HISTORIC PRESERVATION DIVISION

User Guide Historic Preservation Division's Environmental Review Online Project Submittal Portal

It is our hope that this online project submittal system will make the environmental review process more efficient for all users.

Electronic submission of projects via email to <u>ER@dca.ga.gov</u> remains an option when technical issues arise with the online portal.

Mailing project materials is no longer an available option, except for archival copies of mitigation materials.

Details related to submitting a project to ER/HPD for review, including the *Environmental Review Form* and answers to frequently asked questions, can be found on our website at: https://www.dca.ga.gov/georgia-historic-preservation-division/review-compliance

Use this Link to Access the Online Project Submittal Portal

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

Questions?

Email ER@dca.ga.gov



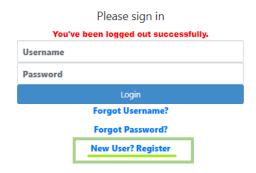
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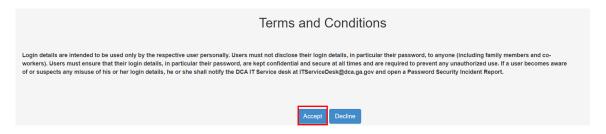
Create an External User Profile

To access the external user system, you will need a user profile.

• Using the link above, from the home screen, select New User? Register

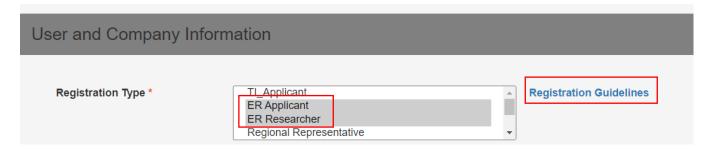


• Accept the Terms and Conditions



REGISTRATION TYPE

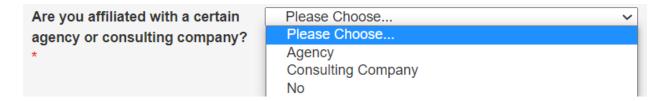
- Select the correct registration type: select **ER Applicant and/or ER Researcher** only
 - Review the "Registration Guidelines" before selecting "Registration Type," and select the correct ER external user type to match your circumstances – either ER Applicant and/or ER Researcher only.



- "ER Applicant" = user who submits projects to HPD for review
- "ER Researcher" = user who is a Secretary of the Interior (SOI)qualified historic preservation/archaeology professional that needs research access to existing HPD projects—ER Researcher applicants must provide requisite documentation with their application, such as a

- curriculum vitae, per the registration guidelines and be approved for researcher access
- SOI-qualified professionals may register as an ER Applicant <u>and</u> an ER Researcher if both roles are necessary.
- *If both roles are necessary, select both in a single registration.*
- If only one role is necessary, select the single necessary role
- When <u>searching</u> for existing projects in the system and registered as both, the ER Researcher role takes precedence.

AFFILIATION



- Select the correct affiliation:
 - NOTE: Affiliation relates to the user's employer rather than which agency is involved with a project the user will submit for review.
 - Agency = affiliated with (i.e., employed by) a Federal or State agency (only) and submitting projects on behalf of the agency (this affiliation is NOT for those associated with local governmental entities)
 - If your federal or state agency is not in the pull down list (i.e., CDC, FAA, FEMA, GDOT, GSA, GA Board of Regents, DNR, NRCS, TVA, USACE, or USFS), choose "Other"
 - Consulting Company = affiliated with (i.e., employed by) an environmental/preservation/engineering consulting company and submitting projects (regardless of which agency is involved) on behalf of the consulting company
 - Select the applicable consulting company from the drop-down menu provided
 - **Don't see the applicable consulting company?** Contact <u>ER@dca.ga.gov</u> and request the company be added to the list before moving forward with the profile registration
 - If the applicable consulting company is found in the drop-down menu, please enter the company name as it appears in the drop-down list in the "Organization/Company Name" field for consistency.
 - No = users that fall into any other affiliation category, including those associated with/submitting projects on behalf of a local governmental entity

