SMART Portal User Guide

Version 2.0

July 30, 2020

SMART Portal Overview

The SMART Portal application tool provides public access to applications that have been submitted for various funding programs available through the Virginia Department of Transportation (VDOT) and Department of Rail and Public Transportation (DRPT). These programs include SMART SCALE, Transportation Alternatives Set-Aside (TA), Revenue Sharing (RS), Highway Safety (HSIP), Bike/Ped Safety (BSPS), Systemic Safety Improvements (SSI), Rail Safety Improvements, and State of Good Repair (SGR) Bridges and Paving. To find out more information about each program, please visit the About page on the SMART Portal website available below:

SMART Portal - About

After each round of application submission and scoring, the tool provides public view of the individual project applications and the resulting score for each project and program. Each application program includes a drill down into the cohort list of applications with multiple filter options, including identification of projects selected for funding in the Six-Year Improvement Program (SYIP).

DISCLAIMER

This user guide provides applicants, as well as VDOT, DRPT, and Office of Intermodal Planning and Investment (OIPI) staff, a useful reference on how to navigate and use the functionality SMART Portal provides. The guide is available as a *working* version posted online for applicant and staff use. As updates to the features and functionality within SMART Portal are implemented, this guide will be updated to reflect such changes. Version 1.0 focuses on the Pre-Application function within the SMART SCALE module, however additional content will be added pertaining to the Full Application, as well as other funding programs, prior to the timelines associated with ongoing or future application cycles.

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Contents

Access

Sign-In

Login

Users can sign-in to SMART Portal from the home page by selecting Applicant Sign-In from the banner. A drop down will appear that allows the user to input Username and Password.

Forgot Password

Users can reset their password by selecting the Forgot Password function. The user then enters their account email address and a link to reset the password will be sent to the identified email address.

Navigation and Development

Welcome to SMART Portal

Home

Takes users to the sign-in landing page. An icon will be displayed for each program that the user has permissions to access. Click the Applications or Projects (NVAP-Only) option below a given icon to go to the applications for that program. Click the 'About' option to go to the About Page for each program.

New Application

Allows users to create a new application for a selected funding program.
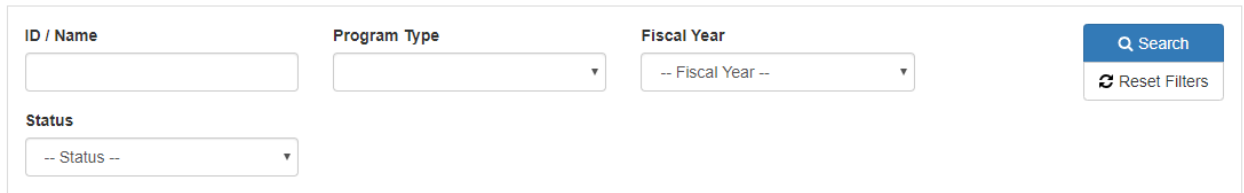
The New Application option on the banner directs users to select which funding program they want to submit an application to. The drop down menu will only have the option to create an application for funding programs that are currently accepting applications.

There are two ways to create an application:
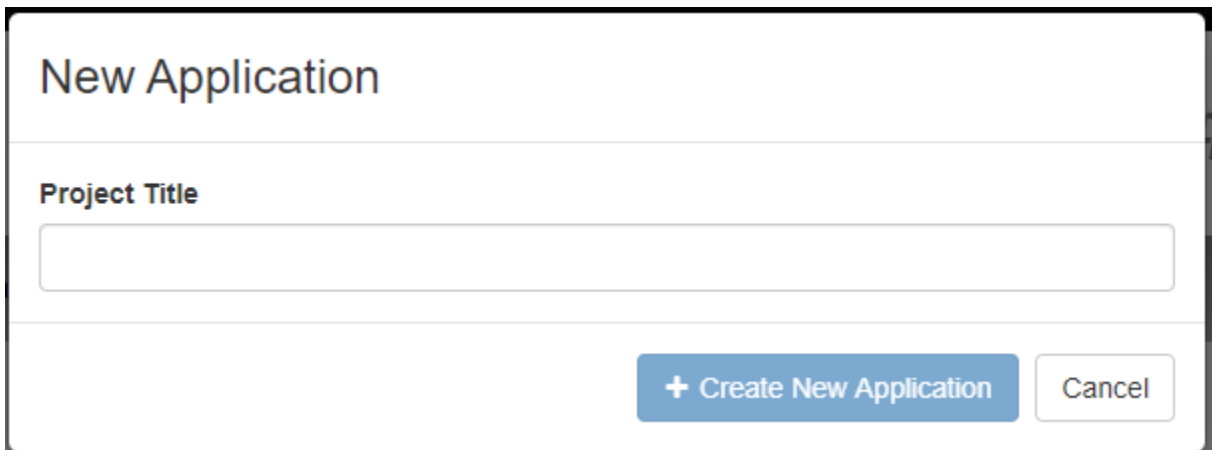
- **Use Previous Application** - allows users to select a previously submitted application and clone information into the new application.
- **Create New Application** - allows users to enter new information on a blank application.

