Part 2 application form.

Foundation material: If there are multiple materials, select the most prominent.

Wall material: If there are multiple materials, select the most prominent.

Roof material: If there are multiple materials, select the most prominent.

Architectural style: Select the style that most accurately reflects the building’s appearance.



PA-SHARE Tutorial: SUBMITTING A FEDERAL HISTORIC TAX CREDIT PROJECT

Year built: Enter the year built. This is the same as the “Date of Construction” from the Part 2 application form.

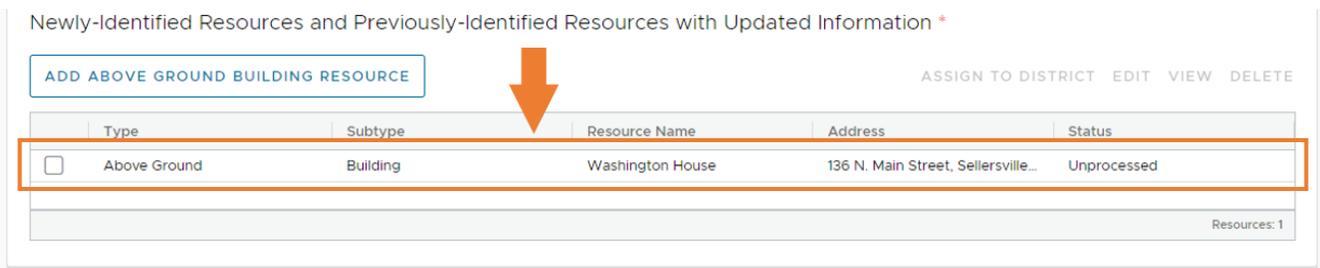
Type of date: Indicate if the date is exact, circa, or a range.

Recorder contact: Click the blue person icon to open your contact information page.

Recorder reason: Select “Tax Credit” as the recording reason.

When you have finished the Identification section, click “Save and Continue” and then “Validate” to make sure all of the required fields have been addressed. If there are no errors, click “Save and Close.”

This will close the Building Resource Details window and return you to the tax credit submission. The resource you entered will now be shown in the “Newly-Identified and Previously-Identified Resources” grid.



Documents

This is the last section to complete before submitting your federal tax credit project to PA SHPO. It includes two grids: attachments and photographs.

Attachments

You will upload PDFs of your tax credit application in the Add an Attachment grid. This includes:

- Part 1 and/or Part 2 tax credit application cover sheet, depending on how you are initiating project review
- Part 1 and/or Part 2 application narrative
- Part 1 or Part 2 photo sheets
- Photo key
- Elevation and floor plan drawings for existing (pre-rehabilitation) conditions
- Elevation and floor plan drawings for proposed work
- Supplemental information like product or treatment specifications, historic maps, etc.
- Transmittal log

Please refer to the [electronic submission requirements](#) and NPS’ naming conventions before uploading any materials to PA-SHARE.



Click the “Add An Attachment” button to begin.

You will repeat this process to add additional attachments.



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Attachment Detail

Attachment Source *
Choose value

Name/Title *
e.g. Report Name (required)
200 characters remaining

The Attachment Detail window will open.

Attachment Source: Select attachment source. Always choose “File from Local Disk” to upload a file from your computer (or shared network like SharePoint or common server).

Name/Title: Enter the name of the attachment using NPS’ naming conventions.

Select An Attachment Type *

Choose value

- Photograph
- Pre-decisional Materials
- Preservation/Managment Plan Profile
- Railroad Lineage
- Recordation
- Report
- Restricted Report
- Scanned NR File
- Sign In Sheet
- Site Plan
- Status Report
- Tax Credit Part 1**
- Tax Credit Part 1 Amendment
- Tax Credit Part 2**
- Tax Credit Part 2 Amendment
- Tax Credit Part 3
- Tax Credit Part 3 Amendment

Drop files here to upload

Select An Attachment Type: Select the “Tax Credit Part 1” or “Tax Credit Part 2” attachment type from the dropdown menu. Use this attachment type for all tax credit materials.

Once the last field is completed, the Select Files button at the bottom of the Attachment window will be activated.

Select files... Drop files here to upload

PA SHPO Annual Report 2020 FINAL.pdf
10.12 MB

Upload

Click the “Select Files” button to select the location of the file to be uploaded from your computer.

Once the file has been selected, the name and size will show in the space below.

Click “Upload” to add the attachment.