SECRETARY OF THE INTERIOR'S PROFESSIONAL QUALIFICATION STANDARDS

• Select the correct Secretary of the Interior's (SOI) professional qualification status if registering as an ER Researcher (must be SOI-qualified)



- No = you are not SOI-qualified
 - SOI-qualifications standards can be found here:
 https://www.doi.gov/pam/asset-management/historic-preservation/pqs
- Yes = you are a SOI-qualified professional
 - ER Researchers are required to upload a curriculum vitae (CV) or resume that clearly demonstrates that you meet the appropriate SOI professional standards using the Document Upload frame at the bottom of the registration page.



• Complete the required (*) "Captcha" item



FILL OUT THE FORMS

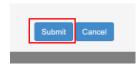
• Complete the required (*) profile information items:

First Name *	
Middle Name	
Last Name *	
User Name *	
Password *	
Confirm Password *	
Security Question *	Please Choose 🔻
Security Answer *	
Email Address *	
Phone Number (Numbers only - no dashes or special characters) *	

• Complete the required (*) agency/organization/company affiliation information items:

Organization/Company Name	
Title	
Address1 *	
Address2	
City *	
State *	Please Choose 🗸
Zip *	-
Phone Number and Ext (Numbers only - no dashes or special characters) *	

• Submit your user registration



- o HINT: Don't use dots or dashes in the username you choose
- o **NOTE:** Access to the system <u>is not immediate</u> upon your submittal of the registration application.
 - *HPD/ER staff reviews new registrations regularly.*
- Your registration must be approved before you can research, create projects, or submit applications in the external system.
- You will receive an email from the system confirming approval by HPD/ER of your registration, once approved.
 - Check your junk/spam inbox if more than 48 hours passes with no email communication from the system.

ER APPLICANT

- When logged in as an *ER Applicant*
 - o ER Applicants have the ability to create new projects in the system
 - Use the guidance found in this document to create new projects or add new submittal materials to existing projects
 - o By default, the ER Applicant can view and interact with all projects that have been submitted (uploaded) by the individual logged-in ER Applicant
 - o If the ER Applicant has selected an **AGENCY** affiliation during the registration process (i.e., the external user is associated with/submits projects on behalf of a particular agency), then the ER Applicant can view and edit/respond to projects, including the RFI and RFI details/links, that are connected with the projects, associated with that agency
 - o If the ER Applicant has selected a **CONSULTING COMPANY** affiliation from the drop-down menu during the registration process (i.e., the external user is associated with/submits projects on behalf of a consulting company found in the drop-down menu), then the ER Applicant can view and edit/respond to projects, including the RFI and RFI details/links, that are connected with the projects associated with that company
 - **Don't see the applicable consulting company?** Contact <u>ER@dca.ga.gov</u> and request the company be added to the list before moving forward with the profile registration
 - ER Applicants that have noted "No" affiliation can only interact with/view/respond to projects, including the RFI and RFI details/links, that the individual ER Applicant has created in the system
 - ER Applicants will be able to view the RFI and RFI details/links for the projects that are associated with the logged-in external user, or if the ER Applicant has selected an agency or consulting company (as noted above)
 - o If the ER Applicant affiliated with an agency or consulting company is searching for an older project in the system, please note that not all ER projects have been digitized and uploaded to the system, so the ER Applicant will need to reach out to ER staff to determine if older materials are available to be digitized and uploaded to the system.
 - Contact <u>ER@dca.ga.gov</u> if project materials are not currently available for viewing in the system and allow at least 10 business days for HPD/ER Staff to process those requests.