To Use Previous Application, click the option and the user will be directed to a list of previous applications that can be selected for cloning. There are filters to search for applications: Name, Program Type, Fiscal Year, and Status. Using these filters will manipulate list results. When a previous application is identified the user can select to view an application before cloning by clicking the View option. After identifying the application to be cloned, users select the Start option to clone information and begin the pre application.

To Create New Application, click the option and the user will be prompted to enter a project title. Enter the project title and select Create New Application to begin the pre application. Select Cancel to return to the New Application screen.

Dashboard

Takes users to the SMART Portal dashboard.

The programs that the user has permissions to access are listed on the left side of the screen. Click on a given program to view applications.

There are filters to help navigate the list of applications. The filters will vary depending on user roles.

- **Name or ID** - search applications based on name or display id
- **Fiscal Year** - search applications based on fiscal year
- **Status** - search applications based on application status
- **Application Type** - search applications by pre application or full application
- **Funded** - Filter for funded projects

Click Search to apply criteria. Click Reset Filters to clear search criteria.

To Hide the filters, select the Hide Filters option in the upper right of the dashboard.

When the **All** tab is selected, the dashboard will give the option to view projects in a list format or on the map. Click on List or Map to view.

List	Map

In the List view, users can select the project from a list. The list can be filtered using the application ID/Name, Fiscal Year, or Status. Projects in the list can be sorted in ascending or descending order by clicking on a column header. An arrow will be shown next to the column header to indicate sorting.

ID	Name ↑	Status	Program	FY	Last Updated

The Comment Count in the list identifies applications that have comments needing review. The hamburger ≡ in the list provides the option to save the application as pdf.

In the Map **view**, project applications are represented by the pin on the map. Click the pin to view application information. To go to the application, click Go to SMART SCALE Application. To zoom to the project location on the map, click Zoom to.

SMART SCALE 2022

Application Id: 6807-Pre
Name: Validation _as
Fiscal Year: 2022
Funded: No
District: Hampton Roads
Total Cost: $ 0.00
Program Requests: $ 0.00

Go to SMART SCALE Application

Zoom to

Users can click on the map and drag to move the map. Users can zoom in/out on the map using the zoom

+
−
.
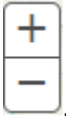
There are icons located in the upper right of the map that provide users with map options. The options are as follows:

Icon	Description
⤢	Expand map
🗺	Select a different base map
🔍	Search address or location
🏠	Zoom to project area
G	Link to Google maps.
b	Link to Bing maps.

Project Updates (NVAP-Only)
With the assigned permissions, Project Updates takes users to the non-VDOT administered projects. See NVAP user guide for more on Project Updates.

Home	New Application	Dashboard	Project Updates	About	💬 ⚠ 🤝 User Name ▾

About
Takes users to the About Page for SMART Portal and for each program in the Portal. The About pages provide a program summary and contact information for the program.

Home	New Application	Dashboard	Project Updates	About	💬 ⚠ 🤝 User Name ▾

Comments, alerts, and concurrence alert notification

Directs users to projects with comments and alerts that are available for review .

User Options

A drop-down menu that allows users to view their account info and administrative options associated with their given role. Click the user's name in the banner to select from user options.

New Application
My Applications

My Account
Organization Administration
District Administration
Tools

Contact Us
Log Out
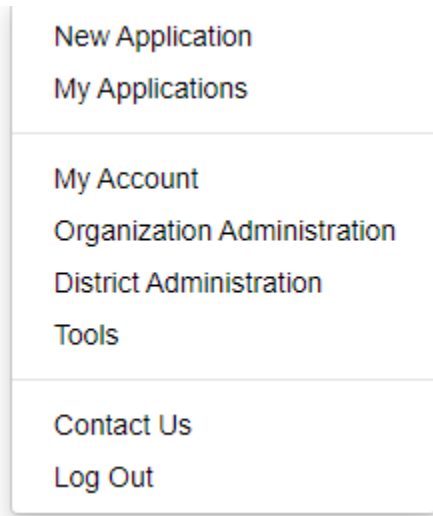
- **New Application** - allows the user to apply for funding for programs that are open for application intake.
- **My Applications** - takes users to the Dashboard where applicants can view applications associated with their organization.
- **My Account** - takes users to an overview of the information associated with their account. This includes contact information and SMART Portal roles assigned to the user. The Change My Password function allows users to modify their password.
- **Organization Administration** - is for users who have the Organization Administrator role. This option allows users to access Organization Administration.
- **District Administration** - is for users with the District Administrator role. This option allows users to access District Administration.
- **Contact Us** - takes users to the portal About page where contacts are listed for each funding program
- **Log out** - allows users to exit SMART Portal

