

# Submitting Data and Tracking Review Stage

FOR FILE SEARCH, DIGITAL DATA, SMITHSONIAN NUMBER, E-CONSULTATION, NATIONAL REGISTER NOMINATION AND HISTORIC TAX CREDIT APPLICATION REVIEW REQUESTS

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

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## Create an Account and Log In to the Portal

A State of Montana **login.mt.gov** account (also known as File Transfer Service account) is required to upload documents and to review your project’s review status.

1. Create a New State of Montana Account (login.mt.gov) at <https://okta.mt.gov/Help>

If you already have a State of Montana account, log in to the portal with your existing username and password.

**Note:** SHPO cannot recover your login.mt.gov account credentials.  
**Contact SITSD for assistance:**  
sitsdsupport@mt.gov, or 406-444-2000

2. Navigate to the Cultural Resource Database: <https://svc.mt.gov/adsams/>
3. Login with your login.mt.gov credentials either by clicking the Login button in the top right banner or click Submit Data to SHPO on the top Navigation Bar and follow the links to Login.



# Prepare Documentation for Upload

Before you submit files to SHPO, be sure you have properly prepared all required documentation to expediate successful upload and review. Table 1 summarizes required documentation and additional guidance available for preparing each submission type.

Table 1. **SUBMISSION TYPES, REFERENCES, AND REQUIRED DOCUMENTATION**

SUBMISSION TYPE and REFERENCES	REQUIRED DOCUMENTATION (File Type)
<b>FILE SEARCH</b>	
Request a database query to determine presence or absence of documented sites and cultural resource inventory in an area	
Requesting File Search and Digital Data: What to Submit (QR1)	File Search Request Form: FILE-F.xlsx Map of the project area (PDF)
<b>DIGITAL DATA REQUEST</b>	
Request additional cultural resource data after a file search; must meet professional standards and sign a Data Use Agreement.	
Requesting File Search and Digital Data: What to Submit (QR1)	Data Request Form: DATA-F.xlsx Data Use Agreement (PDF)
<b>SMITHSONIAN NUMBER REQUEST</b>	
Request this required number assignment before submitting site records for Eligibility or Effect determinations	
Requesting Smithsonian Numbers for Site Records: What to Submit (QR2) Creating a Complete Site Record: Forms, Photos, Maps, and GIS	Site Record Form: CSR, AER, CUR, etc. (PDF) Photo, map attachments (PDF) GIS shapefiles (ZIP)
<b>E-CONSULTATION</b>	
Initiate project review for Federal or State undertakings by submitting required documentation.	
Montana SHPO Consultation Guide and Appendices Requesting e-Consultation / Compliance Review: What to Submit (QR3)	- Consultation Letter (PDF) - Report Submittal Form: META-F.docx - Final Inventory Report (PDF) - Final Site Forms (PDF or ZIP) - ZIP file with <u>all</u> GIS shapefiles for inventoried area, cultural resource boundaries, and changes to site boundaries as shapefiles, kmz, or kml files.
<b>NATIONAL REGISTER NOMINATION</b>	
Submit a final nomination form to Montana SHPO and ultimately the Keeper (NPS) for approval.	
<a href="#">How to complete National Register Forms</a> <a href="#">Montana Property Research Guide</a>	NR Nomination Form PDF ( <a href="https://www.nps.gov">nps.gov</a> )
<b>HISTORIC TAX CREDIT APPLICATION</b>	
Submit part 1 or part 2 documentation to apply for Historic Building Rehabilitation Tax Credits	
<a href="#">Requesting Historic Tax Credit Application Review: What to Submit (QR5)</a> <a href="#">Electronic Submission of Certification Applications (nps.gov)</a>	<a href="#">Application Forms and Instructions (nps.gov)</a>

*\*Combine multiple files of one type into a single ZIP file before upload.*

## Upload Files to Initiate Review

The **Submit Data to SHPO** link will open the DOCUMENT SUBMISSION form, where you can create a new project and upload files.

### 4. Select the Submission Type from the dropdown menu.

A unique set of instructions will display next to the dropdown menu and appropriate upload containers populate below the DOCUMENT SUBMISSION form (See Table 1).

### 5. Complete the remaining fields

- **Agency:** Select the lead agency on the project, or Agency Unknown if you don't know the agency.