• Send all system-related questions to <u>ER@dca.ga.gov</u>

ER RESEARCHER

- When logged in as an *ER Researcher*
 - o ER Researchers CANNOT create new projects in the system.
 - o ER Researchers, once approved, can view <u>all</u> ER project materials that have been uploaded to the system and have not been redacted, including project submittals and responses, in read-only mode.
 - o If the external user has been registered only as an ER Researcher, then the external user will not be able to see the RFI and RFI detail links within each project dashboard that are available to ER Applicant users.
 - o If the ER Researcher is searching for an older project in the system, please note that not all ER projects have been digitized and uploaded to the system, so the ER Researcher will need to reach out to ER staff to determine if older materials are available to be digitized and uploaded to the system.
 - Contact <u>ER@dca.ga.gov</u> if project materials are not currently available for viewing in the system and allow at least 10 business days for HPD/ER Staff to process those requests.
 - Send all system-related questions to ER@dca.ga.gov

Create a New Project

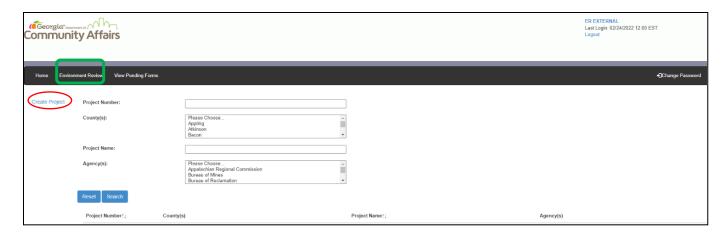
Only users registered as an **ER** Applicant can create a new project.

A <u>new</u> initial project must be created in order to submit <u>new</u> project materials and supporting documentation to the system for HPD/ER review. The project information/materials uploaded to the system CANNOT be edited once submitted. Additional items cannot be uploaded to an existing submittal once the "Submit" button is selected. Do not attempt to revise an existing submittal by creating an additional submittal – please contact <u>ER@dca.ga.gov</u> to request technical assistance with submittal revisions.

In the system, the ER Applicant can see that a project has been submitted, the date the project was submitted, and the date HPD/ER's review period ends. ER Applicants are also able to create additional submittals within the project, if needed. Contact <u>ER@dca.ga.gov</u> to request technical assistance.

NOTE: The review period "clock" starts when correct and complete project materials are successfully submitted to the ER External System for review by the ER team.

- To create the project, navigate to the Environmental Review tab on the Ribbon menu at the top of the screen (see screen capture below)
- Select the "Create Project" link on the left side of the window (see screen capture below)
 - The "Create Project" submission will ask basic questions about the project and project contacts

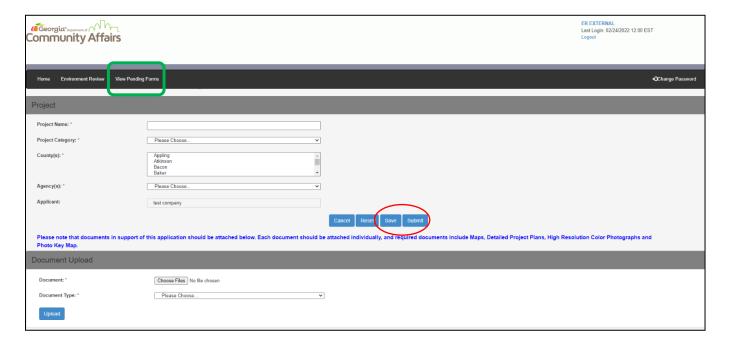


- The above screen capture illustrates the external user's main landing page or "dashboard"
 - Projects submitted by the individual external user will be visible on this landing page/dashboard once the project has been "accepted" for review by the ER team (see further details below).
 - **NOTE:** The system will time out after 45 minutes have elapsed (there will be a warning pop-up before this happens) and information input into the system up to that point, if not saved before the time-out, may be lost. We recommend saving the submittal regularly as you proceed.
- Be sure to indicate the correct county(ies) in which the undertaking will occur. Multiple counties can be selected by holding the CTRL key on the keyboard and selecting the necessary counties from the list.
 - For FCC-related projects: the county should indicate the *location of the parent* tract. Multiple counties should not be selected for FCC projects unless the parent tract overlaps a county line.