Site Management

Organization Administration

Overview

The Organization Administrator role allows the user to manage roles for the organization he/she is assigned. To access Organization Administration, click on the user options in the banner and select Organization Administration.
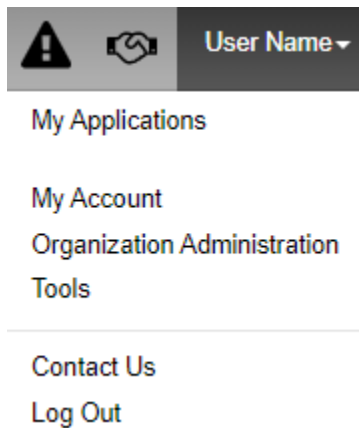
Organization Administration is set up with two tabs: Users and My Organization.

Users tab

The Organization Administrator can manage roles for users within their organization by selecting the user from a list. There are two filters to sort the list of users.

- **Email/Name** - search by user email or name. Partial word search is accepted.
- **Include Archived Users?** - displays archived users with the search results.

Click the Search button to execute filtering criteria. Click reset to clear filtering criteria.

There is a record count that identifies the number of records resulting from a search. In the search results, the user can sort on any column from ascending to descending order, or vice versa, by clicking the column header. An arrow will appear next to the column header to indicate how the list is sorted.

Email Address	Name	Archived

To add a new user, click Add a New User **&+ Add a New User** .

My Organization tab
The Organization Administrator can view all information related to their organization.

District Administration

Overview
The District Administrator role allows users to manage the user roles and organizations within their district. To access District Administration, click on the user options in the banner and select District Administration.

District Administration is set up with three tabs: Users, Roles, and Organizations.

Users tab
The District Administrator can manage roles for users within their district by selecting the user from a list. There are three filters to sort the list of users.

- **Email/Name** - search by user email or name. Partial word search is accepted.
- **Organization** - select an organization from the drop-down menu to filter.
- **Include Archived Users?** - displays archived users with the search results.

Click the Search button to execute filtering criteria. Click reset to clear filtering criteria.

Filter By:

Email / Name	Organization	
	-- filter by organization -- ▼	🔍 Search ↻ Reset

☐ Include Archived Users?

There is a record count that identifies the number of records resulting from a search. In the search results, the user can sort on any column from ascending to descending order, or vice versa, by clicking the column header. An arrow will appear next to the column header to indicate how the list is sorted.

Record Count: 79

Email Address	Name	Organization ↑	Archived

To add a new user, click Add New User   **👤+ Add a New User** .

Roles tab
The District Administrator can manage user permissions in bulk.

Organization tab
The District Administrator can manage organizations within the district by selecting the organization from a list. There are two filters to search the list of organizations.

- **Organization Name** - search by organization name. Partial word search is accepted.
- **Organization Type** - select an organization type from the drop-down menu to filter.

Click the Search button to execute filtering criteria. Click reset to clear filtering criteria.

Filter By:

Organization Name	Organization Type	
	-- filter by org type -- ▼	🔍 Search ↻ Reset

There is a record count that identifies the number of records resulting from a search. In the search results, the user can sort on any column in ascending to descending order, or vice versa, by clicking the column header. An arrow will appear next to the column header to indicate how the list is sorted.
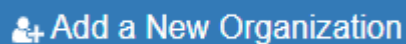
Record Count: 308

Organization Name ↑	Organization Type	Primary Email

To add a new organization, click Add New Organization   **👤+ Add a New Organization** .

Add a New User

Select Organization Administration or District Administration from the user options. From the Users tab, click Add a New User . The Administrator will be prompted to enter the first name, last name, email address, and organization of the new user.

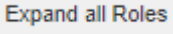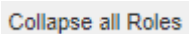When the organization is selected from the drop-down menu, the applicable roles will populate. Click the plus ✚ next to a given program to view the selectable roles. Click the checkbox next to the role to assign it. To view all roles for all programs, click Expand all Roles Expand all Roles . To hide all roles, click Collapse all Roles Collapse all Roles .

Organization

Suffolk City ▼

Expand all Roles   Collapse all Roles

Select Applicable System Roles
☐ NVAP Form Submitter
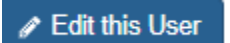☐ Organization Administrator

Select Applicable District Roles

Select Applicable Program Roles
✚ HB2
✚ HSIP BikePed
✚ HSIP Rail
✚ HSIP Safety
✚ HSIP SSI
✚ Revenue Sharing
— SMART SCALE
　☐ Editor
　☑ Submitter
　☐ Viewer
✚ State of Good Repair Bridge
✚ State of Good Repair Pavement
✚ TA Set-Aside

Click Create User ✚ Create User to save and complete. The new user will receive an email to verify their account and setup a password. To exit without saving, click Return to Users ⟲ Return to Users .

