



## SMART Portal Training

August 2, 2017





## Welcome to SMART Portal

**SMART SCALE**  
*Funding the Right Transportation Projects in Virginia*

Applications About

**Transportation Alternatives**

VDOT Virginia Department of Transportation

Applications About

**Revenue Sharing**

VDOT Virginia Department of Transportation

Applications About

**Highway Safety Programs**

VDOT Virginia Department of Transportation

Applications About

**Bike Pedestrian Safety**

VDOT Virginia Department of Transportation

Applications About

**Rail Safety Improvements**

VDOT Virginia Department of Transportation

Applications About

**Systemic Safety Improvements**

VDOT Virginia Department of Transportation

Applications About

### Available Now:

- Revenue Sharing – Aug.1 – Nov. 1
- Safety Programs (4) – Aug. 1 – Nov. 1
- Transportation Alternatives – Sept. 1 – Nov. 1

### Coming Soon:

- State of Good Repair Bridges and Paving
- SMART SCALE – Round 3

## Application submission to multiple programs

- **Previous application programs enhanced**
  - Highway safety, Bike/Ped, Transportation Alternatives, Revenue Sharing
- **New application programs**
  - Systemic Safety Improvements, Highway Rail Grade Crossing Programs
  - State of Good Repair-bridges, and State of Good Repair-paving programs will be available at a later date

## Application Re-submission

- **Clone applications across programs and across fiscal year.**
  - Update and resubmit an application without having to rekey all project information.
- **Common fields**
  - Certain fields common to each application program may be cloned
  - Applications from the same program are copied

## Alerts

- **Alert *notification*** email is sent to all Submitters and Organization Administrators of the organization that created the application. The alert originator (VDOT/DRPT only) and District Validator assigned to the organization will be copied.
- **Alert *resolution*** email is sent to all Submitters and Organization Administrators of the organization that created the application. The alert originator, alert resolution originator, and District Validator assigned to the organization are copied.

## Comments

- **Comments are now organized by application section (pearl) and can be filtered by section. A read receipt has also been implemented.**

## Security

- The District Administrator role is designed to help manage user permissions. The District Administrator can create and edit organizations as well as create and edit users in an organization.

## User Interface

- Landing page adjusted to accommodate additional grant programs
- Persistent filters on dashboard grid
- Dashboard tabs reconfigured to side tabs

# SMART Portal and Transportation Alternatives



## New Functionality – Precedent/Dependent Relationships

- **Eligibility Category >> Project Concept**
- **In-Kind Match >> Provide Details and Value**
- **Responsible Person >> Project Manager**
- **VDOT Administration >> Sponsor's Ability to Administer**
- **Questions >> Attachments**

# Transportation Alternatives Enhancements

- **Other Enhancements**
  - **Added required fields to the application**
  - **Added mapping tool, Polygon**
  - **Enhanced help text**
  - **Removed question numbering**

- **Enhancements**

- **Added two new application programs**
  - Systemic Safety Improvements
  - Highway Rail Grade Crossing Programs
- **Added logic to calculate/validate requested funding and cost**
- **Mapping with LRS segment selection**

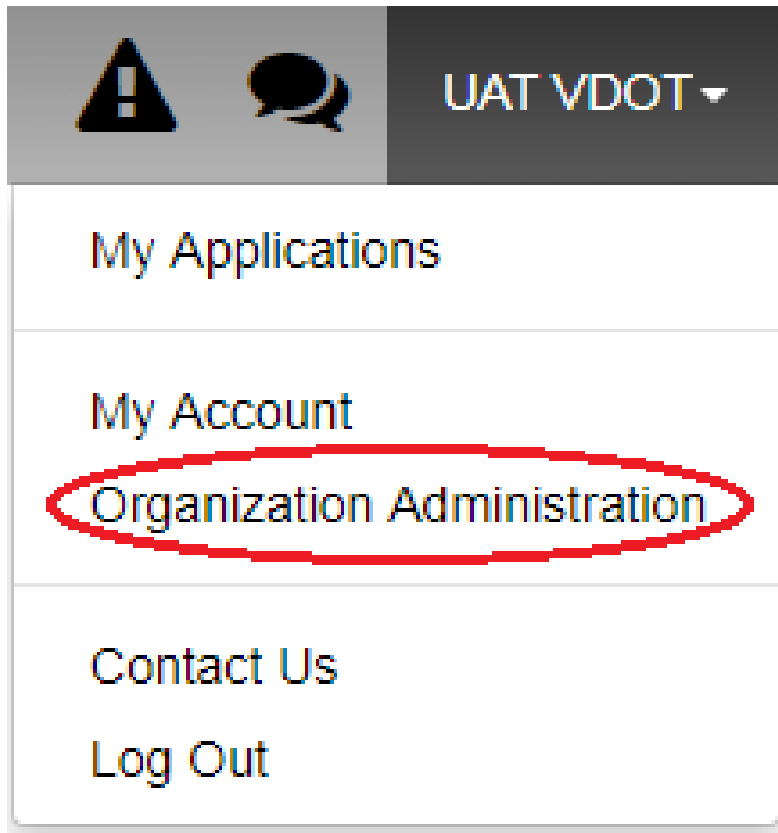


- **Enhancements**

- **Added logic to calculate/validate requested funding and cost**
- **Consolidated information to streamline process**
- **Added mapping tool, Polygons**
- **Enhanced help text**

