

# Submitting Site Records / Requesting Smithsonian Numbers

## CHECKLIST 2



This checklist summarizes steps and provides tips for successfully submitting cultural site records and requesting Smithsonian numbers from Montana SHPO. Before proceeding with this checklist, ensure that you understand the context, criteria, and expectations for requesting Smithsonian numbers provided in Section 2.3.2 of the Montana SHPO Consultation Guide.

**Remember:** Smithsonian number assignments **require** a complete site record and GIS shapefiles that accurately delineate the site boundary. As described in the guide, complete site records include: the appropriate site form, photographs of the site and features, a site location map (1:24,000 scale), and a sketch map sites with three or more features. **If you have any questions, would like any clarification, or more detailed guidance, please contact the [Cultural Records Assistant](#).**

### STEP 1. DOWNLOAD CURRENT SITE FORMS AND INSTRUCTIONS

Forms and instructions for completing a Cultural Site Record (CS-R), Architecture/Engineering Record (AE-R), and Site Update (CU-R) are available for download at <https://mhs.mt.gov/Shpo/Forms>. Ensure that you are using the most current version of SHPO forms by checking the website often.

[Cultural Sites \(CS-R\)](#)

[Architecture/Engineering \(AE-R\)](#)

[Site Record Updates \(CU-R\)](#)

1. **Complete CS-R or AE-R form.** Follow instructions to complete all applicable sections of the CS-R (Cultural Site Record) or AE-R (Architecture and Engineering Record) forms.
2. **Create a map(s)** that delineates site boundaries and features (for sites with three or more features).
3. **Collect photographs** that show the site location, features, and other details.

## STEP 2. PREPARE SITE RECORD FILES FOR UPLOAD

1. **Combine completed site record forms, photos, and maps into a single PDF file** for each site. Other file formats will not be accepted. If the site already has a Smithsonian number, name this file using the trinomial format; e.g., 24LC0123.pdf.
2. **Prepare a GIS shapefile of the site boundary.** Google Earth kml and kmz files are also accepted. Please contact the [Cultural Records Assistant](#) for more information regarding mapping in Google Earth, or instructions for exporting shapefiles. Note: Presenting all boundaries as separate features within a single shapefile is acceptable, as long as there is an identifying attribute (Temp No. etc). There is no need to spend the time exporting each boundary separately.
3. **Zip your files** to save significant upload time if you are submitting multiple site records and GIS files. Highlight all the files you want to combine, right click anywhere in the highlighted area (make sure all the files remain highlighted), select “Send to” from the pop-up menu next to your mouse pointer, then select “Compressed (zip) folder”. A new folder will be created with the same name, but with a \*.zip file extension.

## STEP 3. SUBMIT DIGITAL AND HARDCOPY FILES

To receive a Smithsonian number, both paper and digital copies of site records must be submitted to Montana SHPO. However, if you are submitting site records with a respective cultural resource inventory report for compliance review, there is no need to send an additional paper copy.

### Mail complete hardcopy site records to:

Cultural Records Assistant—PO Box 201201—Helena, MT 59620-1201  
Site forms should include color photographs and maps.

For digital site record PDFs (form, photos, maps) and GIS files with a total size less than 5 MB, you can email files to the [Cultural Records Assistant](#). Files of any size can be submitted through the [State of Montana – File Transfer Service](#) or the Montana SHPO Portal. Instructions for using these services are provided below.

### How to Upload Files with the State of Montana File Transfer Service

1. Create a free State of Montana File Transfer Service (FTS) account: follow the instructions online <https://transfer.mt.gov/Home/Login>, or contact the [Cultural Records Assistant](#) for help. Instructions are also available on the FTS sites.
2. Once you are logged in to FTS, click on “Send a new file”
3. Drag and drop, or click on the shaded area to select and upload a single PDF (form, photos, maps) and GIS shapefiles for each site. Multiple site records and GIS files can be compressed into a ZIP folder for improved upload time. Note: Uploading folders is not supported by FTS, only 10 files can be uploaded at a time, and files exceeding 2 GB within a zip file may experience virus scanning issues. Once your files have completed uploading, click on “Continue”
4. Next, select “State Employee or login.mt.gov Customer”, then search for or enter the email address of the desired recipient.
5. In the “Message” area include your name and phone number along with any additional information or comments, then click “Send”.
6. You should receive a “Sent Receipt” indicating upload success and delivery to the addressee. Retain this receipt for your records.
7. **Allow up to one week for processing Smithsonian number requests.** Site records will be checked for accuracy of information such as legal locations, site form categories, map content, and overall completeness. You will be notified when we’ve assigned your new Smithsonian site number.

## How to Upload Files with Montana SHPO's Portal

Montana SHPO's Portal is the preferred method when submitting site records along with a cultural resource inventory report. For an efficient upload experience, organize files for your submittal package into three file folders: 1. Report Documents, 2. Site Forms, 3. GIS Files.

**Step 1** – To submit digital data (e.g., reports, site records, GIS files) through our portal, you will need to create a State of Montana [File Transfer Service account](#). Once you have a file transfer account, proceed to step 2.

**Step 2** – Go to <https://svc.mt.gov/adsams/> and click on **Submit Data to SHPO** on the task bar.



**Step 3** – LOG IN to your State of Montana [File Transfer Service account](#)



<https://transfer.mt.gov/Home/Login>

**Step 4** – On the DOCUMENT SUBMISSION page, select the appropriate Agency, Consulting Firm, and a Project Name/Number.

### DOCUMENT SUBMISSION

#### Instructions for Data Submission

*This page is intended for agency, or cultural resource personnel, to submit their required digital data to the State Historic Preservation Office for review. Paper documentation should be submitted with a cover letter stating when digital was uploaded. If you have any questions, please contact [dmurdo@mt.gov](mailto:dmurdo@mt.gov)*

Agency  Consulting Firm  Project Name/Number

Please have CRIS forms submitted separately from the Report Document

**!! Agency and Project Name/Number are required fields. Project name/number must match the paper copy of the report submitted to SHPO.**

**Step 5** – DRAG AND DROP files: Reports, site record forms, GIS files need to be submitted separately and in the appropriate box.

#### SEND FILES:

Report Documents

Drop files here to upload

Site Forms

Drop files here to upload

GIS Files

Drop files here to upload

Submit

\* After submitting your documents please do not close your browser window until you see the blue processing complete box in each of the three columns.

**Step 6** – Once all your files have been dropped into the appropriate boxes click on the green SUBMIT button.

**Step 7** – After submitting your documents and you see the “File successfully transferred” and “Processing complete” messages you can close your browser.

File successfully transferred:  
Processing complete