Edit or Archive User

Select Organization Administration or District Administration from the user options. From the Users tab, click on the user record that requires editing. All of the user's information will be displayed. Click Edit this User ✏ Edit this User .

The Administrator can edit first name, last name, and email address by typing in the text box.

Edit the organization by selecting from the drop-down menu. To edit a user role click the plus ✚ next to a given program. Click the checkbox next to the role to assign it. To view all roles for all programs, click Expand all Roles Expand all Roles . To hide all roles, click Collapse all Roles Collapse all Roles .

To archive the user select Yes for Archived?

Click Save User ✔ Save User to commit changes. To exit without saving, click Cancel ✖ Cancel or Return to Users ↻ Return to Users .

Add a New Organization

Select District Administration from the user options. From the Organizations tab, click Add a New Organization 👤➕ Add a New Organization . The District Administrator will be prompted to enter required information.

Add New Org

Create Organization

Organzation Name

Organization Type ▾

Primary Contact Name

Primary Email Address

Primary Phone Number (__) ___-____

FIPS Code

Secondary Email Address

Secondary Phone Number (__) ___-____

Click the plus ✚ next to a given program to view the roles that can be assigned to that program. Click the checkbox next to the role to assign it. To view all roles for all programs, click Expand all Roles Expand all Roles . To hide all roles, click Collapse all Roles Collapse all Roles .

Expand all Roles   Collapse all Roles

Select Applicable System Roles

☐ CO NVAP Administrator
☐ District NVAP Coordinator
☐ NVAP Form Submitter
☐ Organization Administrator

Select Applicable District Roles

Select Applicable Program Roles

✚ HB2
✚ HSIP BikePed
✚ HSIP Rail
✚ HSIP Safety
✚ HSIP SSI
✚ Revenue Sharing
✚ SMART SCALE
✚ State of Good Repair Bridge
✚ State of Good Repair Pavement
✚ TA Set-Aside

Click the checkbox for Add an Org Admin? to enter the required Org Admin information.

☑ Add an Org Admin?

First Name
User

Last Name
Name

Email Address
abc@test.com

Click Create Organization ＆ Create Organization to save and complete. To exit without saving, click Return to Users ↻ Return to Users .

Edit or Archive Organization

Select District Administration from the user options. From the organization tab, click on the organization that requires editing. All of the organization's information will be displayed. Click Edit this Organization ✎ Edit this Organization .

The District Administrator can edit the applicable fields.

To archive the user select Yes for Archived?

To edit a role assigned to the organization click the plus ✚ next to a given program. Click the checkbox next to the role to assign it. To view all roles for all programs, click Expand all Roles Expand all Roles . To hide all roles, click Collapse all Roles Collapse all Roles .

Note that pre application and full application cap limits are listed, but cannot be edited.

Form Caps
SMART SCALE 2022 Pre-Screen Requests - 5
SMART SCALE 2022 Submission - 4

Click Save Organization ✔ Save Organization to commit changes. To exit without saving, click Cancel ✖ Cancel or Return to Organizations ⟲ Return to Organizations .
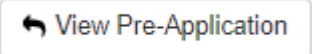
SMART SCALE

SMART SCALE Pre Application - Overview

Application Views

There are two options to view the pre application – view mode and edit mode.

- **View** - The user will see the pre application as it will appear for submission, but will not be able to make edits to the content. From View, the user can select to return to Edit, print the pre application, or save it as a pdf.

- **Edit** - the user can make changes to the content of the pre application. To switch views, the user can select View the pre application

Info Tips and Prompts - Editing

In edit view, there is a blue info tip that appears next to certain fields on the pre application. Hover over the info tip for information about the field .

Based on responses to certain questions the pre application, the project may be at risk for screening out or require more information to be submitted. The user will be prompted by a warning message that the application is at risk. The user will be promoted when additional information is required.

> ⚠ Your proposed project is at risk for screening out. Please contact your SMART SCALE representative for more information. A list of contacts can be found at - https://smartportal.virginiahb2.org/#/about/smart-scale.
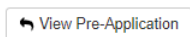
Pre Application Header - Editing

In edit view, the application header will appear as follows.

In the upper left, the pre application identifies that the user is editing the SMART SCALE pre application. It provides the title of the application and the option to switch from Edit to View Pre Application.

In the upper right, the pre application identifies the status, the submitting organization, the project ID number, who created the application and when, and who last updated the application and when.

There are six pearls that represent each section of the pre application. The user can click on a given pearl to navigate to that section of the pre application. The pearls/sections are named as follows:

1. General

2. Project Eligibility
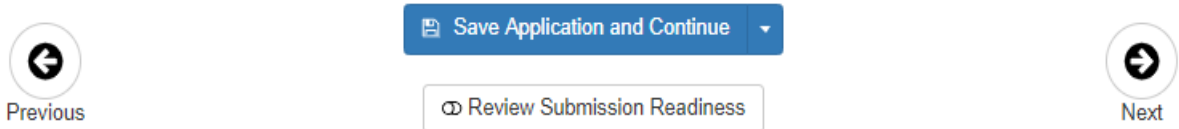3. Project Readiness
4. Delivery/Funding
5. Location
6. Supporting Documents

Pre Application Saving and Navigation - Editing

At the bottom of each section of the pre application there are save and navigation options.