# Administration of Organizations and Users

# 1. Organization Administrator



In order to manage users within your organization, you must have the Organization Administration Role assigned to you.

If you do not have this role, contact your District or DRPT point of contact.

In the examples provided, the Organization Administrator's name is UAT VDOT.


# Org Admin - Administration


## Organization Administration


My Organization Users

### Filter By:

Email / Name

 Search

 Reset

 Add a New User

Include Archived Users?

Email Address	Name	Archived
enelson@fredericksburgva.gov	Erik Nelson	No
brcameron@fredericksburgva.gov	beverly cameron	No
dfawcett@fredericksburgva.gov	doug fawcett	No
azizstewart@outlook.com	UAT VDOT	No

From the Organization Administration screen, you can view and edit existing users in your organization. You can also add a new user by selecting “Add a New User.”

Home Dashboard About UAT VDOT

### Organization Administration

My Organization Users

Return to Users

#### Add New User

First Name

Last Name

Email Address

Organization  
Fredericksburg City

Expand all Roles Collapse all Roles

Select Applicable System Roles

Select Applicable Program Roles

- + HB2
- + HSIP BikePed
- + HSIP Rail
- + HSIP Safety
- + HSIP SSI
- + Revenue Sharing
- + SMART SCALE
- + TA Set-Aside

Create User

- After selecting “Add a New User” complete the required information and select the applicable program role for the user.
- Each Program will expand and list the roles available.
- Select “Create User.” The new user will be added to organization.

# Org Admin - Edit Existing Users

Home Dashboard About ⚠️ 🗨️ UAT VDOT ▾

Organization Administration

My Organization Users

[Return to Users](#)

azizstewart@outlook.com

<b>First Name</b> UAT	<b>Last Name</b> VDOT	<b>Email Address</b> azizstewart@outlook.com	<a href="#">✎ Edit this User</a>
<b>Organization</b> Fredericksburg City	<b>Archived?</b> No		

[Expand all Roles](#) [Collapse all Roles](#)

**System Roles**  
Administrator

**Program Roles**  
 - SMART SCALE  
 Editor  
 Submitter  
 Viewer

To edit an existing user, select the user from the list on the Administration screen. Information about that user will display. From this screen you can view the roles they currently have by selecting “Expand all Roles.” Select “Edit this User” to change permissions or information.

# Org Admin - Edit Existing Users

Home Dashboard About ⚠️ 🗨️ UAT VDOT

Organization Administration

My Organization Users

[Return to Users](#)

azizstewart@outlook.com

**Organization** 

**Archived?**  
 No  Yes

**Select Applicable System Roles**

**Select Applicable Program Roles**  
 + HB2  
 + HSIP BikePed  
 + HSIP Rail  
 + HSIP Safety  
 + HSIP SSI  
 + Revenue Sharing  
 - SMART SCALE  
 Editor  
 Submitter  
 Viewer  
 + TA Set-Aside

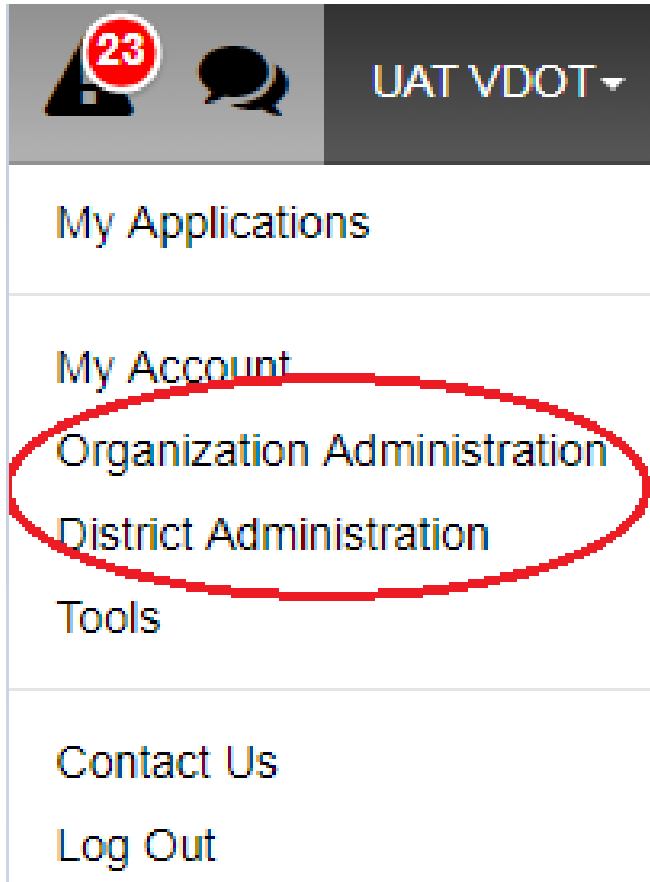
When editing, you will only see permissions assigned to that organization. Users no longer with the organization should be archived to restrict access. Select “Save User” when complete.

