Brian P. Kemp Governor



# Welcome to the DCA – HPD Tax Incentives Online Database!

It is our hope that going online will make the **State and Federal** Tax Incentives Application accessible to more people.

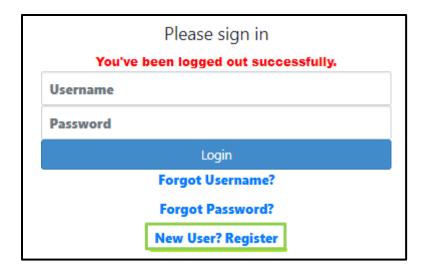
These instructions provide guidance for those applying to the State and Federal Tax Credit Program.

# LINK TO DATABASE

https://hpd.ga.gov/nrtigers/login

### Step 1: Create profile

To access the database, you will need a user profile. On the home screen, select New User? Register



The first box on the Registration page asks for Registration Type. Select TI Applicant.

Registration Type *	TI Applicant	Registration Guidelines
	ER Applicant	
	ER Researcher Regional Representative	_
	Regional Representative	· _

From there, please fill in your information in the Registrant Application. All items with an asterisk\* are required. At this time, we do not need documents in the registration page. While there is an asterisk\* in the Documents section, you can still submit the registration without uploading documents.

60 Executive Park South, NE | Atlanta, GA 30329-2231 | 404-679-4940 www.dca.ga.gov | An Equal Opportunity Employer



Your registration must be approved before you can create projects and submit applications in the database. We review registrations daily and should get back with you shortly regarding the status of your registration. You will receive an email confirming approval by our office of your registration.

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## Step 2: Create Project

An initial project profile must first be created before the application and supporting documentation can be added and submitted. This project profile will house all applications, which you will not be able to edit once submitted. You will, however, be able to see that an application has been submitted, the date submitted, and the date payment is received.

To create the project profile, navigate to the Tax Incentives tab on the Ribbon bar at the top of the screen. To create a project click *Create Project*.

Georgia®opper Communit	y Affairs	
Home Tax Ince	ntives View Pending Forms	
Create Project	Project Number:	
	Property Name:	
	Property Address:	
	City:	
	County(s):	Please Choose A Appling Akinson Bacon •
	Historic District Name:	
	Reset Search	

The *Create Project* submission will ask basic questions about the property and project contacts. Once submitted, the information in this section CANNOT be changed. Please ensure that it is correct before submitting. All items with an asterisk\* are required. It is possible to save the Project as a draft, but the system will only let you do so if all the asterisk\*required items are filled in. They can be changed later within the saved draft, prior to submission. Sections of the *Create Project* page are shown below with notes.

New Project	
Property Name	
Property Address	
Address Line 1 *	
Address Line 2	
City *	
ZIP *	
County *	Please Choose

Owner Information	
Project Owner Name *	
Company/Organization	
Address Line 1 *	
Address Line 2	
City *	
State *	Please Choose
ZIP *	
Primary Phone *	
Alternate Phone	
Email *	
Fax	

If you are a consultant for a project, please enter your information in the *Contact Information* section. While the information is not \*required by the system, it is necessary for our records that any consultant information is submitted, particularly your email and phone number to contact you.

Contact Information	
Project Contact Name *	
Company/Organization	
Address Line 1	
Address Line 2	
City	
State	Please Choose
ZIP	
Primary Phone	
Alternate Phone	
Email	
Fax	

*Property Information* and *Intended Applications* provide basic information about the project and will be displayed in the Dashboard for the property. The *Intended Applications* box signifies which tax incentives you intend to apply for.

Property Information	
Original Construction Year *	
Alteration Years	
Number of Phases *	
Number of Buildings	
Building Type *	Please Choose V
NRListing Status	Please Choose V
Historic District Name	
Type of Construction *	Please Choose v
Use Before Rehab *	Please Choose V
Use After Rehab *	Please Choose
Intended Applications	
Federal Credit	
State Credit	
State Credit Cap	Please Choose 🗸
State Freeze	

Like the Registration Page, this page also allows you to upload documents, though that is not required. Documents required for the Part A application should be submitted in the Part A application, see Step 3.

## Step 3: Create Part A Application

Search for your property using the Property Search function in the Tax Incentives tab. Select your property by clicking on the Project Number to the far left, which is in a clickable blue font. Once you have navigated to the property dashboard, select the *New Part* Button on the far right of the screen, shown below.

Home Tax Incentives	View Pending Forms			+)Change Password
Back				
Project Dashboard	- 2021-1326			
Property Address		Type of Construction	Masonry bearing wall	
Property Name		Building Type	House	
Received Date	09/29/2021	Federal Credit	YES	
IPS Project Number		State Credit	YES	
County		State Freeze	YES	
IR Listing Status		State Credit Cap	100K	
listoric District Name				
Project Parts				New Part
Part	Received Date		Payment Received Date	
<				1

The *New Part* Button will lead you to the screen below, where you will select "Part A" from the drop-down menu, then click *Submit*.

Part - 2021-1326		
Project Number	2021-1326	
Project Part *	Please Choose	~

Once you click *Submit*, the screen will change to the Part A Application page. This page is long and there are many questions to answer, so you may prefer to prepare your answers separately in a word processor, then copy and paste them into the application page. The system will time out after 30 minutes of inactivity and your work will not be saved. All questions are included in the photos below to help you prepare.

It is possible to save the application as a draft, but the system will only let you do so if all the \*required items are filled in. They can be changed later within the saved draft.

Please note, all large text boxes have a 2,000-character limit. If you need to submit more information, please submit it as an attachment to the Application.

