

COMMONWEALTH OF VIRGINIA – DEPARTMENT OF HISTORIC RESOURCES  
VIRGINIA HISTORIC REHABILITATION TAX CREDIT PROGRAM

## APPLICATION CHECKLIST

Use the following checklists to ensure that your State or Federal application is complete. Please check your application carefully, as incomplete applications will not be reviewed until the appropriate information is received.

**FAILURE TO SUBMIT A COMPLETE APPLICATION MAY RESULT IN REVIEW DELAYS.**

**STATE REVIEW FEE:** Refer to the Fee Schedule to calculate the review fees for the State Part 2 and Part 3 applications. A **check** for the State review fee must be submitted in accordance with the instructions on the Fee Schedule at the same time the application is submitted. At this time we are unable to accept cash or credit cards for review fees.

**FEDERAL REVIEW FEE:** Once the State review is complete and the application has been forwarded to the National Park Service (NPS), NPS will issue an electronic invoice for the Federal review fee to the owner/applicant using the email provided in the application. Please note that this is the only way to pay the Federal program review fees.

**NOTE:** For properties protected by a DHR easement, **please submit an additional copy of all materials.**

**NOTE:** For both the State and Federal Programs, please be sure to use the application forms that have a **2023 revision date.**

### APPLYING FOR THE STATE TAX CREDIT ONLY

#### Part 1: Evaluation of Significance

- One (1) State Part 1 application** with owner's **original signature** on current form (revised 2023).
- One (1) aerial photo map** locating property within the boundaries of the historic district. For individually-listed properties, submit an aerial photo map locating the property. Contact DHR for assistance with maps if needed.
- One (1) copy of the following National Register Nomination Form pages:** (*available from DHR's website*)
  - The first page of the Nomination Form.
  - The page from the Section 7 inventory that lists the property (if available).
  - The page showing the period of significance for the historic district or property.
  - The page with the first paragraph of the statement of significance for the historic district or property.
- One (1) set of photographs:** Photos must be color, well-lit and clear, a minimum size of 4"x6", and should show streetscapes/context, all sides of the building, major interior spaces, and any specific, character-defining features prior to rehabilitation. See the "Photographic Standards" document for additional guidance. **Please do not insert the photos into plastic photo sleeves** – they should be rubber-banded, clipped, or placed together in an envelope.
- One (1) photo key:** Key numbered photo locations to current floor plan drawings and, if applicable, to a site plan.

**Note:** A Part 1 application is required for all projects unless the property has only one building and that building is individually listed on the Virginia Landmarks Register.

#### Part 2: Description of Rehabilitation

- One (1) State Part 2 application** with owner's **original signature** on the current form (revised 2023). A complete State Part 2 application must include both the "Cover Sheet" and the "Narrative Description of Work" documents.
- One (1) set of photographs:** Photos must be color, well-lit and clear, a minimum size of 4"x6", and show the condition of the building prior-to the rehabilitation. All areas where significant work is proposed should be documented. See the "Photographic Standards" document for additional guidance. **NOTE:** If submitting both the Part 1 and Part 2 at the same time, you may submit only one set of photos and key for both the Part 1 & Part 2.
- One (1) photo key:** Key numbered photo locations to current floor plan drawings and, if applicable, to a site plan.
- One (1) set of drawings showing the existing floor plan** (not-to-scale drawings are acceptable).
- (If applicable) **One (1) set of drawings** showing the proposed floor plan (no-to-scale drawing are acceptable).
- For Phased projects, a Phasing Plan outlining work proposed for each Phase, the approximate cost for each Phase, and the start and end dates for each Phase. See the "Project Phasing" document for additional guidance.
- State review fee check**, and a completed "Fee Schedule" form.

#### Part 3: Request for Certification of Completed Work

- One (1) State Part 3 application** with the owner's **original signature** on the current form (revised 2023). Please take note of all instructions and guidance text on the Part 3 form.
- One (1) set of photographs:** Photos must be color, well-lit and clear, a minimum size of 4"x6", and show the condition of the building after the rehabilitation. All areas - both where significant work was completed and where no work was completed - should be documented, and it is recommended to try and match the photo locations to those shown in the Part 2 photos. See the "Photographic Standards" document for additional guidance.
- One (1) photo key:** Key numbered photo locations to current floor plan drawings and, if applicable, to a site plan.
- State review fee check**, and a completed "Fee Schedule" form.
- One (1) copy of State Part 1 Certification Letter.**
- Cost certification** by an independent Certified Public Accountant. See the "State Financial Certification Requirements" document for additional guidance.