Viewer – can see applications

Editor – can create and edit applications

Submitter – can view, create, edit and submit final application.

## 2. District Administrator



The District Administrator role can edit/add a new organization and edit/add new users to organizations in the respective district.

Each new organization must be associated with a district.

Reminder: Organization Administration allows you to manage users in your organization



# District Admin - Add New Organization

District Administration

Organizations Users

Filter By:

Organization Name

Organization Type

Search

Reset

Add a New Organization

-- filter by org type --

Organization Name	Organization Type	Primary Email
Fredericksburg City	Locality	enelson@fredericksburgva.gov
George Washington Regional Commission	Regional Organization	ware@gwregion.org
Essex County	Locality	rpeck@essex-virginia.org
Potomac and Rappahannock Transportation Commission (P...	Public Transit	bmassie@omniride.com
Colonial Beach Town	Locality	rmurphy@colonialbeachva.net
Northern Neck Planning District Commission	Regional Organization	jdavis@nnpdc17.state.va.us
Spotsylvania County	Locality	dmorgan@spotsylvania.va.us
Virginia Railway Express	Public Transit	choeffner@vre.org
Northern Virginia Transportation Commission	Public Transit	scott@nvtcd.org
Hampton Roads Transportation Planning Organization	Regional Organization	mkimbrel@hrtpo.org

From the District Administration screen, select “Add a New Organization” to create new organization.

# District Admin - Add New Organization

District Administration

Organizations Users

Return to Organizations

Add New Org

Create Organization

Organization Name

Organization Type

Primary Contact Name

Primary Email Address

Primary Phone Number

Secondary Email Address

Secondary Phone Number

Expand all Roles

Collapse all Roles

Select Applicable System Roles

- Administrator
- Central Office Administrator

Select Applicable Program Roles

- + HB2
- + HSIP BikePed
- + HSIP Rail
- + HSIP Safety
- + HSIP SSI
- + Revenue Sharing
- + SMART SCALE
- + TA Set-Aside

District

- Fredericksburg

Fill in the new organization information and select the applicable program roles for the organization. Click “Create Organization.” Roles should be limited to Reviewer, Editor, Submitter. When adding a new organization and POC for that organization must be identified and set up.

# District Admin - Edit Organization

District Administration

Organizations Users

Return to Organizations

Fredericksburg City

Organization Name: Fredericksburg City

Organization Type: Locality

Primary Contact Name: Erik Nelson

Primary Email Address: enelson@fredericksburgva.gov

Primary Phone Number: (540) 372-1179

Secondary Email Address:

Secondary Phone Number:

Archived?  No  Yes

District

Expand all Roles Collapse all Roles

Select Applicable System Roles

- Administrator
- Central Office Administrator

Select Applicable Program Roles

- + HB2
- + HSIP BikePed
- + HSIP Rail
- + HSIP Safety
- + HSIP SSI
- + Revenue Sharing
- + SMART SCALE
- + TA Set-Aside

Save Organization Cancel

To edit an organization, select an organization from the District Administration screen. Select “Edit this Organization.” Make desired edits and click “Save Organization.”

# District Admin - Add New User

District Administration

Organizations

Users

Filter By:

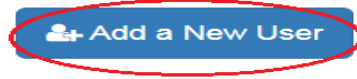
Email / Name

Organization

-- filter by organization --

Search

Reset

 Add a New User

Include Archived Users?

Email Address

Name

Organization

Archived

enelson@fredericksburgva.gov	Erik Nelson	Fredericksburg City	No
ware@gwregion.org	Timothy Ware	George Washington Regional...	No
rpeck@essex-virginia.org	Reese Peck	Essex County	No
bmassie@omniride.com	Betsy Massie	Potomac and Rappahannock...	No
rmurphy@colonialbeachva.net	Robert Murphy	Colonial Beach Town	No
jdavis@nnpdc17.state.va.us	Jerry Davis	Northern Neck Planning Distr...	No
dmorgan@spotsylvania.va.us	Doug Morgan	Spotsylvania County	No
choeffner@vre.org	Christine Hoeffner	Virginia Railway Express	No
scott@nvtdc.org	Scott Kalkwarf	Northern Virginia Transportati...	No
mkimbrel@hrtpo.org	Mike Kimbrel	Hampton Roads Transportati...	No

From the District Administration screen, select “Add a New User.”