Part - 2021-1967	
Project Number 2021	-1967
Project Part * Par	tA 🔹
Received Date *	dd/yyyy
Please select one of the following four options relate	d to the Georgia Register of Historic Places (GRHP):
<ul> <li>Preliminary Determination of Individual Listing for listing in GRHP as individual property (National Register packet, including draft 10-900 Form must be attached in Document Upload section below)</li> </ul>	
<ul> <li>Preliminary Determination of Historic District for listing in GRHP as part of a historic district (National Register packet including draft 10-900 Form must be attached in Document Upload section below)</li> </ul>	n
<ul> <li>Property listed individually in Georgia Register of Historic Places (GRHP)</li> </ul>	
<ul> <li>Property located within GRHP-listed historic district (name of district)</li> </ul>	
Estimated total cost of project (including any ne construction or site work ) *	w\$
Estimated amount of Qualified Rehabilitation Expenditures *	\$
Estimated Project Start Date *	mm/dd/yyyy
Estimated Project Completion Date *	mm/dd/yyyy
Does the project involve the preservation of Georgia specimen trees?(The term "specimen tr means any tree having a trunk diameter of 30 inches or more.) *	Please Choose v
If this property is a Historic Home, is it located within a target area?	Please Choose
List major alterations or additions that occurred prior to the submittal of this application (both historic and non-historic) including estimated construction dates	
Estimated floor area before rehab *	sqft
Estimated floor area after rehab *	sqft
Fair Market Value Before Rehab *	\$
Adjusted Basis Before Rehab *	\$
Is more than one building being rehabilitated within two acres of the property? *	Please Choose 🗸
Is this project associated with other projects or buildings through physical connections, parcel or lot lines, or common ownership? *	Please Choose 🗸
If yes, list the addresses of the associated properties	

Shown below: List of buildings, structures, and additions located on the property - if there is more than one building, structure, or addition to the property, please click the blue *Add* button in the right corner of the header to add a new line for each building/structure/addition.

List all th	buildings, structures, and additions located on the property				
Name/Typ	#of stories     Year of Construction				
Chec	list				
	Map showing the lot where the building is located (if within a GRHP listed district, provide portion of district map)* Color Photographs showing exterior and interior views of the property. All photos must be labeled and numbered to correspond with the accompanying photo key. (See Photo Documentation Guidelines)* Photo key illustrating the location and view of each photograph (see Photo Documentation Guidelines)* Sketched or architectural floor plans of existing conditions (see Photo Documentation Guidelines).* Sketched or architectural floor plans of proposed work (see Photo Documentation Guidelines).* Sketched or architectural floor plans of proposed work (see Photo Documentation Guidelines).*				
Eval	Evaluation of Significance				
Des	ription of Physical Appearance *				
Stat	ment of Significance *				

For the Architectural Features section, please select Yes, if the property has that feature and work is proposed for it; No, if the property has that feature but work is not proposed for it; or N/A, if the project does not have that feature.

Architectural Features		
Foundation - such as repairing brick or stone masonry, repointing mortar joints, patching stucco, infilling between piers, etc. *	Please Choose 🗸	
Structure - repairing and stabilization of all historic structural elements excluding interior finish materials *	Please Choose 🗸	]
Roof - new roofing material, flashing, roof deck, repairing the roof structure, dormers, or vents *	Please Choose 🗸	-
Chimneys - repairing brick or stone masonry, stabilization, repointing mortar joints, patching stucco or repairing exterior materials *	Please Choose 🗸	]
Exterior Siding *	Please Choose 🗸	•]
Porches- such as repairing porch roofs, flashing, deck, structure, columns, posts, railings, flooring, floor structure, foundation *	Please Choose 🗸	]
Windows - repairing existing windows, replacing sashes where missing or too deteriorated to repair, hood molds, sills, shutters, frames *	Please Choose 🗸	

Exterior Doors - repairing doors, frames, sidelights, transoms, hardware *	Please Choose	~
Replacement of Missing Features - removing later features and/or replacing with new work duplicating missing features *	Please Choose	~
Stairs - interior and exterior, repairing existing railings, balusters and newel posts, repairing or replacing of treads, structural stabilization *	Please Choose	~
Ceilings and Walls (including, but not limited to: repairing historic plaster, new plaster where it was a documented historic finish, using wood and metal lath, documented decorative or flat plaster features, brick, tile, etc.)*	Please Choose	~
Interior Trim- such as baseboards, crown molding, window frames, picture rails, chair rails, wainscoting, beaded board *	Please Choose	~
Flooring - repairing, patching or replacing historic wood tile, masonry or other flooring material *	Please Choose	~
Fireplaces - repairing masonry, repointing mortar joints, repairing grout and tile and wood surrounds, mantels, hearths, removal of later coal burning inset *	Please Choose	~
Floor Plan Alterations - within historic buildings such as adding walls to partition spaces, removing walls to create larger spaces, adding or removing door openings *	Please Choose	~
Energy Efficiency Measures - such as insulating an attic or crawlspace, interior or exterior storm windows, storm doors, weather-stripping *	Please Choose	~
HVAC Systems - repairing existing or installing a new HVAC system, installing flue liners on historic chimneys *	Please Choose	~
Electrical and Plumbing systems - repairing existing or installing new electrical systems, repairing existing or installing new plumbing systems, repairs to existing historic electrical and plumbing fixtures *	Please Choose	~
Lighting - repairing any historic lighting fixtures *	Please Choose	~
Kitchen - fixtures, finishes, flooring *	Please Choose	~
Bathrooms/ Toilet Rooms - fixtures, finishes, flooring *	Please Choose	~
Additions - work done on non-historic additions, construction of a new addition *	Please Choose	~
Landscaping - such as plantings, grading, restoring historical landscape features *	Please Choose	~
Outbuildings - work on any historic outbuildings *	Please Choose	~
Other Descriptions		

For proposed work descriptions, please add a new line for each feature listed in the previous section for which work is proposed. Lines can be added by clicking the blue *Add* button to the right in the header. If you are submitting a Part 2 application simultaneously, you may omit filling out the work descriptions and instead attach a copy of your federal work descriptions from the Part 2.

