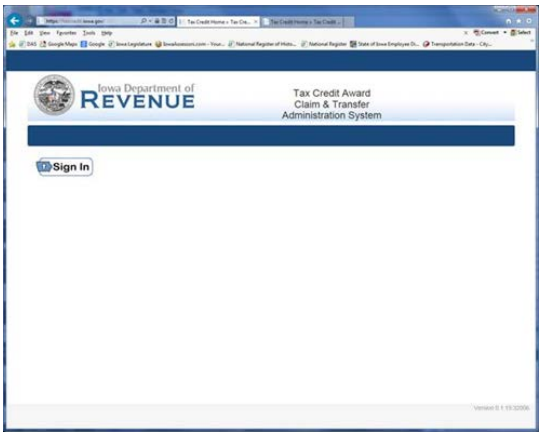


Online Application Process Introduction

Since July 2014, the State Historical Society of Iowa and the Iowa Department of Revenue have been working to create an online portal for the State Historic Preservation and Cultural & Entertainment District Tax Credit Program (HPCED). On January 26, 2015, the new online submission system, known as CACTAS, went live https://taxcredit.iowa.gov/. All application parts for the HPCED tax incentive program will now be submitted online. Information which was previously submitted on paper forms must now be entered by the applicant through CACTAS . See bullets below for "special" instructions for Amendments and 1.5 Pre-Ap Meetings. Attachments such as photos, assessor statements, Iowa Site Inventory Forms, etc. must be uploaded as separate PDF documents in CACTAS. Forms are available for download for your use via the Forms tab in CACTAS .

CACTAS Online Application Process:

- If you previously submitted a paper application and have an active project, please refer to the **CACTAS Guidance for Current/Ongoing Applications** page of this guidance. Follow those instructions for creating an account and accessing the application in CACTAS.
- If you plan to submit an application, please refer to the **CACTAS Guidance for New Applications** page of this guidance. Follow those instructions for creating an account and accessing the application in CACTAS.

More Information Request (MIR):

- If you have a current, ongoing Part 1, 2 or 3 that is on hold as an incomplete application and need to respond to a More Information Request (MIR), you must upload the information into CACTAS. Please note that even though your contact information and project name is already in CACTAS, you will need to enter all the pertinent application information, along with the MIR information so that you have your complete application uploaded into CACTAS.

Amendments Process:

- If you need to submit **Amendments** to current, ongoing projects, please email all information (use pdf attachments as necessary) to SHPOTaxCredit@iowa.gov. In the subject line please note the STC number, historic building name, Part number and Amendment number and submittal. Please separate with underscore and use "A" for amendment. Use the following format: STCxx-xx-xxx_Hank Bldg_Pt2_A2_Submittal. See "Naming Conventions for Electronic Submissions" for further information on file naming.

1.5 Pre – Ap Meeting Process:

- As of July 1, 2014, potential program applicants must schedule and attend a Part 1.5 pre-application meeting prior to submitting a Part 2 application. You must schedule the Part 1.5 meeting at least 30 days after submitting your Part 1 application by using the online scheduler, http://statehistoricpreservationofficeofiowa.fullslate.com/. After you've scheduled the meeting you must send the completed Part 1.5 form and relevant content via email to SHPOTaxCredit@iowa.gov. Use the following format in the subject line: STCxx-xx-xxx_Hank Bldg_Pt 1.5 Form Submittal. See "Naming Conventions for Electronic Submissions" for further information on file naming.

Please note:

The new Part 1, Part 2, Part 2B (Registration), Part 3 applications and instructions are now available online through CACTAS. The Historic Preservation Tax Credit Survey (required as part of the Part 3 until it is provided with-in the CACTAS online application) is available on the SHPO website (Additional Application Materials) http://www.iowahistory.org/historic-preservation/tax-incentives-for-rehabilitation/state-tax-credits/state-tax-credits-instructions.html. The sample Agreement document is forthcoming. Dates for the next Registration Period will be available on the SHPO website when they become available.