Once the attachment is uploaded, it will appear in the attachments grid. Select the attachment to view, edit, or delete.

ADD AN ATTACHMENT * VIEW EDIT DELETE

Attachment Type	Attachment Name	Date Created	Description
Tax Credit Part 1	Example	07/11/2023	

Attachments: 1



Photographs

You can upload a photo of the property being rehabilitated in the Add a Photo(s) grid. This is optional. **It does not replace** the photo sheets that are required for Part 1 and/or Part 2 applications. Please limit photos to no more than one or two photos of the property.



Click the “Add A Photo(s)” button to begin.

You will repeat this process to add another photograph.

Photo Detail

Photo Source *
Choose value

Name/Title *
Name/Title
200 characters remaining

Description *
Description
1000 characters remaining

Photo Date *
Photo Date
50 characters remaining

The photo detail window will open.

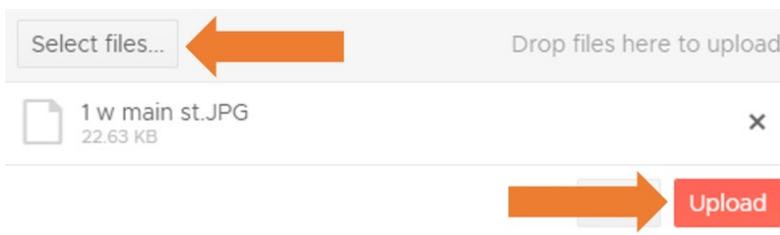
Photo Source: Select photos source. Always choose “File from Local Disk” to upload a file from your computer (or shared network like SharePoint or common server).

Name/Title: Provide a general descriptive name for the photo indicating what is shown, such as House, Exterior.

Description: Provide a more detailed description of what is shown in the photo, such as south elevation.

Photo Date: Provide the date the photo was taken. If the exact date is not known, provide an approximate date.

Once the last field is completed, the Select Files button at the bottom of the Photo Detail window will be activated.



Click the Select Files button to select the location of the file to be uploaded from your computer.

Once the photo has been selected, the photo name and size will show in the space below. Click “Upload” to add the photograph.

Once the photo is uploaded, it will appear in the photo grid. Select the photo to view, edit, or delete.



PA-SHARE Tutorial: SUBMITTING A FEDERAL HISTORIC TAX CREDIT PROJECT

ADD A PHOTO(S) VIEW EDIT DELETE

Image	Name	Date	Date Created	Description
	Washington House	July 2023	07/11/2023	Current photograph prior to rehabilitation

Photos: 1

Submit Your Project to the SHPO

Once you have completed each section, send your submission to the PA SHPO.



SAVE AND CONTINUE FINISH LATER **SUBMIT TO SHPO**

Click the Submit to SHPO button in the bottom right corner of your screen.

Missing Required Fields: Project Name, Description, Present Land Use, Past Land Use

SAVE AND CONTINUE FINISH LATER **SUBMIT TO SHPO**

If required fields were not completed, a red box identifying which fields are outstanding will appear above the buttons.

Close the red box by clicking the X in the upper right corner.

Project Overview

Project Name: *
e.g. Springfield Municipal Center

This field is required

Scroll to the top of the submission screen to find the sections with missing information.

They will be highlighted with a red box and a red exclamation point. These will disappear as you enter the information.

Thank you for your Submission

Submission Token: 2LRTP6AOGXOF

Information about your Submission has been transmitted by email to the Contacts you listed on the previous screen.

Please monitor your email and PA-SHARE for further actions required of you. For more information about what comes next and how to monitor the status of your Submission please review information in the [Help](#) documentation.

When your submission is complete, a window will appear with your submission token number.

This token number will also be sent to the primary contact on the project.



Continuing A Federal Historic Tax Credit Project

Continuing a federal historic tax credit (HTC) project is done through the Project Supplement wizard on PA-SHARE's Submit page.

Projects are **continued** when you need to send additional information to PA SHPO after you have initiated it in PA-SHARE using the federal tax credit wizard. This additional information includes:

- the next part of your federal tax credit application (Part 2 or Part 3),
- an amendment, or
- resubmitting an application part.

If you need to initiate, or begin, your federal historic tax credit project, please see the instructions for [initiating a tax credit project](#).

In most cases, you will continue your federal historic tax credit project by using the [Project Supplement wizard](#) on the PA-SHARE Submit page. You can use the Project Supplement wizard at any time without an explicit request from the PA SHPO. To do this, you will need to sign in to PA-SHARE and go to the Submit page.