Instructions to fill out the work descriptions						
Detailed Project Description: Use the following spaces to describe the proposed rehabilitation work. In the top portion of each space, note an Architectural/Building feature and describe its current physical/visual condition. In the bottom portion of the space, describe the planned work and impact (resulting in its final condition) to the feature; if there is no change or impact to a feature; write "No Changes". Photos illustrating associated existing conditions should be listed in the space provided (see application instructions and Photo- Documentation Guidelines for additional information about appropriate placet documentation of your project.) NOTE: BE AS SPECIFIC AND DETAILED AS POSSIBLE IN ALL WORK DESCRIPTIONS.						
Work Descriptions				Add		
Architectural/ Building Features:	See Photos	Describe Existing Feature and Its Condition	Describe Work and Impact on Existing Feature			
				Delete		
		Save Submit Cancel				

Finally, all documents to be uploaded from the checklist can be uploaded in the Document Upload section. If you are submitting a Part 2 application simultaneously with your Part A, you may skip uploading any duplicate documents to the Part A. Under Part A, you need only upload documents that are unique to the Part A. There is no need to duplicate documents that will be submitted under Part 2. If there are no files unique to Part A, nothing needs to be uploaded here. Please ensure that each document is uploaded as a separate PDF. Please name your files according to the naming protocol.

#### File naming protocol:

Beginning August 15, 2023, HPD will require all file submissions to follow the NPS naming conventions outlined here: hpca-file-format-naming-2023-07-14-508.pdf (nps.gov).

The general naming convention is NPSNumber\_ApplicationPart\_HistoricPropertyName [or Property Address if no HistoricPropertyName]\_ City\_State. If you are applying only for state tax credits, you will not need an NPS Number, and this can be omitted from the file name. There should be no spaces, punctuation, or special characters in the folder and file names, and underscores are used in place of spaces (NPS electronic file requirements limits the use of special characters for transfer, sorting, and other reasons). File names should be limited to 75 characters.

ERandleXYZBottlingPlant\_Savannah\_GA

PartA\_AdditionalNarrative\_123MainStreet\_Savannah\_GA

Part B\_Photos\_123MainStreet\_PeachtreeCity\_GA Part B\_PhotoKey\_ABCLofts\_PeachtreeCity\_GA

The system cannot support files with names that include periods (.) If you receive an error message while attempting to upload a file, double check that there are no periods (.)

<u>FOR PHOTOS</u>: Please upload all photos in a single PDF file. Photos should be 4"x6". Photographs must be clear and must have sufficient resolution to show the details required for review of rehabilitation work. Photographs must be in color and taken at a high resolution. Please ensure you are using clear, high resolution, full sized photos within the PDF. Avoid including thumbnails or compressed photos. If a single file is too large to upload (exceeding 50 MB), photos may be split into multiple files to accommodate. To create the PDF file, please add all photos to a Word or Pages document, with no more than two photos per page, and all relevant photo information including the photo number below each photo. The property name, address, date of photos, and application part (i.e., Part A, Part B, Amendment) must be listed at the top of each page. The photo number (labeled according to a Photo Key) and caption must be listed under each photo. The caption must include the view shown (e.g., north side) and a description of the view (e.g., plaster damage in dining room, north wall). The Photo Key must be a separate PDF file. Please see the Photo Documentation Guide for instructions on how to properly document your historic property.

Individual Photo Files: HPD and NPS will accept individual photo files limited to no more than 20 JPEG or TIFF files per submission. Only JPEG or TIFF formats will be accepted. Individual photo files must be saved within their own folder and named according to the **NPS Naming Conventions**, found here: <u>hpca-file-format-naming-2023-07-14-508.pdf (nps.gov)</u>.

Click the *Choose Files* button to add a document to upload and select the proper corresponding Document Type. Please submit all documents as PDF files. See FAQ for list of Document Type categories.

Document Upload		
Document: *	Choose Files XYZ, City, County_Part A Floorplans_FirstFloor.jfif	
Document Type: *	Existing Floor Plan - TI	~
Upload		

Once you successfully upload your document, the green band will appear above the list saying, "Document Uploaded Successfully" and the document will appear in the list. **REMINDER: you cannot update the application once it has been submitted.** Please ensure all documents are uploaded correctly and information is correct before submitting the application.

Document Uploaded Successfully						
Repository Doc ID	Document Name	Document Type	Description	Size	Filed Date	
2763	XYZ, City, County_Part A_Existing Floorplans_FirstFloor.jfif	Existing Floor Plan	Document Panel	1760952	09/28/2021	View Download

After you have uploaded all documents, click the blue *Submit* button. Once your application is submitted, the owner and consultant listed will receive an email confirmation. The owner will later receive an invoice via email for a Part A application review fee from our office soon after. You will be able to see the Part A as submitted in the project dashboard but will not have access to the application itself. Once the review fee is paid, the project will enter our review queue and you will be able to see the payment date in the dashboard as well.

When you are ready to submit your Federal Part 1 and Part 2, please see Steps 4 and 5 below. To submit an Amendment for changes to work descriptions, please see Step 6 below. If there are any changes to the project owner, timeline, QREs, or other information, excluding work descriptions, please contact our office to discuss the process for submitting these changes.

When your project is completed, you will need to submit a Part B application. Please see Step 7 for instructions. For completion of projects submitted for Federal review, you will also need to submit a Part 3 application. Please see Step 8 for instructions.

## Step 4: Create Part 1 Application

Search for your property using the Property Search function in the Tax Incentives tab. Select your property by clicking on the Project Number to the far left, which is in a clickable blue font. Once you have navigated to the property dashboard, select the *New Part* Button on the far right of the screen, shown below.