As a reminder, application parts for the Federal tax incentive program should still be submitted as per NPS guidance. (1 original, 1 readable disk containing PDF copy of all application components)

*****Be sure to refer to the Iowa SHPO website periodically for updates to the process and procedures associated with this program.*****

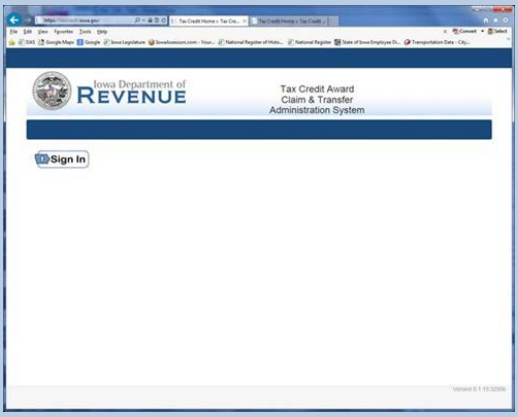
For additional information and updates: http://www.iowahistory.org/historic-preservation/tax-incentives-for-rehabilitation/index.html

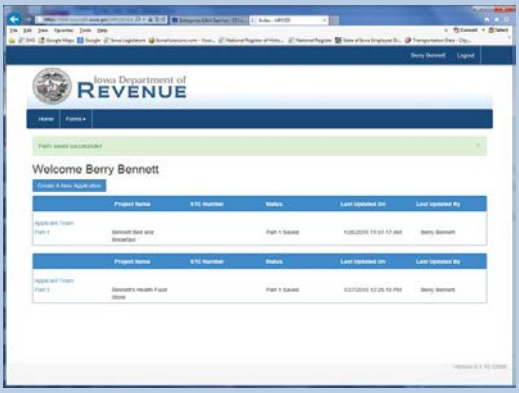
For questions about creating an A&A ID or with CACTAS, please contact: Berry Bennett at SHPOTaxCredit@iowa.gov

For general program questions, please use the following email: SHPOTaxCredit@iowa.gov

CACTAS Guidance

for Current/Ongoing Applications





For general program questions, please use the following email: SHPOTaxCredit@iowa.gov

The submission and registration system (IDR CACTAS) for the State Historic Preservation and Cultural & Entertainment District Tax Credit Program (HPCED) is available online. All new A&A users must create an ID to enter and use CACTAS; please follow the below instructions. If you have questions or problems during the process, please contact: SHPOTaxCredit@iowa.gov.

To sign in, you will be taken to Enterprise A&A to login. If you already have an A&A account, please go to step #2, if not, you will need to create an account. All logins are through: https://taxcredit.iowa.gov. Signing up for an A&A account will provide access to the full application process, which includes instructions.

NOTE: *There are 3 levels of privileges within CACTUS;*

1. *Applicant and/or Project Manager (both require A&A Accounts)*
   - *Controls Applicant team, can set up new projects and had full access to application*
2. *Applicant Project Team Member (requires A&A Account)*
   - *has full access to application*
3. *Email List member (no A&A Account required)*
   - *Does not have access into the applications or submitted documents, but receives email correspondence at status changes (submitted, approved, request for more information etc.) to keep informed of the status of the project.*

Who should create an A&A account:

- Owner/Applicant
- Project Manager
- Applicant Team Members
  1. Team Members must create their own A&A account
  2. Team Members must provide to the Owner/applicant and/or Project Manager their A&A ID (firstname.lastname@iowaid) and associated email (Owner/applicant and/or Project Manager needs this information to add team members to projects)

NOTE: *As you enter information, please keep in mind that those with an account who are added as Team Members will have access to view and modify applications, those added to the email list receive status notifications, but do not have access to upload or review submitted data. This data includes, but is not limited to: application information, plans, photographs, financial statements, etc.*

1. To access log-in, go to: https://taxcredit.iowa.gov
   - Click on Sign In.
   - Create account through Enterprise A&A for IDR CACTAS
2. Link current application

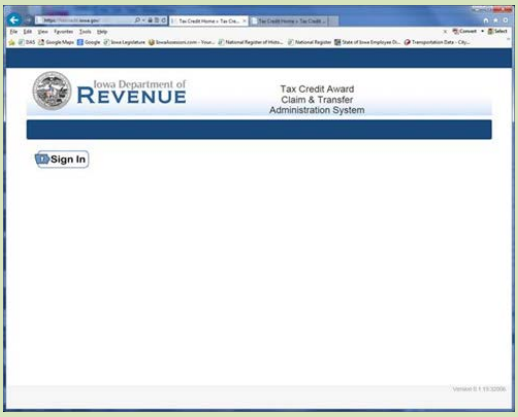
   With the projects already in progress (submitted prior to January 26, 2015), which were transferred from our old database to the new online application, we will need to link you to those projects. After you've completed the above step(s) you must send a confirmation email to SHPOTaxCredit@iowa.gov and include the following information:
   - Subject line: A&A sign-up complete
   - Your A&A ID (firstname.lastname@iowaid)
   - The email associated with the A&A account
   - List of your associated projects by STC# and building name (ex: STC14-77-521, Hank Bldg.)