In few cases, you will submit additional materials directly from a [PA-SHARE email](#). You will only use this option if PA SHPO is requesting or requiring additional information to complete our review. You will receive a system-generated email from PA-SHARE, and you will need to click a direct link in the email to access the Response Page.

Using the Project Supplement Wizard

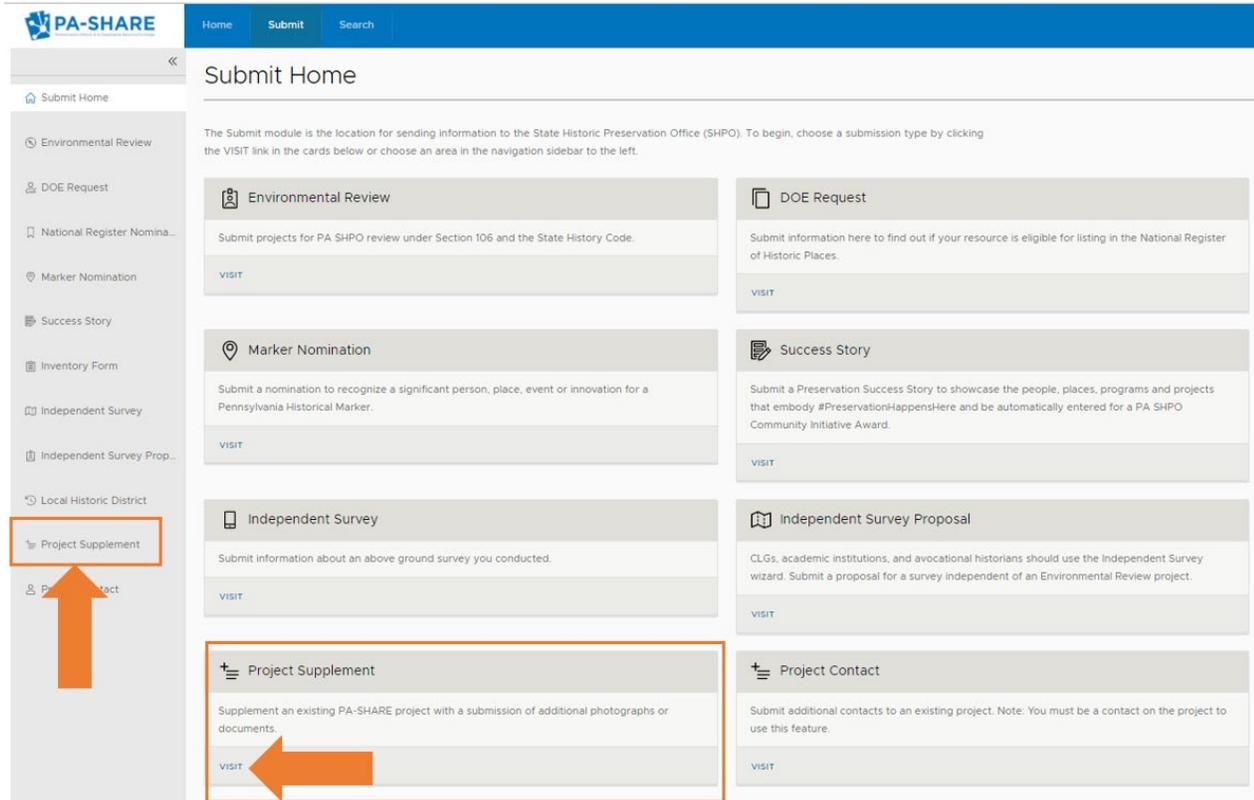
To use the Project Supplement wizard, you must be listed as a contact to the project. If you are not listed as a contact to the project, someone who is a contact can add you via the Project Contact wizard on the Submit screen. If necessary, you may contact the PA-SHARE Help Desk at pashare@pa.gov to request to be added as a project contact.

Once you sign in to PA-SHARE, you will see the Home screen. To go to the Submit screen, click the "Submit" button at the top of the screen or click on the icon in the second blue tile in the left column.