Home Tax Incentives	View Pending Forms			+Change Password
Back				
Project Dashboard	- 2021-1326			
roperty Address roperty Name teceived Date IPS Project Number county IR Listing Status listoric District Name	0929/2021	Type of Construction Building Type Federal Credit State Credit State Freeze State Credit Cap	Masony bearing wall House YES YES 100K	
Project Parts				New Part
Part	Received Date		Payment Received Date	

The New Part Button will lead you to the screen below, where you will select "Part 1" from the drop-down menu, then click Submit.

Part - 2023-4129		
Project Number	2023-4129	
Project Part *	Please Choose Please Choose Amendment Part 1 Part 2 Part 3 Part A Part 8 Part 8	Submit Cancel

Once you click *Submit*, the screen will change to the Part 1 Application page, seen below.

	9				
Project Number	2023-4129				
Project Part *	Part 1	×			
			Save	nit Cancel	
Document Uploa	ad				
	Choose Files	No file chosen			
Document: "	Ginoose Field				
Document: " Document Type: " Upload	Please Choo		v)		

Under document upload, please include the 2023 NPS Part 1 application form and any necessary supporting documentation. More information about required documents can be found at <u>Documentation Requirements for</u> <u>Certification Applications - Historic Preservation Tax Incentives (U.S. National Park Service) (nps.gov)</u>.

Click the *Choose Files* button to add a document to upload, and select the proper corresponding Document Type. Please submit all documents as PDF files. See FAQ for list of Document Type categories.

Document Uploaded Successfully						
Repository Doc ID	Document Name	Document Type	Description	Size	Filed Date	
2763	XYZ, City, County_Part A_Existing Floorplans_FirstFloor.jfif	Existing Floor Plan	Document Panel	1760952	09/28/2021	View Download

Once you successfully upload your document, the green band will appear above the list saying, "Document Uploaded Successfully" and the document will appear in the list. **REMINDER: you cannot update the application once it has been submitted.** Please ensure all documents are uploaded correctly and information is correct before submitting the application.

After you have uploaded all documents, click the blue *Submit* button. Once your application is submitted, the owner and consultant listed will receive an email confirmation. You will be able to see the Part 1 as submitted in the project dashboard but will not have access to the application itself.

To submit an Amendment for changes to work descriptions, please see Step 6. If there are any changes to the project owner, timeline, QREs, or other information, excluding work descriptions, please contact our office to discuss the process for submitting these changes.

When you are ready to submit your federal Part 2 application, please see Step 5.

## Step 5: Create Part 2 Application

Search for your property using the Property Search function in the Tax Incentives tab. Select your property by clicking on the Project Number to the far left, which is in a clickable blue font. Once you have navigated to the property dashboard, select the *New Part* Button on the far right of the screen, shown below.

Home Tax Incentives	View Pending Forms			+OChange Password
Back				
Project Dashboard -	2021-1326			
Yroperty Address Property Name Received Date IPS Project Number Jounty R Listing Status IR Listing Status	09292021	Type of Construction Building Type Federal Credit State Credit State Credit State Credit State Credit Cap	Masony bearing wali House YES YES YES 100K	
Project Parts				New Part
Part	Receive	Date	Payment Received Date	

The *New Part* Button will lead you to the screen below, where you will select "Part 2" from the drop-down menu, then click *Submit*.



Once you click Submit, the screen will change to the Part 2 Application page, seen below.

<sup>p</sup> roject Number	2023-4129
Project Part *	Part 2 V
Estimated Project Start Date *	mm/dd/yyyy
Estimated Project Finish Date	mm/dd/yyyy
Estimated Total Project Cost *	
Square Footage Before Rehab	
Square Footage After Rehab	
	Save Submit Cano
ocument Upload	
Document Upload	Choose Files No file chosen

All items with an asterisk\* are required.

Under document upload, please include the 2023 NPS Part 2 application form. Please ensure that all application PDFs are flattened, including signature pages. To accomplish this, open your completed PDF, go to "File," then "Print," and then choose Adobe PDF as the printer. Please note that if you are submitting a Part 1 and Part 2 simultaneously you may upload your before-rehab photos under the Part 1. More information about required documents can be found at <u>Documentation Requirements for Certification Applications - Historic Preservation Tax Incentives (U.S. National Park Service) (nps.gov)</u>.

Click the Choose Files button to add a document to upload and select the proper corresponding Document Type.

Document Uploaded Successfully							
Repository Doc ID	Document Name	Document Type	Description	Size	Filed Date		
2763	XYZ, City, County_Part A_Existing Floorplans_FirstFloor.jfif	Existing Floor Plan	Document Panel	1760952	09/28/2021	View	Download

Once you successfully upload your document, the green band will appear above the list saying, "Document Uploaded Successfully" and the document will appear in the list. **REMINDER: you cannot update the application once it has been submitted.** Please ensure all documents are uploaded correctly and information is correct before submitting the application.

After you have uploaded all documents, click the blue *Submit* button. Once your application is submitted, the owner and consultant listed will receive an email confirmation. You will be able to see the Part 2 as submitted in the project dashboard but will not have access to the application itself.

To submit an Amendment for changes to work descriptions, please see Step 6. If there are any changes to the project owner, timeline, QREs, or other information, excluding work descriptions, please contact our office to discuss the process for submitting these changes.

When you are ready to submit your federal Part 3 application, please see Step 8.

## Step 6: Submitting an Amendment (if needed)

If you need to submit an Amendment to your application, the process is very similar to submitting a Part A Application. If you need to amend more than one Project Part (for example, an amendment is needed for both Part A & Part 2), you will need to submit an amendment for each.