- Save Application and Continue - by clicking the arrow on the right of the Save Application and Continue button, applicants have the option of saving the application and continuing to Edit, or save the application and go to View.
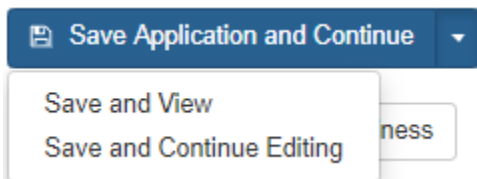
- Previous/Next - takes the user to previous or next section of the pre application

Pre Application Submission - Editing

Review Submission Readiness - when the user is ready to submit the pre application, clicking the Review Submission Readiness option will prompt the user to correct any errors or issues preventing submission.

The pearls at the top of the pre application will highlight the section and number of errors that need to be addressed before the pre application can be submitted. Click the pearl to navigate to a given section and address the error.

When all errors have been addressed, the user will click the checkbox indicating all pre application information is correct and ready for submission. Click Submit application to complete submission.

SMART SCALE Pre Application - Pearls

General

Users enter point of contact information and general project information.

Point of Contact Information

Project Point of Contact Name ⓘ

Project Point of Contact Email ⓘ

Project Point of Contact Phone ⓘ

(___) ___-____

Project Information

Project Title ⓘ

Title of the Project

Principal Improvement ⓘ

-- Select Principal Improvement Type -- ▾

Project Short Description ⓘ

(500 character maximum)

Does this project include any improvements to non-VDOT maintained roadways?

○ No
○ Yes

Application Program Requested ⓘ

VDOT District ⓘ

-- Select VDOT District -- ▾

NOTE: Content in Project Short Description will be locked after pre application submittal and close of pre application window. Project Short Description can only be revised after these instances based on coordination with VDOT, DRPT, and/or OIPI staff.

Project Eligibility

Users enter information for project eligibility by answering the provided questions. Based on the response to certain questions, the form will expand to request more information when required.

Project Eligibility

Is the project a study?

○ Yes
○ No

Is the project a capacity enhancement, operational improvement, ITS or technology improvement, or safety project?

○ Yes   ○ No

Does the project include major features that are either contiguous, proximate, or of the same improvement type? For the purpose of this question and the CTB policy contiguous means adjacent or together in a sequence. Transit stops or stations along a transit route or intersections or spot improvements along a corridor meet the definition of contiguous for the purposes of the project eligibility policy.

○ Yes
○ No

Is project currently fully funded and included in a Capital Improvement Program, MPO Transportation Improvement Program (TIP), or the VDOT, DRPT, or NVTA Six-Year Improvement Program(s)?

○ Yes
○ No

Does the project include a commitment by a developer through a local zoning approval process (proffered condition)?

○ Yes
○ No

Is any part of your project within an established MPO study area?

○ Yes
○ No

Project features are identified in the project eligibility section. Each feature expands by clicking the ➕ .
Click the checkbox next to a given feature to select it.

Is the project a capacity enhancement, operational improvement, ITS or technology improvement, or safety project?
⦿ Yes   ○ No

Please check all that apply (bulleted list of checkboxes below):

➕ Highway Improvements ⓘ
➕ Bicycle and Pedestrian Improvements ⓘ
➕ Bus Transit Improvements ⓘ
➕ Rail Transit Improvements (Streetcar, Light Rail, Heavy Rail, Commuter Rail) ⓘ
➕ Intercity Passenger Rail ⓘ
➕ Freight Rail ⓘ
➕ Travel Demand Management (TDM) Improvement(s) ⓘ
➕ Right-of-Way and Utilities ⓘ

Project Readiness

Project readiness populates based on the information the user provided about project features. The readiness categories will expand to request more information when required.

Project Readiness

Based on the project features selected in the Project Eligibility section, please respond to any selected readiness question below. If no categories are selected, please proceed to the next section of the application

☐ Bus Transit, Rail Transit, Passenger Rail, or Freight Rail

☐ New grade-separated interchange on an existing limited access facility

☐ Grade separation of at-grade intersection on a non-limited access roadway

☐ Modifications to an existing grade-separated interchange

☐ New Traffic Signal

☐ New Location Facilities

☐ Widening Project

Delivery/Funding

Consists of project delivery information, phase estimate, and schedule. The user selects the Project Delivery Information.

For Project Planning Status please click all the plans/studies that support the proposed project.