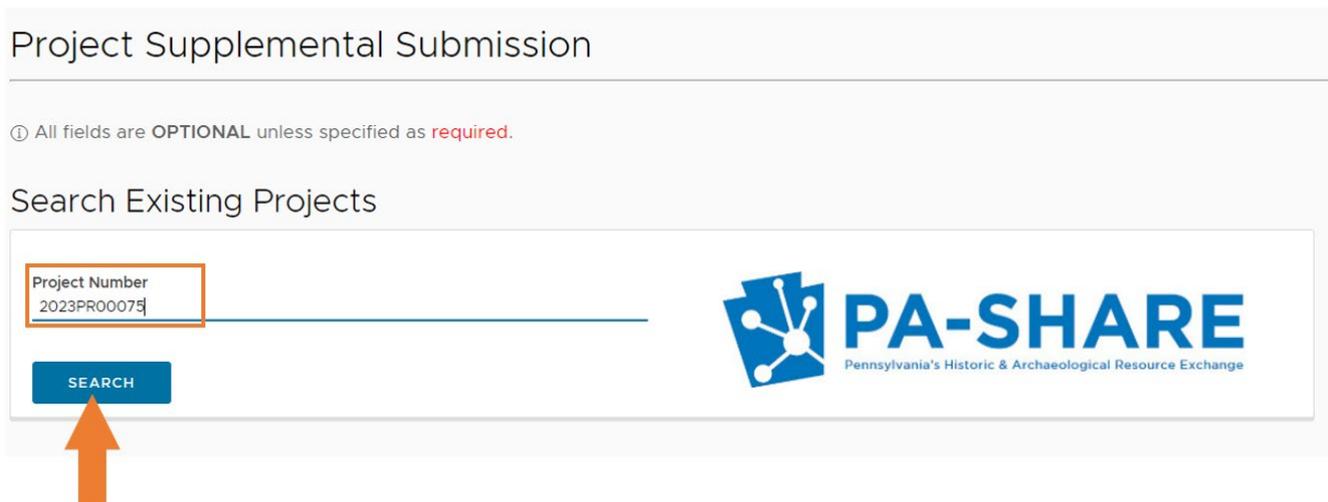


PA-SHARE Tutorial: SUBMITTING A FEDERAL HISTORIC TAX CREDIT PROJECT

From the Submit home screen, you can navigate to Project Supplement wizard by clicking “Project Supplement” from the gray navigation bar on the left side of the screen OR by clicking “VISIT” on the Project Supplement card.



This is how the Project Supplement Submission screen will look when it opens in PA-SHARE:



You will begin by entering the PA-SHARE Project Number for your federal historic tax credit project and clicking “Search.”



PA-SHARE Tutorial: SUBMITTING A FEDERAL HISTORIC TAX CREDIT PROJECT

You can find your project number from any email you received from PA-SHARE after submitting information or through a project search on the PA-SHARE Search screen. If you cannot locate your federal tax credit project number, you can also email PA SHPO historic tax credit staff at phmctaxcredit@pa.gov.

Once your project is located, the Project Supplemental Submission screen will expand.

Search Existing Projects

Project Number
2023PR00075

Search success! Please add information below and submit to SHPO. X

Project Supplemental Description *

1,000 of 1,000 characters remaining

PA-SHARE
Pennsylvania's Historic & Archaeological Resource Exchange

There are three sections to complete:

- Project Supplemental Description
- Project Documents
- Project Photos

Project Supplement Description *

1,000 of 1,000 characters remaining

Project Supplemental Description: Include a very brief description of the information being submitted.

Please be clear and concise when describing the information being submitted. PA SHPO uses this description to verify that additional information is being added to the correct project.

For example, "Washington House, Sellersville, Bucks County – Part 2 application. Submission includes: cover sheet, narrative, photo sheets, and drawings."



Project Documents

 ADD AN ATTACHMENT

Attachment Type	Attachment Name	D

Project Documents: You will upload PDFs such as:

- Part 2 or Part 3 tax credit application cover sheet
- Part 2 application narrative
- Part 2 or Part 3 photo sheets
- Photo key
- Elevation and floor plan drawings for existing (pre-rehabilitation) conditions
- Elevation and floor plan drawings for proposed work
- Supplemental information
- Transmittal log

Please refer to the [electronic submission requirements](#) and NPS' naming conventions before uploading any materials to PA-SHARE.

Be sure to select the correct tax credit application part from the drop down list in the attachment wizard.

Instructions for attachments can be found [here](#).

Project Photos

 ADD A PHOTO(S)

Image	Name

Project Photographs: Only submit individual photographs if necessary.

The preferred method of submitting photographs to PA SHPO for federal historic tax credit projects is a single PDF.