REQUIRED FIELDS

- Fill in required fields (*) and attach the required documents (*) (see screen capture below)
 - Note that this is an important step that may impact the ER Applicant's ability to submit the project if all required document types are not appended.
 - Note that each document type must be uploaded separately, not as a single PDF as required by the email submittal process, and include:
 - Location maps * (with street names visible)
 - High resolution current, color photographs * (of all building elevations, as applicable, the project site, and the project's viewshed)
 - No Google Earth or similar street views or tax assessor photos accepted
 - In lieu of individual photo files, A PDF with two images per page is acceptable
 - Photo key site map and/or floor plan *
 - Detailed project plans/scope of work * (i.e., site and landscape plans, elevation drawings, project activities, scope of work narrative, etc.)
 - Environment Review form, as applicable

- Cultural Resources Report, as applicable
- Archaeological Survey Report, as applicable
- Historic Resources Survey, as applicable
- File types supported by the system include:
 - Word
 - PDF
 - JPEG
 - JPG
 - PNG
- **HINT:** Identify each document with a unique file name; do not use periods (dots) in a file name



SAVING THE PROJECT

- Select the "Save" button if you need to pause the project submittal process
 - When "Save" is selected, the project will be moved from the "Create Project" window to "View Pending Forms" window so that the project submittal process can be finished later
 - You can find your saved projects in the "View Pending Forms" window (see screen capture above)
 - Please Note: Saving documents in this window is temporary and this window cannot be used for long-term document storage. <u>Documents will</u> automatically be deleted after 10 business days have elapsed.
 - o Selecting "Save" does not submit the project materials to HPD/ER for review
 - Once saved, the required (*) items can be changed within the saved draft <u>BEFORE</u> selecting "Submit"

SUBMITTING THE PROJECT

- Once project creation is complete, select the "Submit" button
 - o "Submit" will send your project materials to HPD/ER for processing
 - ER Applicants can successfully submit a project for review only when **all** required documents are appended; the system <u>will not allow project submission</u> if a required document has not been appended.
 - Contact <u>ER@dca.ga.gov</u> to discuss project submittals that include document types that do not meet the system requirements.
 - Once the ER Applicant selects the "Submit" button, the information in this section <u>CANNOT be changed</u> and additional documents <u>CANNOT be uploaded</u>. Please ensure that all project details, including federal/state agency and county, are correct and that all pertinent documents have been uploaded <u>before</u> selecting the "Submit" button.
 - To successfully "Submit" a project to HPD/ER for review, all required fields, and uploads (*) must be complete; resolve all error messages related to field/upload completeness before submitting materials for review
 - Submitted projects will no longer be visible in the "View Pending Forms" window; submitted projects will be visible on the ER Applicant's main landing page/dashboard only after the project has been processed for review by the ER team
 - The ER team processes new project submittals on a regular basis. Please note: the review period clock starts upon the ER Applicant's successful submittal of the project, not the date the project is processed by the ER team

TECHNICAL ASSISTANCE

- If technical assistance is needed to revise project materials once the "Submit" button has been selected, please email the request to ER@dca.ga.gov.
- Please <u>DO NOT</u> create an additional submittal solely to address revisions or to upload additional documents for an existing submittal in the system.

Once a project is processed by HPD/ER and ER reviewers are assigned, the ER Applicant will receive an email notification from the external system and the project will be visible in the ER Applicant's main landing page/dashboard.

The email will contain the unique project number assigned to the project. Please reference this project number in all communications related to your project.

Once the ER Applicant has received the first email from the external system, be sure to set the email inbox preferences to accept future emails from the same address so that the email inbox will not place HPD/ER system emails into a junk/spam folder. If you are expecting communication from the HPD/ER system and it has yet to arrive, check your junk/spam folder first.