Search for your property using the Property Search function in the Tax Incentives tab. Select your property by clicking on the Project Number to the far left, which is in a clickable blue font. Once you have navigated to the property dashboard, select the *New Part* Button on the far right of the screen, as you did with the Part A application, shown below.

Project Dashboard	- 2021-1326					
Property Address			Type of Construc	ction Masonry bearing wall		
Property Name			Building Type	House		
Received Date			Federal Credit	YES		
NPS Project Number			State Credit	YES		
County			State Freeze	YES		
NR Listing Status			State Credit Cap	100K		
Historic District Name					_	
Project Parts					New	/ Part
Part		Received Date		Payment Received Date		
Part A		09/29/2021		09/30/2021		

The New Part button will take you to the same Project Part selection page. Select "Amendment" from the list.

Part - 2021-1326			
Project Number	2021-1326		
Project Part *	Please Choose	~	

There is only one question for the Project Amendment page. Please use this box (2000-character limit) to briefly describe the proposed changed, and then upload supporting documentation in the Document upload section, utilizing the NPS file naming protocol. <u>REMINDER: you cannot update the application once it has been submitted</u>, so please ensure all documents are uploaded correctly and information is correct before submitting the application.

Part - 2021-1326	
Project Number	2021-1326
Project Part *	Amendment V
Describe the project change: *	
	Save Submit Cancel

Please follow the file naming protocol for any documents submitted for an Amendment, and be sure that all PDFs are flattened. Click the *Choose Files* button to add a document to upload and select the proper corresponding Document Type. Please submit all documents as PDF files. See FAQ for list of Document Type categories.

Document Uplo	ad					
Document: *		Choose Files XYZ, Cit	y, County_Part A Floorp	lans_FirstFloor.jfif		
Document Type: *		Existing Floor Plan - T	1		~	
Upload						
Document Uploaded Successfully						
Repository Doc ID	Document Name	Document Type	Description	Size	Filed Date	
2763	XYZ, City, County_Part A_Existing Floorplans_FirstFloor.jfif	Existing Floor Plan	Document Panel	1760952	09/28/2021	View Download

After you have uploaded all of your documents, click the blue *Submit* button. Once your application is submitted, the owner and consultant listed will receive an email confirmation. There is no review fee for Amendments, so your amendment will enter the review queue based on the date of submission. You will be able to see the Amendment as submitted in the project dashboard. If you need to submit another amendment, please do so following these same instructions to create another "new part."

## Step 7: Submitting a Part B Application

Congratulations! You have finished your project and are ready to submit your Part B Application for your project. The process is similar to the other applications.

Search for your property using the Property Search function in the Tax Incentives tab. Select your property by clicking on the Project Number to the far left, which is in a clickable blue font. Once you have navigated to the property dashboard, select the *New Part* Button on the far right of the screen, shown below.

Back					
Project Dashboard -	2021-1326				
Property Address			Type of Construction	Masonry bearing wall	
Property Name			Building Type	House	
Received Date	09/29/2021		Federal Credit	YES	
NPS Project Number			State Credit	YES	
County			State Freeze	YES	
NR Listing Status			State Credit Cap	100K	
listoric District Name					
Project Parts					New Part
Part		Received Date		Payment Received Date	E
Part A		09/29/2021		10/29/2021	e E
Amendment		09/29/2021			E

The *New Part* Button will lead you to this screen, where you should select Part B from the drop-down menu, then click *Submit*.

Part - 2021-1326		
Project Number	2021-1326	
Project Part *	Please Choose	~

Once you click *Submit*, the screen will change to the Part B Application page. The system will time you out after 30 minutes of inactivity and your work will not be saved. All questions are included in the photos below to help you prepare. It is possible to save the application as a draft, but the system will only let you do so if all the \*required items are filled in. They can be changed later with the saved draft.

Project Number	202	-1326	
Project Part *	Par	t B 🗸	
Please select which program/	s you are applying for:		
State Preferential Propert	y Tax Assessment Pro	gram	
State Income Tax Credit F	Program for Rehabilitat	ed Historic Property	
Adjusted basis of building (refer Revenue Substantial Rehabilitat			(Substantial Rehabilitation Worksheet)
Fair market value of the building	*		
After rehab floor area *			
Project start date *		mm/dd/yyyy	
Project completion date *		mm/dd/yyyy	
Total project cost (rehab work and construction site work) *	-		\$
Cost solely attributed to new co work *	nstruction and site		5
Cost solely attributed to historic mapped to Actual QRE) *	rehab: (Should be		\$
Cost of interior rehab work			\$
Cost of exterior rehab work *			\$
The following questions pertain	only to historic homes		
Is the home located within a targ	jet area?	Please Choose	~
Date the home was first owned I	by the applicant	mm/dd/yyyy	
Date the home was first used as	principal residence	mm/dd/yyyy	
If home is not yet used as a prin give the date that it will be	cipal residence,	mm/dd/yyyy	

The application will not be reviewed unless it is complete with the following attachments:

Color photographs showing exterior and interior completed work. All photos must be labeled and numbered to correspond with the accompanying photo key. (See Photo Documentation Guidelines)\*

After rehabilitation, a photo key illustrating the location and view of each photograph. \*

After rehabilitation floor plan. \*



Finally, all documents to be uploaded from the checklist can be uploaded in the Document Upload section. Under Part B, please upload only documents that are unique to Part B. There is no need to duplicate documents that will be submitted under Part 3. If there are no files unique to Part B, nothing needs to be uploaded here. Please name your files according to the naming protocol, shown below.

#### File naming protocol:

Beginning August 15, 2023, HPD will require all file submissions to follow the NPS naming conventions outlined here: hpca-file-format-naming-2023-07-14-508.pdf (nps.gov).