Project Delivery Information

Project Planning Status ❶

- ☐ Constrained Long Range Plan (MPO)
- ☐ Preferred Alternative (NEPA or Planning Level)
- ☐ Vision Long Range Plan (MPO)
- ☐ Rural Long Range Plans
- ☐ Other Regional Plan
- ☐ Transportation Element of Local Comprehensive Plan
- ☐ Planning/Safety Study
- ☐ State Transportation Plan
- ☐ Transit Development Plan (TDP)
- ☐ NEPA Study

The user inputs phase estimate and schedule information.

Phase Estimate and Schedule

Please provide project phase schedule and cost estimate information. ❶

+Add Project Phase

Phase Milestone	Status ❶
PE (Survey, Environmental, Design)	-- Choose Option -- ▾
RW (Right of Way and Easement Acquisition, Utility Relocation)	-- Choose Option -- ▾
CN (Construction, Oversight, Contingencies)	-- Choose Option -- ▾

Total Cost Estimate ❶
$0

The user will select a Status for each phase. The information required for that phase depends on the phase status selected The phase status are Not Needed, Not Started, Underway, and Complete.

- **Not Needed** - no information required
- **Not Started** - Enter base cost estimate. Select Risks/Contingency/CEI percentage from drop down. Phase cost estimate will populate.

Phase Milestone
PE (Survey, Environmental, Design)

Status ❶
Not Started ▾

Base Cost Estimate (in 2020 dollars)
$ $10,000

Risks/Contingency/Unknowns ❶
5% ▾

Phase Estimate + Contingency
$10,500

- **Underway and Complete** - Enter base cost estimate. Select Risks/contingency/CEI percentage from drop down. Select Start Date and End Date. Phase cost estimate will populate.

Phase Milestone		Status ⓘ	
PE (Survey, Environmental, Design)		Underway ▼	

Base Cost Estimate (in 2020 dollars)	Risks/Contingency/Unknowns ⓘ	Start Date ⓘ	End Date ⓘ
$ $10,000	5% ▼	📅	📅

Phase Estimate + Contingency
$10,500

Phase Milestone		Status ⓘ	
PE (Survey, Environmental, Design)		Complete ▼	

Base Cost Estimate (in 2020 dollars)	Risks/Contingency/Unknowns ⓘ	Start Date ⓘ	End Date ⓘ
$ $10,000	5% ▼	📅	📅

Phase Estimate + Contingency
$10,500

NOTE: All phase and project estimates should be based on Current year (2020) costs. The percentage (%) dropdown for "Risks/Contingency/Unknowns" should be a combined value reflective of the assumed phase level Construction risk, expected Contingency, expected Construction Engineering and Inspection, and/or unknown costs as a percentage (%) of the Construction phase base cost estimate. For the full application, the system will require this percentage (%) to broken out between Risk/Contingency and expected Construction Engineering and Inspection percentage (%) costs. All phase estimate costs will be automatically inflated from current year costs based on pre-determined factors and the inputted project schedule.

Click the calendar prompt 📅 to select the Start Date and End Date or enter it manually in YYYY-MM-DD format. In the calendar prompt, click the arrows to the left and right of the Month YYYY to scroll month by month.

Start Date ⓘ

		March 2020				>
Sun	Mon	Tue	Wed	Thu	Fri	Sat
10	01	02	03	04	05	06	07
11	08	09	10	11	12	13	14
12	15	16	17	18	19	20	21
13	22	23	24	25	26	27	28
14	29	30	31	01	02	03	04
15	05	06	07	08	09	10	11

Today   Clear   Done

End Date ⓘ

		March 2021				>
Sun	Mon	Tue	Wed	Thu	Fri	Sat
9	28	01	02	03	04	05	06
10	07	08	09	10	11	12	13
11	14	15	16	17	18	19	20
12	21	22	23	24	25	26	27
13	28	29	30	31	01	02	03
14	04	05	06	07	08	09	10

Today   Clear   Done

Click the Month YYYY to view all months.

Start Date ⓘ

Click the arrows to the left and right of the YYYY to scroll year by year. Click YYYY to select the year from a list organized in 20 year intervals.

Start Date ⓘ

Click the arrows to the left and right of the YYYY-YYYY interval to scroll in 20 year intervals.

Click [Today] to default to today's date. Click [Clear] to clear the date. Click [Done] to close the calendar prompt.

Add Project Phase - for projects with an additional phase, users can click the Add Project Phase in the upper right of the Phase Estimate and Schedule section and input additional data.

+Add Project Phase

When all cost information has been entered, the total cost estimate will populate

Total Cost Estimate ❶

$535,500

.

Location

Users draw a polygon on the map to represent the project area and identify associated VTRANS need location and justification.

Map Navigation

Users can click on the map and drag to move the map. Users can zoom in/out on the map using the zoom

+

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There are icons located in the upper right of the map that provide users with map options. The options are as follows:

Icon	Description
⤢	Expand map
📖	Select a different base map
🔍	Search address or location
⌂	Zoom to project area
G	Link to Google maps.
b	Link to Bing maps.

