SMART Portal Training

August 2, 2017
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
SMART Portal Enhancements

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
SMART Portal Enhancements

**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.
SMART Portal Enhancements

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
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
Highway Safety and Bike/Ped

- **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
Revenue Sharing

• 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.
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.”

<table>
<thead>
<tr>
<th>Email Address</th>
<th>Name</th>
<th>Archived</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:enelson@fredericksburgva.gov">enelson@fredericksburgva.gov</a></td>
<td>Erik Nelson</td>
<td>No</td>
</tr>
<tr>
<td><a href="mailto:brcameron@fredericksburgva.gov">brcameron@fredericksburgva.gov</a></td>
<td>beverly cameron</td>
<td>No</td>
</tr>
<tr>
<td><a href="mailto:dfawcett@fredericksburgva.gov">dfawcett@fredericksburgva.gov</a></td>
<td>doug fawcett</td>
<td>No</td>
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<tr>
<td><a href="mailto:azizzstewart@outlook.com">azizzstewart@outlook.com</a></td>
<td>UAT VDOT</td>
<td>No</td>
</tr>
</tbody>
</table>
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.
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.
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.
From the District Administration screen, select “Add a New Organization” to create new organization.

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Organization Type</th>
<th>Primary Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fredericksburg City</td>
<td>Locality</td>
<td><a href="mailto:enelson@fredericksburgva.gov">enelson@fredericksburgva.gov</a></td>
</tr>
<tr>
<td>George Washington Regional Commission</td>
<td>Regional Organization</td>
<td><a href="mailto:ware@gwregion.org">ware@gwregion.org</a></td>
</tr>
<tr>
<td>Essex County</td>
<td>Locality</td>
<td><a href="mailto:rpeck@essex-virginia.org">rpeck@essex-virginia.org</a></td>
</tr>
<tr>
<td>Potomac and Rappahannock Transportation Commission</td>
<td>Regional Organization</td>
<td><a href="mailto:bmassie@omniride.com">bmassie@omniride.com</a></td>
</tr>
<tr>
<td>Colonial Beach Town</td>
<td>Locality</td>
<td><a href="mailto:rmurphy@colonialbeachva.net">rmurphy@colonialbeachva.net</a></td>
</tr>
<tr>
<td>Northern Neck Planning District Commission</td>
<td>Regional Organization</td>
<td><a href="mailto:jdavis@nnpdc17.state.va.us">jdavis@nnpdc17.state.va.us</a></td>
</tr>
<tr>
<td>Spotsylvania County</td>
<td>Locality</td>
<td><a href="mailto:dmorgan@spotsylvania.va.us">dmorgan@spotsylvania.va.us</a></td>
</tr>
<tr>
<td>Virginia Railway Express</td>
<td>Public Transit</td>
<td><a href="mailto:choefner@vre.org">choefner@vre.org</a></td>
</tr>
<tr>
<td>Northern Virginia Transportation Commission</td>
<td>Public Transit</td>
<td><a href="mailto:scott@nvttc.org">scott@nvttc.org</a></td>
</tr>
<tr>
<td>Hampton Roads Transportation Planning Organization</td>
<td>Regional Organization</td>
<td><a href="mailto:mkimbrel@hripc.org">mkimbrel@hripc.org</a></td>
</tr>
</tbody>
</table>
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.
To edit an organization, select an organization from the District Administration screen. Select “Edit this Organization.” Make desired edits and click “Save Organization.”
From the District Administration screen, select “Add a New User.”
Fill in the new user information and select applicable program roles for the user. Click “Create User.”
To edit a user, select a user from the District Administration screen. Click “Edit this User.” Make desired edits and click “Save User.”
Managing District Users

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)
• **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