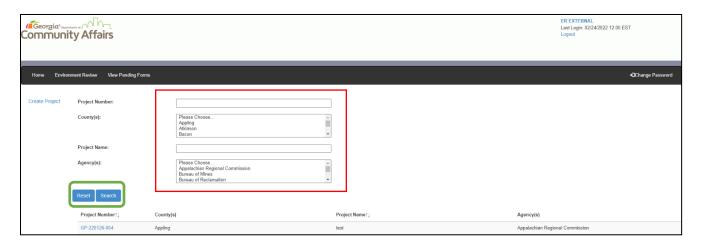
Find an **Existing Project** in the ER Online Portal

Only ER Applicants can fully access projects they have created in the external system.

An **ER Researcher** can use these same search options to conduct research using the ER external system in read-only mode.

See the discussion on pages 5 and 6 above regarding the different access ER Applicants and ER Researchers have within the system and register accordingly for the appropriate access.

• To search for a specific project, use the circled search options on the ER dashboard, as shown:



- Once the project is found, click on the hyperlink project number to go to the main project page or "Project Dashboard" (this is <u>not</u> the same as the main ER dashboard noted previously)
 - **HINTS:** The search function in this system is "finicky;" do not add spaces before or after the search term/project number and do not leave out the dashes when searching for a particular project number.
 - o Recommend using descriptive but minimal words to search project titles. For example, "Ponce de Leon Avenue" could be "Ponce" or "Leon" when searching, since "Avenue" could be in a different format ("Ave", as an example).
 - o More than one county or agency can be selected at a time

Viewing Documents within an Existing Project

Only an **ER** Applicant will have full access to view project materials they have created within a project file. An **ER** Researcher will be able to view project materials for a given project/submittal in the ER system (in read-only mode) if those materials have been released to external users by HPD/ER staff.

Not all materials will be available for release to external users by HPD/ER staff. Contact <u>ER@dca.ga.gov</u> if project materials are not currently available for viewing in the system and allow at least 10 business days for HPD/ER Staff to process those requests.

• Navigate to the Project Dashboard, as noted below, in the search section and expand the desired submittal by clicking on/within the light gray "Submittal Type" bar

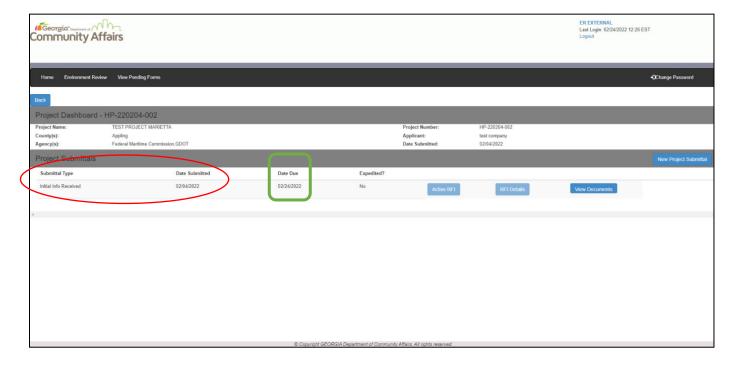


- Select the "View Documents" button under the "Project Submittals" frame
- See "Checking the Response for a Project Submittal" section below for further information related to viewing responses.

Checking the Status of a Project Submittal

ER Applicants can check the status of a project submittal.

- Navigate to the Project Dashboard as noted above in the search section
- To see the date the project was submitted/received by HPD/ER and the date of the end of the assigned review period for your project, expand the desired submittal by clicking on/within the light gray "Submittal Type" bar (i.e., in the space(s) between the submittal type and date received; a button or hyperlink cannot be used for this action see gray box above for specific location)



- HPD/ER has a mandated thirty (30)-day review period from the date of receipt.
- HPD/ER is unable to expedite project reviews due to our review volume and staff availability.
- o HPD/ER's response for your project will be sent on or before the end of your project's review period (i.e., the "**Due Date**" which is visible on your project dashboard page).
- o If HPD/ER has a question about your project or needs more information to move the review forward, the system will send you a RFI email with that inquiry (most project inquiries will come through the system and will no longer come via email directly from ER Historians, although in some instances an email or call directly from an ER Historian may be necessary).
- o See below section "Responding to a Minor Request for Information (RFI)"