The general naming convention is NPSNumber\_ApplicationPart\_HistoricPropertyName [or Property Address if no HistoricPropertyName]\_ City\_State. If you are applying only for state tax credits, you will not need an NPS Number, and this can be omitted from the file name. There should be no spaces, punctuation, or special characters in the folder and file names, and underscores are used in place of spaces (NPS electronic file requirements limits the use of special characters for transfer, sorting, and other reasons). File names should be limited to 75 characters.

Examples:

PartA\_XYZBottlingPlant\_Savannah\_GA PartA\_AdditionalNarrative\_123MainStreet\_Savannah\_GA Part B\_Photos\_123MainStreet\_PeachtreeCity\_GA Part B\_PhotoKey\_ABCLofts\_PeachtreeCity\_GA

The system cannot support files with names that include periods (.) If you receive an error message while attempting to upload a file, double check that there are no periods (.)

<u>FOR PHOTOS</u>: Please upload all photos in a single PDF file. Photos should be 4"x6". Photographs must be clear and must have sufficient resolution to show the details required for review of rehabilitation work. Photographs must be in color and taken at a high resolution. Please ensure you are using clear, high resolution, full sized photos within the PDF. Avoid including thumbnails or compressed photos. If a single file is too large to upload (exceeding 50 MB), photos may be split into multiple files to accommodate. To create the PDF file, please add all photos to a Word or Pages document, with no more than two photos per page, and all relevant photo information including the photo number below each photo. The property name, address, date of photos, and application part (i.e., Part A, Part B, Amendment) must be listed at the top of each page. The photo number (labeled according to a Photo Key) and caption must be listed under each photo. The caption must include the view shown (e.g., north side) and a description of the view (e.g., plaster damage in dining room, north wall). The Photo Key must be a separate PDF file.

. Utilize the "Save As" function and select .pdf as the file type. Please see the Photo Documentation Guide for instructions on how to properly document your historic property.

Individual Photo Files: HPD and NPS will accept individual photo files limited to no more than 20 JPEG or TIFF files per submission. Only JPEG or TIFF formats will be accepted. Individual photo files must be saved within their own folder and named according to the **NPS Naming Conventions**, found here: <u>hpca-file-format-naming-2023-07-14-508.pdf (nps.gov)</u>.

Click the *Choose Files* button to add a document to upload and select the proper corresponding Document Type. Please submit all documents as PDF files. See FAQ for list of Document Type categories.

Document Upload	
Document: *	Choose Files XYZ, City, County_Part A Floorplans_FirstFloor;fif
Document Type: *	Existing Floor Plan - TI
Upload	

Once you successfully upload your document, the green band will appear above the list saying, "Document Uploaded Successfully" and the document will appear in the list. <u>REMINDER: you cannot update the application once it has been submitted, so please ensure all documents are uploaded correctly and information is correct before submitting the application.</u>

Document Uploaded Successfully						
Repository Doc ID	Document Name	Document Type	Description	Size	Filed Date	
2763	XYZ, City, County_Part A_Existing Floorplans_FirstFloor.jfif	Existing Floor Plan	Document Panel	1760952	09/28/2021	View Download

After you have uploaded all your documents, click the blue *Submit* button. Once your application is submitted, the owner and consultant listed will receive an email confirmation. The owner will later receive an invoice for a Part B application review fee from our office. You will be able to see the Part B as submitted in the project dashboard. Once the review fee is paid, the project will enter our review queue and you will be able to see the payment date in the dashboard as well.

## Step 8: Submitting a Part 3 Application

Congratulations! You have finished your project and are ready to submit your Part 3 Application for your project. The process is similar to the other applications.

Search for your property using the Property Search function in the Tax Incentives tab. Select your property by clicking on the Project Number to the far left, which is in a clickable blue font. Once you have navigated to the property dashboard, select the *New Part* Button on the far right of the screen, shown below.

Васк					
Project Dashboard -	2021-1326				
Property Address Property Name Received Date MPS Project Number County RR Listing Status Historic District Name	09292021		Type of Construction Building Type Federal Credit State Credit State Freeze State Credit Cap	Masony bearing wall House YES YES YES 100K	
Project Parts					New Part
Part		Received Date		Payment Received Date	
Part A		09/29/2021		10/29/2021	
Amendment		09/29/2021			

The *New Part* Button will lead you to this screen, where you should select Part 3 from the drop-down menu, then click *Submit*.

Part - 2021-1326			
Project Number	2021-1326		
Project Part *	Please Choose	*	

Once you click *Submit*, the screen will change to the Part 3 Application page, seen below. The system will time you out after 30 minutes of inactivity and your work will not be saved.

Project Number	2023-4129	
Project Part *	Part 3 💗	
Actual Start Date *	mm/dd/yyyy	
Actual End Date "	mmiddiyyyy	
Actual Cost of Project *		
Cost of New Construction		
Square Footage After Rehab		

Finally, all documents to be uploaded from the checklist can be uploaded in the Document Upload section. Please name your files according to the NPS naming protocol. Please ensure that all application PDFs are flattened, including signature pages. To accomplish this, open your completed PDF, go to "File," then "Print," and then choose Adobe PDF as the printer.

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The general naming convention is NPSNumber\_ApplicationPart\_HistoricPropertyName [or Property Address if no HistoricPropertyName]\_ City\_State. If you are applying only for state tax credits, you will not need an NPS Number, and this can be omitted from the file name. There should be no spaces, punctuation, or special characters in the folder and file names, and underscores are used in place of spaces (NPS electronic file requirements limits the use of special characters for transfer, sorting, and other reasons). File names should be limited to 75 characters.

Example file names: PartA\_XYZBottlingPlant\_Savannah\_GA PartA\_AdditionalNarrative\_123MainStreet\_Savannah\_GA Part B\_Photos\_123MainStreet\_PeachtreeCity\_GA Part B\_PhotoKey\_ABCLofts\_PeachtreeCity\_GA

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Click the *Choose Files* button to add a document to upload and select the proper corresponding Document Type. Please submit all documents as PDF files. See FAQ for list of Document Type categories.