VTRANS Needs Category Selection

To select a VTRANS need, select the check box next to the given category.

VTRANS Needs Categories Requested: ⓘ

☐ Corridor of Statewide Significance
☐ Regional Network
☐ Urban Development Area
☐ Safety (non-CoSS)

As the user selects VTRANS needs categories, there will be a corresponding pearl populated beneath the map.

VTRANS Needs Categories Requested: ⓘ

☑ Corridor of Statewide Significance
☑ Regional Network
☐ Urban Development Area
☐ Safety (non-CoSS)

Use the mapping tool below to locate your project area(s).

Project Areas

Once the VTRANS needs categories are selected, users will draw a polygon on the map to represent the project area. Follow the prompt in the upper left of the map to complete the polygon.

After completing the polygon the user will have Project Areas options in the upper left of the map. To edit, remove, or zoom to the polygon, click the respective icon. To draw additional polygons, click Add Area.

The Areas Served information below the map will populate based on where the polygon is drawn.

Click Next Step in the Project Areas option to move onto VTRANS need justification information. The map will populate data for the first VTRANS need category that the user selected.

VTRANS Need

The map will display a table of VTRANS need locations along with the corresponding segments and points on the map. To collapse/expand the table to view more of the map, click the arrow to the right of the table .

The user will need to select the segment(s) or point(s) that are relevant to the project, by using the table or the map, and provide justification.

Select VTRANS need from the table - Users can click the checkbox in the first column of the table or click the Edit Need icon ☑ in the far right column to select a need. To zoom to the need location on the map, click the zoom icon ◎ .
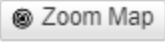
Corridors of Statewide Significance

Select the affected corridors by checking the boxes in the list below or clicking on the shapes on the map.

	Need Id	Need Location	Need Categories	Distance to Project		
✔	400956	Roadway Intersection: Military Hwy S PR/NP (Chesapeake City), Military Hwy W NP (Chesapeake City), VA-191N, US-13N/S, US-460E/W	Safety Improvement CoSS	0.00	◎	☑
☐	404129	Roadway Intersection: Ramp from Military Hwy S PR (Chesapeake City), US-13S, US-460W; Military Hwy S NP (Chesapeake City), US-13N, US-460E	Safety Improvement CoSS	0.00	◎	☑
☐	102308	I-64W	Congestion, Limited Access TDM (New or expanded park and ride facilities, rail and public transportation services and	0.00	◎	☑

Finished selecting Corridors?

Next Step ➔

After selecting the VTRANS need location, the user will be prompted to enter justification for the selected location. When justification is complete, the user can click Return to List [Return To List] to go back to the VTRANS needs table and select the next location. The navigation buttons [Previous] [Next] scroll through the VTRANS needs locations from the justification view. Click Include/Exclude [Include] [Exclude] to include or remove a needs location selection.

Corridors of Statewide Significance

[Return To List]   [Zoom Map]

Need Id:
400956

Need Location:
Roadway Intersection: Military Hwy S PR/NP (Chesapeake City), Military Hwy W NP (Chesapeake City), VA-191N, US-13N/S, US-460E/W

Distance To Project:
0.00 miles

Need Categories:
Safety Improvement CoSS

Justification:

APPLICANT PROVIDES JUSTIFICATION HERE

[Previous]   [Exclude]   [Next]

When the user is done entering all needs location justifications for the given VTRANS category, click Return to List [Return To List] and then Next Step [Next Step]. The table and map will populate with data for the next selected VTRANS need category and the corresponding needs locations.

Select VTRANS need from the map - Users can click on a VTRANS need location segment or point on the map. A pop-out will display information related to the location.

Corridors of Statewide Significance - ☐ ✕
Point

Need Id: 400956
Need Location: Roadway Intersection:
Military Hwy S PR/NP (Chesapeake City),
Military Hwy W NP (Chesapeake City),
VA-191N, US-13N/S, US-460E/W
Need Categories: Safety Improvement
CoSS

Edit Need

Zoom to

To enter a justification, click Edit Need [**Edit Need**]. The needs location selected will show up in the table and the user can enter justification.

When the user is done entering all VTRANS need location justifications for the given VTRANS category, click Return to List [↻ **Return To List**] and then Next Step [**Next Step** ↻]. The table and map will populate with data for the next selected VTRANS need category and the corresponding needs locations.

When all VTRANS need category locations and justifications have been entered, a summary of the Project Area will be displayed on the map.

A written summary of the VTRANS need location and justification is displayed below the map.