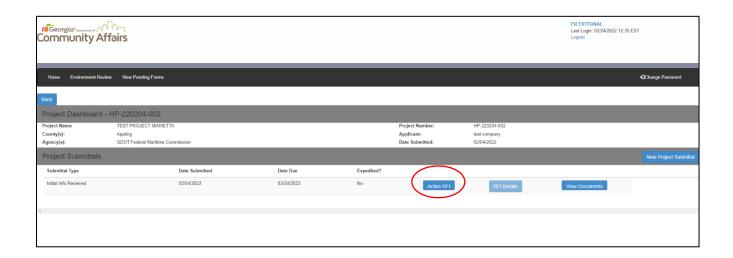
Responding to a Minor Request for Information (RFI)

Only **ER** Applicants can see and respond to RFIs within the system. If the HPD/ER reviewer has a "quick question" related to the project materials, the HPD/ER reviewer will submit that question through the system and the system will send a notification email that a RFI is pending for the project.

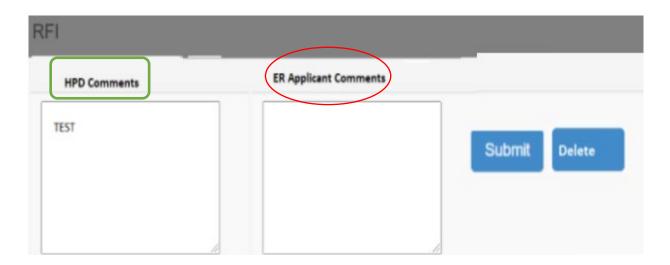
Minor RFI's can be sent by HPD/ER at any point during the review period. Minor RFI's should be addressed by the applicant as quickly as possible; if the review period runs out and a minor RFI is pending, the full 30-day review period will restart once sufficient documentation has been submitted by the ER Applicant as an additional submittal (see details below).

Other than the initial notification email, neither the HPD/ER staff nor the external system will send reminders to ER Applicants to respond to unanswered RFI's within the system.

- Navigate to the project dashboard (either through search on the main ER landing page/dashboard or via the link provided in the RFI notification email)
- Select the "Active RFI" button (see screen capture below)



- Once the "Active RFI" button is selected, a window (*see screen capture below*) will pop up: enter the requested information in the appropriate box and upload any additional documentation, as applicable, then select the "Submit" button.
- The system will alert the HPD/ER reviewer when the RFI response is submitted; any additional follow-up related to this type of RFI will be handled similarly through the system



Checking the Response to a Project Submittal

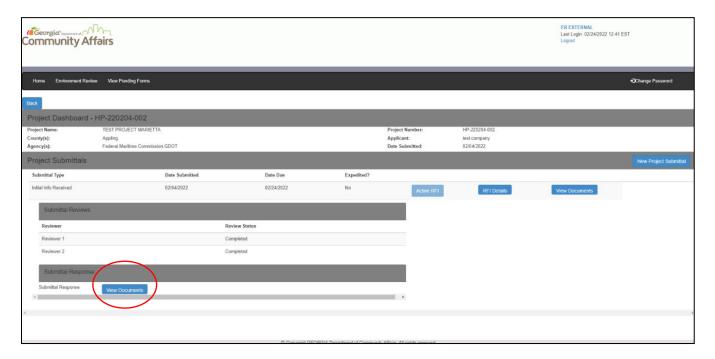
Only **ER** Applicants will receive a project response. An ER Researcher will be able to view a response as read-only for a given project/submittal in the ER system after it has been provided to the ER Applicant and if it has been released to external users.