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Document Type: *	Existing Floor Plan - TI 🗸
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Document Name	Document Type	Description	Size	Filed Date	
XYZ, City, County_Part A_Existing Floorplans_FirstFloor;jfif	Existing Floor Plan	Document Panel	1760952	09/28/2021	View Download
	XYZ, City, County_Part A_Existing	XYZ, City, County_Part A_Existing Existing Floor Plan	XYZ, City, County_Part A_Existing Existing Floor Plan Document Panel	XYZ, City, County_Part A_Existing Existing Floor Plan Document Panel 1760952	XYZ, City, County_Part A_Existing Existing Floor Plan Document Panel 1760952 09/28/2021

After you have uploaded all your documents, click the blue *Submit* button. Once your application is submitted, the owner and consultant listed will receive an email confirmation.

## **Additional Information**

Once your application has been reviewed, you will receive a letter by email indicating the HPD's decision on your application. These will serve as your submissions to the Department of Revenue.

## **Frequently Asked Questions**

#### Are there word limits for Statement of Significance and Property Description Text Boxes?

The character limit is 2000. You can also attach these two items as documents, should you prefer.

#### Can I save my Part A/B application before I submit it?

Yes, but all \*required fields must be completed first. They can be changed at any time prior to submitting the application

#### Where can I find my saved Part A/B/Amendment Applications?

Look under View Pending Forms. Saved Projects will be under "New Projects" and saved Application Parts will be under "New Parts/Amendments." Be sure to note your project's number as that will be the way to identify which application is yours.

#### Can I submit my federal application on this website?

Starting August 15, 2023, all state and federal Tax Incentive applications submitted to HPD must be submitted digitally. For information on how to complete a federal application, please visit Electronic Submission of Certification Applications - Historic Preservation Tax Incentives (U.S. National Park Service) (nps.gov) Instructions can be found here <a href="https://www.dca.ga.gov/georgia-historic-preservation-division/tax-incentives-grants/federal-tax-incentives">https://www.dca.ga.gov/georgia-historic-preservation-division/tax-incentives-grants/federal-tax-incentives</a>. Please ensure that all application PDFs are flattened when submitted to HPD, including signature pages. To accomplish this, open your completed PDF, go to "File," then "Print," and then choose Adobe PDF as the printer.

Your federal application will receive a preliminary review from the state office before being mailed to the National Park Service. The National Park Service will then send you an invoice for a federal review fee. Your federal application will then receive a final review from the Park Service in a minimum of 30 days after the National Park Service receives your federal review fee.

#### Is there an application fee?

Yes. Part A and Part B applications are charged a review fee based on a percentage of the Qualified Rehabilitation Expenses. You will be invoiced by this office via email after your application is submitted. There is no review fee for any amendments. For federal application, the National Park Service handles invoicing separately through their system.

#### When will my project be reviewed?

After submitting your Part A or Part B application, you will receive an email invoice for your project review fee. Projects will enter the review queue based on the date that the review fee is paid, not the date of the application. Amendments are not charged a review fee, and are automatically entered into the project review queue upon receipt.

#### Will I receive a sheet to turn into the Department of Revenue?

Yes, once the project has been reviewed, a signed letter will be sent to you by email which you will turn into the DOR.

#### Is there a minimum or maximum size for photographs?

Yes. Photos must be of a sufficiently high resolution, at least 300 dpi (dots per image). Photos should be 4"x6".

#### How should I title my files for upload?

Beginning August 15, 2023, HPD will require all file submissions to follow the NPS naming conventions outlined here: <u>hpca-file-format-naming-2023-07-14-508.pdf (nps.gov</u>). Remember, the system cannot support files with names that include periods (.). If you receive an error message while attempting to upload a file, double check that there are no periods (.).

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#### How should I save and upload my photos?

Please upload all photos in a single PDF file. If a single file is too large to upload (exceeds 50 MB), photos may be split into multiple files to accommodate. To create the PDF file, please add all photos to a Word or Pages document, with no more than two photos per page, and all relevant photo information including the photo number below each photo. The property name, address, date of photos, and application part (i.e., Part A, Part B, Amendment) must be listed at the top of each page. The photo number (labeled according to a Photo Key) and caption must be listed under each photo. The caption must include the view shown (e.g., north side) and a description of the view (e.g., plaster damage in dining room, north wall). Utilize the "Save As" function and select .pdf as the file type.

#### What file types can I upload?

Please submit all documents as PDF files (.pdf). For photos, please utilize .jpg or .jpeg formats within the PDF files. To create the PDF file from a Word or Pages document, utilize the "Save As" function and select .pdf as the file type. Most architectural drafting programs for floorplans permit files to be exported as a PDF. Remember the system's maximum file size is 50 MB. Photographs must be clear and must have sufficient resolution to show the details required for review of rehabilitation work. Photographs must be in color and taken at a high resolution. Please ensure you are using clear, high resolution, full sized photos within the PDF. Avoid including thumbnails or compressed photos.

#### What are the Document Type categories?

When uploading a file to your application, you must select one of the following Document Type Categories:

- Existing Floorplan
- Map
- Miscellaneous
- Photo Key
- Photographs
- Proposed Floorplan

#### Additional Questions?

If you have further questions about the digital application process, please contact Ashley Barrett, Architectural Reviewer, at <u>Ashley.barrett@dca.ga.gov</u>

## Terminology

**Specimen Tree**: As used in this Code section, the term "specimen tree" means any tree having a trunk diameter of 30 inches or more. § 48-5-7.2 Such rehabilitation expenditures shall also include expenditures incurred in preserving specimen trees upon not more than two acres of real property surrounding the building or structure. Work on specimen trees only qualifies towards the total expenses for the preferential property tax assessment but are not considered to be qualified rehabilitation expenses for the state property tax freeze.

