



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>



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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



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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](#).