Instructions for photographs can be found [here](#).



PA-SHARE Tutorial: SUBMITTING A FEDERAL HISTORIC TAX CREDIT PROJECT

Accessing the Response Page from a PA-SHARE Email

If we have requested additional information to complete our review, you can submit the information through PA-SHARE from a link in your email. This email is system-generated.

To use this link, you must be listed as a project contact in PA-SHARE. We recommend signing in to PA-SHARE and having it open in your browser *before* clicking the link the in email. You will be directed to the SHPO Response screen.

Scroll down to the SHPO Requests More Information section. Click on the request so the line is highlighted in blue and then click “Process”.

Status	Type	Requested By	Description
Information Requested	New Attachment	Allison Davis	please submit more attachments

A window will open for you to enter the additional information:

Attachment Response

Description

Description

1000 characters remaining

Help

Please describe the contents of the submission to be reviewed.

Attachments

ADD AN ATTACHMENT VIEW EDIT DELETE

Attachment Type	Attachment Name	Date Created	Description
No records have been added.			

Attachments: 0

CANCEL SUBMIT TO SHPO

Provide a description or summary of your additional information.

Next, upload one or more attachments to address PA SHPO’s request for more information. Please refer to the [electronic submission requirements](#) and NPS’ naming conventions before uploading any materials to PA-SHARE. Instructions for attachments can be found [here](#).



Checklist for Submitting a Federal Historic Tax Credit Project using PA-SHARE



Federal Historic Tax Credits

Checklist for Submitting a Federal Historic Tax Credit Project using PA-SHARE

Overview

Starting August 15, 2023, federal historic tax credit applications must be submitted to PA SHPO using [PA-SHARE](#).

Use these questions to help you prepare your federal historic tax credit project for submission. Please refer to the PA-SHARE tutorial *Submitting a Federal Historic Tax Credit Project* for specific instructions.

Please note: Applicants are expected to follow NPS' instructions for naming, formatting, and submitting electronic project files. PA SHPO will return incorrectly named or formatted files. **Failing to follow these requirements may result in delays to your project.**

<p>Do you have a PA-SHARE account?</p> <p>If you do not, you will need to create a Basic user account. You must have a Basic, Pro, or Business account to submit a project. Basic accounts are free and use Pennsylvania's Keystone Login to sign up.</p>
<p>How are you initiating your project? What is the historic status of the property being rehabilitated?</p> <p>You will initiate your project in PA-SHARE by submitting a Part 1 application, Part 2 application, or both. This is based on the property's historic status, meaning how it is related to the National Register of Historic Places. If you do not know, search PA-SHARE to find out.</p> <p>Is the property a <u>single</u> building already individually listed in the National Register of Historic Places?</p> <ul style="list-style-type: none">• If yes, initiate your project with a Part 2 application.• If no, initiate your project with a Part 1 application. See the Part 1 guidance chart for more information.
<p>Do you have basic information about the historic property at hand?</p> <p>You will be required to update an existing resource or create a new resource in PA-SHARE as part of your project submittal. This includes properties that are single buildings already listed in the National Register.</p> <p>Having a current photograph and basic information about the building's appearance, construction, and function at hand will streamline the submittal process. If you are unfamiliar with PA SHPO's minimum record requirements, you may find PA SHPO's Worksheet for Recording Buildings helpful.</p>
<p>Are you using the most recent version of the Historic Preservation Certification Application forms from the National Park Service (NPS)?</p> <p>NPS issued updated forms in July 2023. Parts 1, 2, and 3 and amendment forms are available on the NPS website.</p>
<p>Have you completed the tax credit form that you will use to initiate your project?</p> <p>Information from the project form will be used in completing the online submission and applicants will be required to upload PDFs of your application before you can submit to PA SHPO.</p>
<p>Has the applicant signed the PDF form correctly?</p> <p>Adobe digital ID or an original signature that was scanned as a .jpeg (or other image) file is acceptable. Typed signatures in a different font are not acceptable.</p>



Federal Historic Tax Credits

Checklist for Submitting a Federal Historic Tax Credit Project using PA-SHARE

Have you saved the application parts as separate PDF files?	Each part of the application must be uploaded to PA-SHARE as a separate PDF file that is 70MB or smaller. Use this list to organize your files.
Have you saved the application parts using the NPS-required naming conventions?	Refer to NPS' instructions for naming individual application parts prior to saving and uploading the PDFs to PA-SHARE.
Have you formatted the photo sheets using the NPS's template or similar?	Photographs must follow NPS guidelines for formatting and captions. Photographs should be submitted in one PDF file and not uploaded as individual jpegs through PA-SHARE.
Have you filled out a transmittal log?	Use the NPS template to provide PA SHPO with a list of the files you've uploaded to PA-SHARE for review. This helps PA SHPO and NPS track applications.

