

## INTRODUCTION

This document provides quick start instructions for completing the Bus Transit and Rail Transit Project Detail forms. The purpose of these forms is to ensure that a complete project description and adequate supporting data are provided for SMART SCALE analysis.

Each form is designed to group improvements spread across multiple routes or service lines into as few forms as possible. For example, details for a project including upgrades to bus stops, purchase of new buses, increased route frequency, etc. for multiple routes can be in a single form. Each route impacted by a given set of improvements will have its own page or pages within that one form.

## COMPLETING A FORM

### Use the Right Reader®

Both forms require Adobe Acrobat Reader 11 or DC. The first page of each form is a prompt to verify the pdf viewer being used. Clicking **Continue** while using a compatible viewer will clear this page and allow the user to begin filling in the form.

### Get Started

For each form, the user will complete an improvement-level data page, providing information, such as improvement description and need, that will apply to most or all routes/services described in the worksheet. This page should be filled out **COMPLETELY and CORRECTLY** before clicking the button labeled **Add New or Impacted Route/Service**. The user's selections in the checkboxes in the middle of the page will determine which sheets are generated each time the user clicks **Add New or Impacted Route/Service**. Once pages are generated they *cannot be deleted*, so it is very important that the right selections from the beginning.

### Attachments

The user may click any of the **Attach** buttons at any time to attach files of any type directly to the pdf. When the user uploads the completed form to SMART Portal, the attached files will be uploaded with it, packaged into a single file. Users are strongly encouraged to attach required files (eg. Transit Development Plan, KML of route maps, etc.) prior to clicking **Add New or Impacted Route/Service**, generating the route detail sheets. A warning message will be displayed the first time the user clicks **Add New or Impacted Route/Service** if any required files have not been attached yet. Attachments may be reviewed by clicking the paperclip icon in the Navigation Pane in Adobe Reader. If the Navigation Pane is not open, click **View→Show/Hide→Navigation Panes→Attachments**.

### Route/Service Detail Sheets

When the first page of project details is fully filled in and all required files have been attached, the user is ready to click **Add New or Impacted Route/Service**. Each time this button is clicked, one, two, or three new pages will be appended to the end of the document. For projects with multi-page route/service details, entering the impacted route/service name or number will automatically populate that information to the other corresponding sheet or sheets, helping keep track of which route or service the user is describing. The sheets that are generated are described in the following sections.

## RAIL TRANSIT FORM

Service Line details for rail transit projects will be entered on one or more copies of the following one or two pages:

### Proposed Conditions

Every rail transit project will use this page for each new or impacted service. Ridership, service frequency, service capacity, etc. for the proposed condition – the project being applied for – should be entered on these sheets.

## Existing Conditions

Only projects with improvements to existing facilities or service lines will use this page. Existing levels of ridership, service frequency, etc., as measured or estimated in the field, will be recorded on these sheets. The existing conditions sheet will only be created if the checkbox marked **Project upgrades existing route** is ticked. **NOTE:** If *some* service lines in a project are existing lines with improvements while others are brand new services, simply leave the Existing Conditions page blank (or enter ridership, frequency, etc. as 0) and type a comment in the **Additional Notes** field indicating that a given service line is new. The existing conditions sheet will only be created if the checkbox marked **Project upgrades existing service** is ticked.

## BUS TRANSIT FORM

Every bus transit improvement for a given application can be described in a single Bus Transit Project Detail Form using the appropriate combination of the following pages:

### New or Improved Transit Facility and Transit Technology Improvement

These sheets collect data for each new or improved Transit Facility or Transit Technology Improvement. These sheets are created when the checkboxes labeled **New or improved transit facility** or **New transit technology** are ticked and the corresponding [Add Transit Facility](#) or [Add Transit Technology Improvement](#) buttons are clicked. Data quantifying the improvement at the system level (eg. “installation of AVL technology on 15 routes increases peak period ridership by 10% across those 15 routes”) may be entered in the second section, or route-by-route data may be entered by clicking [Add New or Impacted Route](#) and filling out the generated sheet (or sheets) for each affected route. More than one of each type of improvement may be included by clicking the [Add Transit Facility](#) or [Add Transit Technology Improvement](#) button again for each additional improvement – just be sure to clearly indicate which facility/technology a given route is benefiting from. Once all transit facility and/or transit technology improvements are added, click [Add New or Impacted Route](#). Additional facilities/technologies cannot be added once the first new or impacted route is added, so it is important to make sure every improvement is described before clicking [Add New or Impacted Route](#).

### Bus-Only Lane

Only projects that convert an existing travel lane to a bus-only lane OR construct a new bus-only lane will use these sheets. Details that describe the *entire length* of the new bus-only lane will be entered once for each proposed bus-only lane on the bus-only lane general improvement sheet; details that describe the *portion* of the new bus-only lane *along each impacted route* will be recorded on the bus-only lane page created by clicking [Add New or Impacted Route](#). Some questions on this second page pertain to the entire route while others are specific to the bus-only portion. The Bus-Only Lane sheets can only be created by ticking the checkbox labeled **New bus-only lane (construct or convert)** and clicking [Add Bus-Only Lane](#) for each proposed bus-only lane and [Add New or Impacted Route](#) for each route impacted by one or more bus-only lane.

### Proposed Conditions

Every bus transit project will use this page for each impacted service or route. Ridership, route frequency, capacity, etc. for the proposed condition – the project being applied for – should be entered on these sheets.

### Existing Conditions

Only projects with improvements to existing routes or service lines will use this page. Existing levels of ridership, route frequency, etc., as measured or estimated in the field, will be recorded on these sheets. **NOTE:** If *some* routes in a project are existing routes with improvements while others are brand new routes, simply leave the Existing Conditions page blank (or enter ridership, frequency, etc. as 0) and type a comment in the **Additional Notes** field indicating that a given route is new. The existing conditions sheet will only be created if the checkbox marked **Project upgrades existing route** is ticked.

## SUBMITTING THE FORM

When every applicable form for a project is complete, every impacted route or service line and all required attachments are included, simply log in to SMART Portal, find and select the project application, select 'Edit Application', navigate to the 'Supporting Documents' pearl, and upload the form or forms with the Attachment Type "Rail and Transit Project Detail Form."

## QUESTIONS? ISSUES?

Contact Jared Buchanan, P.E. in the Office of Intermodal Planning and Investment at [jared.buchanan@oipi.virginia.gov](mailto:jared.buchanan@oipi.virginia.gov).