## APPLYING FOR BOTH STATE & FEDERAL TAX CREDITS

- TIPS:**
- When applying for both the State and Federal Programs, the Virginia Department of Historic Resources uses the Federal Application forms for the Part 1, Part 2, and Amendments. The State Program requires the use of DHR's Part 3 application. All current forms should have a **2023 revision date**.
  - First submit **ONE (1) hard copy, with wet-ink signature on the first page**, of the application materials to DHR.
  - Once DHR Staff has reviewed the hard copy for completeness, the Tax Credit Specialist will send an email to the project contact with instructions on uploading an **identical** electronic file to DHR's online file portal.
  - The electronic copy must include all materials already submitted to DHR, **plus a NPS Transmittal Log**.
  - The electronic files must follow the formatting guidance found on the NPS website, which can be viewed at: <https://www.nps.gov/subjects/taxincentives/hpca-electronic-submission.htm>.

### Part 1: Evaluation of Significance

**IMPORTANT: First only submit one hard copy of all materials to DHR. Once the hard copy has been checked-in, staff will follow-up by email with instructions for the submission of an identical, electronic copy of the application materials.**

- One (1) Federal Part 1 application form** with owner's **original signature** on the first page.
  - One (1) aerial photo map** locating property within the boundaries of the historic district. For individually-listed properties, submit an aerial photo map locating the property. Contact DHR Staff for assistance if needed.
  - One (1) copy of the following National Register Nomination Form pages** (available from DHR's website):
    - The first page of the Nomination Form.
    - The page from the Section 7 inventory that lists the property (if available).
    - The page showing the period of significance for the historic district or property.
    - The page with the first paragraph of the statement of significance for the historic district or property
  - One (1) set of photographs:** Photos must be color, well-lit and clear, a minimum size of 4"x6", and streetscapes/context, all sides of the building, major interior spaces, and any specific character-defining features prior to rehabilitation. See the "*Photographic Standards*" document for additional guidance. Please do not insert the photos into plastic photo sleeves – they should be rubber-banded, clipped, or placed together in an envelope.
  - One (1) photo key:** Key numbered photo locations to current floor plan drawings, and if applicable, to a site plan.
  - (Federal electronic submission only) **One (1) Transmittal Log.** Please see the NPS website for an Example Transmittal Log.
- Note:** A Part 1 application is required for all projects unless the property has only one building and that building is individually listed on the National Register of Historic Places.

### Part 2: Description of Rehabilitation

**IMPORTANT: First only submit one hard copy of all materials to DHR. Once the hard-copy has been checked-in, staff will follow-up by email with instructions for the submission of an identical, electronic copy of the application materials.**

- One (1) Federal Part 2 application form** with owner's **original signature** on the first page. The application must include a complete narrative description of all proposed rehabilitation work, describing the building's existing features and the impact of proposed work on these features. Work to all buildings/structures, the site, and any new construction must be included.
- One (1) set of photographs:** Photos must be color, well-lit and clear, and show the condition of the building prior-to the rehabilitation. See the "*Photographic Standards*" document for additional guidance.  
**NOTE:** If submitting both the Part 1 and Part 2 at the same time, you may submit only one set of photographs for both.
- One (1) photo key:** Key numbered photo locations to current floor plan drawings, and if applicable, to a site plan.
- One (1) set of Drawings** showing the **existing floor plan** (not to-scale drawings are acceptable).
- (If applicable) **One (1) set of drawings** showing the **proposed floor plan** (not to-scale drawing are acceptable).
- For Phased projects, a **Phasing Plan** outlining work proposed for each Phase plus approximate cost and start and end dates for each Phase. Please see the "*Project Phasing*" document for more information.
- (State submission only) **State review fee check** and a completed "*Fee Schedule*" form
- (Federal electronic submission only) **One (1) Transmittal Log.** Please see the NPS website for an Example Transmittal Log.

### Part 3: Request for Certification of Completed Work

**IMPORTANT: First only submit one hard copy of all materials to DHR. Once the hard copy has been checked-in, staff will follow-up by email with instructions for the submission of an identical, electronic copy of the application materials.**

- One (1) State Part 3 application form** with owner's **original signature** on the second page.
- One (1) Federal Part 3 application form.**
- One (1) set of photographs:** It is recommended to try and match the photo locations to those shown in the Part 2 photographs. See the "*Photographic Standards*" document for additional guidance.
- One (1) photo key:** Key numbered photo locations to current floor plan drawings, and if applicable, to a site plan.
- (State submission only) **State review fee check** and a completed "*Fee Schedule*" form.
- (State submission only) **One (1) copy of the State Part 1 Certification Letter.**
- (State submission only) **One (1) Cost Certification** by an independent Certified Public Accountant. See the "*State Financial Certification Requirements*" document for additional guidance.
- (Federal electronic submission only) **One (1) Transmittal Log.** Please see the NPS website for an Example Transmittal Log.