- **Project Name (Submittal Name):** Limited to 50 characters including spaces. Provide a short name to reference your e-consultation submittal that will distinguish it from other submittals by your agency. We recommend including a few descriptive key words and the two-letter county code. Names for files within the submittal package should reflect this short name. (See Table 2)
- **Agency Document Number:** Your agency or firm may use a unique number to identify the undertaking that is the subject of e-consultation and review—enter that number here. This is NOT the SHPO project number.
- **Project Access Emails:** Add email addresses separated by a semicolon (;) to grant additional individuals access to this project record. These individuals will also need to create a **login.mt.gov** account.

## DOCUMENT SUBMISSION

[Instructions for Data Submission](#)

*This page is intended for agency, cultural resource personnel, or individuals to submit data to the State Historic Preservation Office for review. Please select the Submission Type Drop down menu to select the type of documentation you will be submitting. If you have any questions, please contact [mtshpo@mt.gov](mailto:mtshpo@mt.gov)*

1. Step 1: Pick a Submission Type (select different types to see which one fits your project best).
2. Step 2: Enter Agency, Agency Document Number, Project Name, Additional Project Access user.
3. Step 3: Add appropriate Data to the container(s).

Submission Type

e-Consultation

Use when seeking concurrence from SHPO regarding a project. (ie: Section 106, State Antiquities Act, or APE consultation)

Agency

Agency Document Number

Project Name

Project Access Emails

Files larger than 2GB cannot be processed. Uploads that take longer than 30 minutes will time out.

Consultation Letter

Drop files here to upload

Report Submittal Form

Drop files here to upload

Final Inventory Report

Drop files here to upload

Final Site Forms

Drop files here to upload

GIS

Drop files here to upload

Other

Drop files here to upload

Submit

\* After submitting your documents please do not close your browser until you see the blue "Processing Complete" box in each of the sections you uploaded data into. If an error occurs, contact <mailto:mtshpo@mt.gov>.

Table 2. EXAMPLES FOR NAMING A PROJECT AND FILES FOR SUBMITTAL

SUBMISSION PROJECT NAME	FILE NAMES
<p><b>REPORT TITLE:</b> Werewolf Hills Fuels Treatment Project: A Class III Cultural Resource Inventory in Lewis and Clark and Teton Counties, Montana</p> <p><b>SHORTEN TO:</b> Werewolf Hills Fuels Treatment LC TT Co (39 characters with spaces)</p>	<p>Werewolf Hills Fuels Treatment_letter.pdf            Werewolf Hills Fuels Treatment_meta.pdf            Werewolf Hills Fuels Treatment_report.pdf            Werewolf Hills Fuels Treatment_sites.zip            Werewolf Hills Fuels Treatment_GIS.zip            Werewolf Hills Fuels Treatment_other.zip</p>
<p><b>REPORT TITLE:</b> A Class III Cultural Resource Inventory for Butterfly Corp's SHPO Mine Remediation and Site Monitoring Project in Lewis and Clark County, Montana</p> <p><b>SHORTEN TO:</b> Butterfly Corp SHPO Mine Remediation Project LC Co (50 characters with spaces)</p>	<p>Butterfly Corp SHPO Mine Remediation_letter.pdf            Butterfly Corp SHPO Mine Remediation_meta.pdf            Butterfly Corp SHPO Mine Remediation_report.pdf            Butterfly Corp SHPO Mine Remediation_sites.zip            Butterfly Corp SHPO Mine Remediation_GIS.zip            Butterfly Corp SHPO Mine Remediation_other.zip</p>

## 6. Add files to the appropriate container

... either by clicking the container to search for files on your computer or drag-and-drop files. NOTE: ONE file upload per container is preferred. E.g., Upload one ZIP file containing all site record PDFs. Upload one ZIP file containing all shapefiles. Again, review guidelines for preparing your files for upload to ensure that you are meeting expectations for file size, file type, and naming conventions.

**Project created successfully, project number: 20240220001**  
PROCESSING SUBMITTED FILES

Consultation Letter	Report Submittal Form	Final Inventory Report
<ul style="list-style-type: none"><li>Processing 1 submitted files</li></ul>	<ul style="list-style-type: none"><li>Processing 1 submitted files</li></ul>	<ul style="list-style-type: none"><li>Processing 1 submitted files</li></ul>
<ul style="list-style-type: none"><li>Testing Cover Letter.pdf: File successfully transferred: Testing Cover Letter.pdf</li></ul>	<ul style="list-style-type: none"><li>Report_Metadata_Form.pdf: File successfully transferred: Report_Metadata_Form.pdf</li></ul>	<ul style="list-style-type: none"><li>Test_Report.pdf: File successfully transferred: Test_Report.pdf</li></ul>
<ul style="list-style-type: none"><li>Processing complete</li></ul>	<ul style="list-style-type: none"><li>Processing complete</li></ul>	<ul style="list-style-type: none"><li>Processing complete</li></ul>