NPS Guidance

NPS has developed file- and photo-naming conventions and instructions on organizing files for electronic submission. All electronically submitted applications must follow these conventions and instructions. Applicants should download these PDF files for reference in preparing materials for electronic submission.

- [Applicant and Project Contact Electronic Submission Workflow](#)
- [Electronic File Format Standards and File Naming Conventions](#)
- [Photo Naming Conventions, JPEG Requirements and Photo Sheet Examples](#)
- [Transmittal Log Examples](#)
- [Responding to NPS Holds and Uploading Files to the HPCA Submission Site](#)

Application Parts

Use this list to make sure you are submitting PDFs of the application parts correctly. The following should be separate files named according to NPS' required naming conventions and formatting:

Initiating a Project with a Part 1 Application	Initiating a Project with a Part 2 Application
<ul style="list-style-type: none"> • Part 1 application form • Part 1 narrative (description and significance) • Photo key • Photo sheets • Map of historic district (if applicable) • PA SHPO Determination of Eligibility review (if applicable) • Ownership statement (if applicable) 	<ul style="list-style-type: none"> • Part 2 application form • Part 2 narrative (detailed description of work) • Photo key • Photo sheets • Existing conditions elevations and site plan • Existing conditions floor plans, sections, and details • Proposed work elevations and site plan • Proposed work floor plans, sections, and details



Federal Historic Tax Credits

Checklist for Submitting a Federal Historic Tax Credit Project using PA-SHARE

Part 1/Property Historic Status Guidance

If you need to initiate your project with a Part 1 application, you will need to know the historic status of the property to be rehabilitated. Use the scenarios below to understand how to proceed.

My property is located within a National Register-listed or certified local historic district. You will initiate your project by submitting a Part 1 application and provide the name of the historic district. Please note that a certified local historic district is not the same as a local historic district created and legislated by municipalities under Pennsylvania's Historic District Act (Act 167) or the Municipalities Planning Code (MPC). It is a formal designation completed by the National Park Service specifically for the historic tax credit program. For a list of certified tax districts, please contact PA SHPO.

My property is already listed in the National Register but there are multiple buildings on the property. You will initiate your project by submitting a Part 1 application. Treat properties that include more than one historic resource within the tax parcel as you would a contributing building in a listed historic district.

I submitted a DOE request, but it is not listed in the National Register yet. You will initiate your project by submitting a Part 1 application. Include PA SHPO's Determination of Eligibility letter if the DOE review has been completed. Your Part 1 application should include a substantial draft National Register nomination describing the property's physical condition and historical and/or architectural significance.

My property is in PA-SHARE and is marked as "eligible," but I did not submit the DOE request as part of the federal historic tax credit project. Contact PA SHPO's National Register staff to discuss the property's status and guidance for National Register listing. Depending on when PA SHPO's determination was made, you may need to request a new DOE or provide current information. *We strongly recommend that you do this before submitting your tax credit project. PA SHPO's tax credit reviewer will not complete review of your Part 1 application until PA SHPO's National Register section has completed their DOE review.*

My property is in PA-SHARE but shown as "undetermined." For undetermined properties, you will need to request a DOE from PA SHPO. *We strongly recommend that you do this before submitting your tax credit project. PA SHPO's tax credit reviewer will not complete review of your Part 1 application until PA SHPO's National Register section has completed their DOE review.*

My property is in PA-SHARE but shown as "not eligible." You can request a new DOE review. We strongly recommend that you contact PA SHPO's National Register staff before proceeding with a new request.

Assistance

If you need assistance using PA-SHARE, please contact the PA-SHARE Help Desk at pashare@pa.gov. Help materials and FAQs for using PA-SHARE are available online at <https://www.phmc.pa.gov/PA-SHARE/Pages/Help-Materials.aspx>.

If you have questions about preparing the tax credit application materials, please contact PA SHPO tax credit staff at phmctaxcredit@pa.gov.

If you have questions about the National Register status of your property or submitting a Determination of Eligibility (DOE) request, please contact [PA SHPO National Register staff](#).