For projects created and reviewed using the HPD/ER external system, responses will be uploaded to the project's dashboard by HPD/ER staff on or by the end of the project's assigned review period (see the information above regarding how to find the review period end date on the project dashboard). HPD/ER will provide project responses via email using the current practice on or by the end of the project's assigned review period (see above).

The system WILL NOT send an email notification to the ER Applicant when a project response is available for viewing on the project's dashboard. The response once uploaded and/or received via email from HPD/ER staff, can also be viewed on and downloaded from the project dashboard by the ER Applicant.

- Navigate to the project dashboard and expand the desired submittal by clicking on/within the light gray "Submittal Type" bar, as noted above
- Select the "View Documents" button under the "Submittal Response" frame

- O Download the response by selecting the "Download" button
- View or print the response by selecting the "View" button

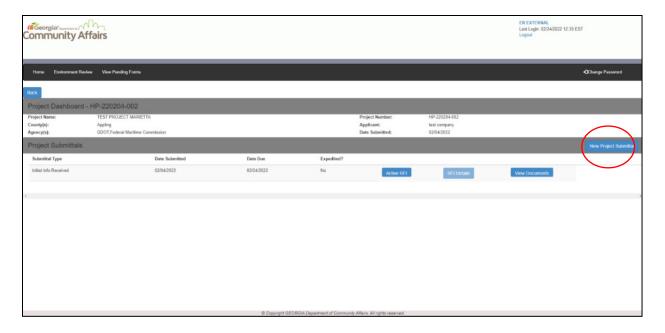


Creating a New Submittal within an Existing Project

Only **ER** Applicants can add project submittals to an existing project. If HPD/ER formally requests additional information either through an official "RFI" response letter or through conditions applied to your project, or if there is a change in the project or additional documentation needing to be submitted, the ER Applicant will need to submit additional project materials to the existing project for review.

NOTE: The review period "clock" starts when correct and complete additional project materials are successfully submitted to the ER team for review via the ER External System.

- Search for the existing project using the guidance provided above in the section entitled, Find an Existing Project in the ER Online Portal
- Navigate to the project's dashboard, as noted above
- Select the "New Project Submittal" button on the right side of the "Project Submittals" frame on the project dashboard (see screen capture below)



- The submittal type, in this instance, will default to "Additional Information" (see below) and the ER Applicant can leave the submittal type as such or customize it using the available drop-down menu.
 - Select the "Save" button in this window to move to the Pending Forms tab, if necessary
 - Note: Saving documents in this window is temporary and this window cannot be used for long-term document storage. <u>Documents will automatically be deleted after 10 business days have elapsed.</u>



- Add applicable comments to the <u>comment box</u> to explain/describe nature of the additional submittal and/or provide additional submittal details
 - If no comments are provided, HPD/ER Staff may be unable to review the submittal: please include applicable details related to the additional information being provided including the name of the ER Applicant submitting the project if affiliated with an agency
 - o All comment boxes are restricted to a maximum of 2,000 characters
- Attach the applicable documents to the additional project submittal using the "Document Upload" frame at the bottom of the page

- The system will allow the upload of multiple documents to a new submittal in an existing project; the applicant should indicate the applicable document type for each document uploaded.
- o If no documents are attached, HPD/ER Staff may be unable to review the submittal: please attach all applicable documents.
- Once the ER Applicant selects the "Submit" button, the information in this section **CANNOT be changed** and additional documents **CANNOT be uploaded**. Please ensure that all project details in the documents uploaded are correct and that all pertinent documents have been uploaded <u>before</u> selecting the "Submit" button.

Please note that documents in support of the	nis application should be attached below. Each document should be attached individually.
Document Upload	
Document: *	Choose Files No file chosen
Document Type: *	Please Choose ▼
Upload	

• Click the "Submit" button in the middle of the page when additional project materials are ready to be sent to HPD for review.



• If technical assistance is needed to revise project materials once the "Submit" button has been selected to create this submittal, please email the request to ER@dca.ga.gov. Please DO NOT create a new "Additional Information" submittal solely to address revisions or to upload additional documents.