Final Site Forms	GIS
<ul style="list-style-type: none"><li>Processing 1 submitted files</li></ul>	<ul style="list-style-type: none"><li>Processing 1 submitted files</li></ul>
<ul style="list-style-type: none"><li>Test_Site Form ACS-1.pdf: File successfully transferred: Test_Site Form ACS-1.pdf</li></ul>	<ul style="list-style-type: none"><li>GIS.zip: File successfully transferred: GIS.zip</li></ul>
<ul style="list-style-type: none"><li>Processing complete</li></ul>	<ul style="list-style-type: none"><li>Processing complete</li></ul>

## 7. Select SUBMIT button to create a new project and begin the file transfer process.

**DO NOT LEAVE THIS PAGE** until you see the message **“Processing Complete”** for each document upload container.

## 8. Check your email for SHPO Project Number

If you do not receive a confirmation email, please try your upload again or contact [mtshpo@mt.gov](mailto:mtshpo@mt.gov) for help.

## 9. Select the ‘Back to Home’ button or close your browser.

**MONTANA CULTURAL RESOURCE DATABASE**  
STATE OF MONTANA

**Project successfully created**  
**Project number: 20240220001**

Replies to this email are not monitored.

Montana Cultural Resource Database

**\*Each submittal type for a single project/undertaking will have a unique SHPO project number.** For example, a pre-consultation file search will have a different SHPO project number than the resultant e-Consultation submitted later for that same project.

**IMPORTANT! If you need to add or replace files for an existing project, DO NOT create a new project.** Instead, follow the directions below for Adding or Replacing Files for An Existing Project.

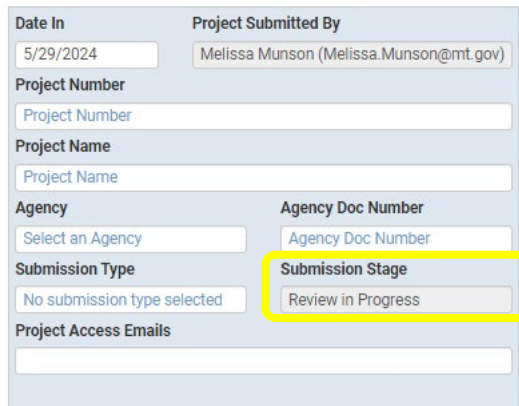
# Submission Status Notifications and Tracking

The email used to submit documentation and any emails added to the “Project Access Emails” field can login to view the submission status or add additional documentation for the project using the SHPO Project Number.

**Login > Project > Search > Enter SHPO Project Number > Click Search**

The PROJECT EDITOR form will open where you can review the project’s Submission Stage.

## PROJECT EDITOR



The screenshot shows the PROJECT EDITOR form with the following fields:

- Date In: 5/29/2024
- Project Submitted By: Melissa Munson (Melissa.Munson@mt.gov)
- Project Number: [Empty]
- Project Name: [Empty]
- Agency: Select an Agency
- Agency Doc Number: [Empty]
- Submission Type: No submission type selected
- Submission Stage: Review in Progress (highlighted with a yellow box)
- Project Access Emails: [Empty]

**Received** = Project files successfully uploaded and SHPO Project Number issued. Notified with **automated email**.

**Review In Progress** = Project has been assigned and review period is started. Notified with **automated email**.

**Review Complete** = Final determination made by SHPO Reviewer. E-Consultation is complete. No further action is needed. Notified with **official letter** from SHPO Reviewer

**Resubmission Required** = A final determination cannot be made because of insufficient or missing information, missing submittal package components, or need for clarification. When resubmitting a project, please use the same Submittal Package Name as previously submitted. Notified with **official email or letter** from SHPO Reviewer with instructions on how to proceed.

## Adding or Replacing Files for An Existing Project

**Login > Project > Search > Enter SHPO Project Number > Click Search > Edit**

- Log in to your account and select the Project Search tab.
- Enter the 9-digit SHPO project number that was sent to your email when you initiated e-consultation.
- Select Edit in the right-hand column for the project you wish to add additional data to.
- At the bottom of the screen, drag replacement files to the container. Select ‘Submit’ when finished.
- Wait for the files to upload before you close or move from the browser window.
- **If your project has already been assigned to a SHPO staff, please email them to let them know you have added the additional documentation.**

## Questions?

Contact SHPO’s Cultural Records Manager, Damon Murdo at [dmurdo@mt.gov](mailto:dmurdo@mt.gov).