# District Admin - Add New User

District Administration

Organizations

Users

[Return to Users](#)

Add New User

[Create User](#)

First Name

Last Name

Email Address

Organization

[Expand all Roles](#)

[Collapse all Roles](#)

Select Applicable System Roles

Select Applicable Program Roles

Fill in the new user information and select applicable program roles for the user. Click “Create User.”

# District Admin - Edit User

District Administration

Organizations

Users

Return to Users

enelson@fredericksburgva.gov

First Name

Erik

Last Name

Nelson

Email Address

enelson@fredericksburgva.gov

Organization

Fredericksburg City

Archived?



No



Yes

Expand all Roles

Collapse all Roles

Select Applicable System Roles

Administrator

Select Applicable Program Roles

- + HB2
- + HSIP BikePed
- + HSIP Rail
- + HSIP Safety
- + HSIP SSI
- + Revenue Sharing
- + SMART SCALE
- + TA Set-Aside

Save User

Cancel

To edit user, select a user from the District Administration screen. Click "Edit this User." Make desired edits and click "Save User."

Expand all Roles

Collapse all Roles

Select Applicable Program Roles

**+ HB2****- HSIP BikePed** CO Reviewer Editor Submitter Viewer**- District Reviewer** Bristol Culpeper Fredericksburg Hampton Roads Lynchburg NOVA Richmond Salem Staunton

For each user you have the option of assigning a district. The benefit of this approach is that the user will only see project applications for the district in which they are assigned essentially providing a worklist. The downside is they won't see applications outside their district. Users can be assigned multiple districts.

## SMART SCALE Update Policy/Process - Proposed Changes

- **Biennial Schedule**
  - Begin application intake in March
  - June 1 deadline for creation of an application
  - August 1 submission deadline
  - Early Screening and Eligibility Decisions
- **Application Limits**
  - Two-Tiered Population-based approach (4 and 8)
- **Project Readiness**
  - Adding guidance on required level of planning and supporting documentation
  - Demonstrate that a project has public support, requiring resolution of support from governing body



# SMART SCALE Update

## Policy/Process - Proposed Changes



- **Project Eligibility**
  - Adding clarity on what projects are eligible for SMART SCALE when a portion of scope includes maintenance or State of Good Repair project elements
- **Full Funding Policy**
  - Adding clarity on full funding policy
  - Adding guidance on scoring process when project is fully funded
- **Relationship of Major Project Elements**
  - Adding guidance that project elements must be associated (contiguous or same improvement type)
-

# SMART SCALE Update

## Scoring/Technical - Proposed Changes

- **Congestion**
  - Person throughput – scale based on length
- **Safety**
  - Remove crashes resulting from DUI
  - Use blended rate for fatalities and severe injuries
- **Economic Development - ED.1 - Site Development**
  - Zoned properties must get primary access from project
  - Remove 0.5 points for consistent with local and regional plans - project and site must be specifically referenced in local and regional planning documents to get points
  - Project within economically distressed area = 0.5 points
  - Reduce buffer to max of 3 miles
  - Consider the establishment of maximum square footage based on project type and based on current level of development - cannot exceed x% of total current square footage in jurisdiction(s)
  - Distinguish between conceptual and detailed site plans

# SMART SCALE Update

## Scoring/Technical - Proposed Changes

- **Economic Development - ED.2 - Intermodal Access**
  - Scale points by freight tonnage-miles by multiplying the freight tonnage by the length of the improvement
- **Land Use**
  - More specific definitions of mixed-use development
  - New methodology - Accessibility to key non-work destinations such as grocery, healthcare, education, etc.
  - Modifies factor calculation
- **Access to Jobs**
  - Eliminate the 45 and 60 minute cap for auto and transit job access respectively

## Schedule/Next Steps

- **August 1** – SMART Portal Opens
  - Revenue Sharing and Safety Programs
- **August 15** - Begin public comment on proposed changes to SMART SCALE
  - Draft SMART SCALE Technical Guide publicly available
- **August – October** - Fall Transportation Meetings
  - Training and Outreach on proposed changes
  - Receive public comment on proposed changes
- **September 1** – SMART Portal Opens
  - Transportation Alternatives
- **October 20** – End public comment on proposed changes to SMART SCALE
- **October 24** - CTB Meeting
  - Adopt Revised SMART SCALE CTB Policy and Policy/Technical Guides
- **November 1** – SMART Portal closes
  - Revenue Sharing, Safety Programs and Transportation Alternatives application programs

**Questions??**

**Demonstration**