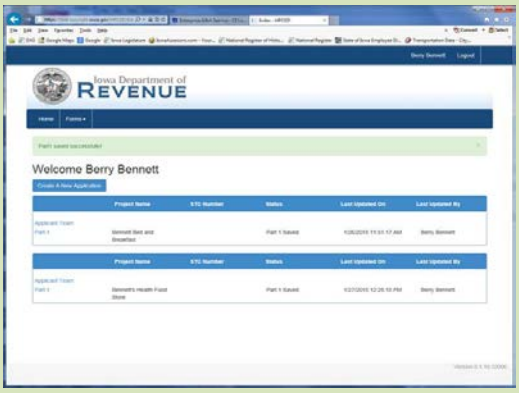
   When we receive your email, we will send a confirmation email to you that your existing projects have been linked to your account.
3. Log into IDR CACTAS at https://taxcredit.iowa.gov
   - Click on HPCED tab to create applications on your Dashboard.
4. Create Applicant Team
   - As Owner/Applicant or Project Manager, create Applicant Team
   - To the left of each project name on the dashboard is a link for applicant Team. The applicant Team is made up of the Owner/Applicant, Project Manager and designated team members. These are the people who can see and modify the online application (see note above regarding team members).
5. Begin application process. For each application, each Part must be submitted sequentially. A Part 2 cannot be submitted before the Part 1 has been acted upon by the SHPO and the 1.5 Meeting has taken place.

NOTE: *Many of the required forms are available in a drop-down menu: amendment, pre-application meeting, certification & release information, and detailed description of rehabilitation and preservation work forms; QRE schedule; window survey; financing source tool; site inventory and national register nomination forms.*

CACTAS Guidance

for New Applications





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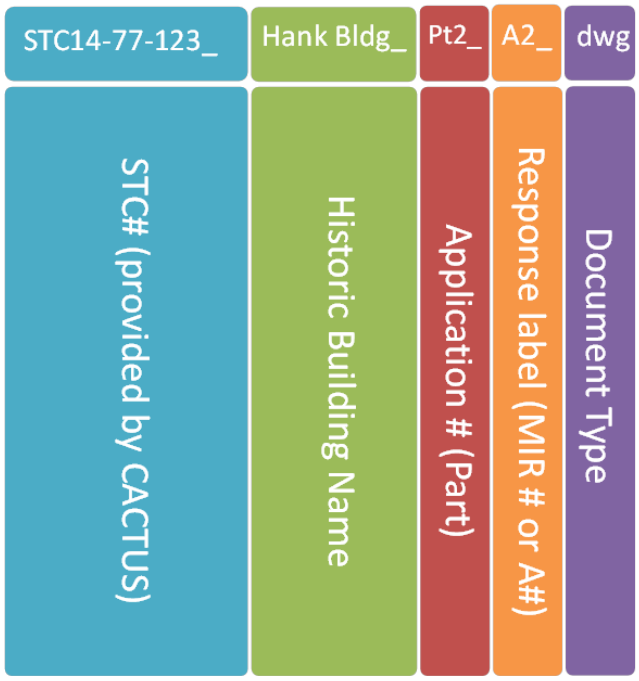
Naming Conventions for Electronic Submissions

The State Historic Preservation Office recommends the following file naming and abbreviations when submitting electronic files for submission, either through CACTAS, email, disk, flash drive, etc. This standard format will be used anytime we save and/or send out information related to a project. Using these standards will enable both the SHPO and applicants to easily determine what the project is and what the information contains. Questions, comments or suggestions should be sent to SHPOTaxCredit@iowa.gov

Example of preferred file naming: STC14-77-123_Hank Bldg_Pt2_A2_dwg for a **drawing** file being submitted for Project **STC14-77-123**; The **Hank Building**, as a supplemental attachment for **Amendment #2** for an existing **Part 2**.



STC# is provided by CACTAS when you begin an application

Historic Building Name should be identified in the Part 1 application

Application #:
Part 1 = Pt1, Part 2 = Pt2 typical

Response labels:
MIR = More Information Request
A =Amendment (A1 for first Amendment, A2 for second Amendment)

Document type preferred abbreviations:
Desc = Description of Rehabilitation
Dwg = architectural and mechanical drawings
PK = photo key
Photo = Photos
HPhoto = Historic Photos
Wind = window survey
QRE = cost estimate on QRE form

Example of email subject line for second amendment is listed below:

STC14-44-123_Hank Bldg_Pt2_A2 Review Submittal

Example of email subject line for the submittal of 1.5 Pre-Ap meeting submittal is listed below:

STC14-44-123_Hank Bldg_Pt1.5_Form Submittal