**Phased Project**: The rules governing the State Income Tax Credit program allow rehabilitation projects to be "phased," which means work may extend over a period of up to 60 months instead of the usual 24 months. If a project is going to be phased, it MUST be designated as such on the Part A form. Projects may NOT become phased later on in the application process unless work has not yet begun. Once construction has started, a project cannot be phased.

#### Photo-Documentation for Rehabilitation of Historic Properties

Photo-documentation of a historic property is one of the most important aspects of applying to the Historic Preservation Tax Incentive Programs. It consists of a series of photographs, their numbering/labeling, and a photo-key drawing. These photographs are one of two primary resources used to evaluate a project to determine if it qualifies for the tax incentives, the other being the rehabilitation work descriptions. Pre-rehabilitation photographs are used to put the project within the context of the entire historic property and for comparison with the finished work. To achieve this, sufficient photo-documentation is necessary. The entirety of the historic property must be photo-documented, which also includes areas or spaces of the property that are not part of the proposed rehab work so that unchanged areas are confirmed as such upon project completion.

Any application with insufficient, inadequate, or otherwise unacceptable photo- documentation will be put on hold, concurrent with a Request For Information (RFI) to the applicant, until the necessary photography is furnished. Should the information not be forthcoming in a reasonable period of time, the application will be returned without review.

#### Photo Documentation Requirements:

- 1. Digital photos must have an image resolution of at least 300 dpi (dots-per-inch). Photos should be 4"x6" in size.
- 2. Please follow the naming conditions previously outlined in the application submittal instructions.
- 3. **ANY** photographs submitted with an application **MUST** provide obvious and comprehendible information. They must clearly show the areas or features being documented. Photographs that are out-of-focus, blurry, fuzzy, too dark, over-exposed (too light), photocopied, or low-resolution digital are unacceptable as adequate documentation. Photographs should be examined prior to submission to determine that they adequately provide the view that is intended.
- 4. Photographs must be taken in sufficient quantity and clarity to adequately document the prerehabilitation existing conditions and subsequently, the finished project. Enough photographs of all spaces, building elevations, and specific features must be provided as the visual description of the project's scope-of-work. At a minimum, typically, this would include photos of all exposed building elevations, 2 photos of each room, which should be oriented corner-to-corner from opposite corners, and additional photos of features and finishes being impacted by the rehabilitation work. Features and finishes may include, but are not limited to: masonry, plaster, windows, doors, trim and other millwork, stairs, ceilings, and fireplaces. If areas are too large or at a difficult angle, multiple photos need to be taken to ensure full and clear coverage of the entire area.
- 5. Photo-documentation of large projects with multiple, near identical spaces may not need photos of every room. In such cases, interior photographs of significant areas along with representative photos of the typical spaces may be acceptable.
- 6. Photographs must be labeled and keyed to a floor plan of the rehabilitation project. The position of the photographer, the direction toward which the picture was taken, and the photo number must be labeled on the drawing (a number within a circle with a directional arrow). The photographs themselves must be labeled with corresponding identification/information on their back.

To submit photos using the online database, photos must be uploaded in a single PDF file. If a single file is too large to upload (exceeds 50 MB), photos may be split into multiple files to accommodate. To create the PDF file, please add all photos to a Word or Pages document, with no more than two photos per page, and all relevant photo information including the photo number below each photo. Utilize the "Save As" function and select .pdf as the file type.

#### Photos for Federal Applications

# Please note that as of August 15<sup>th</sup>, 2023, all state and federal Tax Incentive applications submitted to HPD must be submitted digitally, including photographs.

Photos should be contained in a separate PDF file with no more than two photos per page, and with a minimum photo size of 4" x 6" per photo. The property name, address, date of photos, and application part (i.e., Part 1, Part 2, Part 3, Amendment) must be listed at the top of each page. The photo number (labeled according to a Photo Key) and caption must be listed under each photo. The caption must include the view shown (e.g., north side) and a description of the view (e.g., plaster damage in dining room, north wall). The Photo Key must be a separate PDF file.

Individual Photo Files: NPS will accept individual photo files limited to no more than 20 JPEG or TIFF files per submission. Only JPEG or TIFF formats will be accepted. Individual photo files must be saved within their own folder and named according to the **NPS Naming Conventions**.

Guidance on photo requirements and naming conventions can be found here: hpca-photo-requirements-2023-07-14-508.pdf (nps.gov).

Any application with insufficient, inadequate, or otherwise unacceptable photo- documentation will be put on hold, concurrent with a Request For Information (RFI) to the applicant, until the necessary photography is furnished. Should the information not be forthcoming in a reasonable period of time, the application will be returned without review.

#### Tips for Photographing Projects and Creating a Photo Key

- 1. Exterior photographs must document all facades of the building. Interior photographs must record architectural features and finishes, such as: windows, doors, fireplace mantels and surrounds, floors, walls, ceilings, stairs, mouldings, etc., as well as provide an overview of rooms throughout the building. Pay special attention to areas, which will be impacted by the proposed rehabilitation work.
- 2. Photo-key floor plans should be on 8 X 11 or 11 X 17 copies of the construction plans. If such is not available, floor plans can be hand drawn on blank or graph paper, but need to note all windows, doors, wall openings, fireplaces, stairs, etc.
- 3. All interior and exterior photographs should be numbered and identified with property address as well as the date the photo was taken.
- 4. A circle with the number of each photograph should denote on the floor plan the location of the photographer. The arrow identifies the direction of the photograph.
- 5. Keep a copy of the before-rehabilitation photo-key for reference when photo- documenting the completed project. For comparison, views of the completed work should be of and from the same locations.

Example of a Keyed Floor Plan