Need Justifications

Corridors of Statewide Significance

Need Id	Need Location	Need Categories	Justification
400956	Roadway Intersection: Military Hwy S PR/NP (Chesapeake City), Military Hwy W NP (Chesapeake City), VA-191N, US-13N/S, US-460E/W	Safety Improvement CoSS	COSS APPLICANT JUSTIFICATION HERE

Regional Network

Need Id	Need Location	Need Categories	Justification
108642	I-264W Ramp 1A	Limited Access TDM (New or expanded park and ride facilities, rail and public transportation services and facilities, and commuter assistance programs)	RN APPLICANT JUSTIFICATION HERE
108077	I-264W Ramp 1A	Limited Access TDM (New or expanded park and ride facilities, rail and public transportation services and facilities, and commuter assistance programs)	RN APPLICANT JUSTIFICATION HERE
110934	I-664E Ramp 15A	Limited Access TDM (New or expanded park and ride facilities, rail and public transportation services and facilities, and commuter assistance programs)	RN APPLICANT JUSTIFICATION HERE

Supporting Documents

Based on applicant responses throughout the application, supporting documents will be required to be attached and submitted with the application. Users will be prompted with a reminder to attach documents when they reach the Supporting Documents pearl.

Remaining Required Document Uploads
Please upload a Project Sketch for your project

To add an attachment, click the button for Add New Attachment **⊞ Add New Attachment** . The user will be prompted to select a file to upload.

After selecting a file to upload, the user will be prompted to enter a Description for the document and the Attachment Type. The Attachment Type will be selected from a drop down menu of possible attachments. After completing the Description and Attachment Type, select the green Upload button to attach the document. Click the red trash can icon to remove the attachment.

Pending Uploads:

Description	Attachment Type	File Name		
Attachment Description	Project Sketch ▾	Attachment document test.docx	Upload ⬆	🗑

Once documents have been uploaded, the user can utilize filters to sort through documents. Users can search by Description/File Name or Attachment Type.

Filter By:

Description/File Name:	Attachment Type:	
Description/File Name...	▾	↻ Reset Filters

The methods available to download the attachments are: Click the File Name hyperlink in the grid. Use the checkbox next to each attachment to select which attachments to download and then click Download Selected Attachments. Select Download All Attachments. To discard an attachment, click the red trash icon.

Current Attachments:

Filter By:

Description/File Name:	Attachment Type:	
Description/File Name...	▾	⟳ Reset Filters

☐	Description	Attachment Type ⓘ	File Name		
☑	Attachment Description	Project Sketch	Attachment document test.docx	ⓘ	🗑

📄 Download Selected Attachments ———————————————— 📄 Download All Attachments

Pre Screening - District Validator

During pre screening, the District Validator can edit the pre application by using the option in the application header.

> ✐ Edit Pre-Application 🖶 Print Version 📄 Save as PDF

At the bottom of the application, there are validation questions. To complete district validator pre screening, the District Validator must confirm the validation questions, provide any additional comments, and submit the answers. The District Validator also has the option to save their work so far and return later.

Validation

Perform **District Validation**

Select the primary VTRANS need:
- Corridor of Statewide Significance
- Regional Network
- Urban Development Area
- Safety (non-CoSS)
- No VTRANS need met

Does the project meet eligibility requirements?
- Yes
- No

Does the project meet readiness requirements?
- Yes
- No

Validation is complete and the information provided in the application is reasonable and accurate?
- Yes
- No

Justification/Comments

[   ]

Save   Submit

Pre Screening - Central Office Validator

During pre screening, the Central Office Validator can edit the pre application by using the option in the application header.

> ✐ Edit Pre-Application 🖶 Print Version 📄 Save as PDF

At the bottom of the application, there are validation questions. To complete central office pre screening, the Central Office Validator must confirm the validation questions, provide any additional comments, and submit the answers. The Central Validator also has the option to save their work so far and return later.

Validation

Perform **Central Office Validation**

Select the primary VTRANS need:
○ Corridor of Statewide Significance
○ Regional Network
○ Urban Development Area
○ Safety (non-CoSS)
○ No VTRANS need met

Does the project meet eligibility requirements?
○ Yes
○ No

Does the project meet readiness requirements?
○ Yes
○ No

Is this application ready to be evaluated?
○ Yes - Screen-In
○ No - Screen-Out

Justification/Comments

[Save] [Submit]

Comments

The applicant can enter a comment using the comments module at the bottom of the Edit or View of the application. Using the drop-down, the applicant can identify which section of the application the comment is relevant to. The comment will be attached to the application for review by the District Validator or Central Office Validator.

💬 Comments

Filter By:

Relevant To:
All Sections

Type Comment

💬 Add Comment

The District Validator or Central Office Validator will receive notification in the banner of the new comment

.

The Validator can use the banner or dashboard to navigate to the application and acknowledge the comment
.

Likewise, the District Validator or Central Office Validator can initiate a comment. The applicant will receive a notification in the banner to indicate a new comment. The user can use the banner or dashboard to navigate to the application and acknowledge the comment.
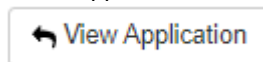
SMART SCALE Full Application – Overview

Application Views

There are two options to view the full application – view mode and edit mode.

- **View** – The user will see the application as it will appear for submission, but will not be able to make edits to the content. From View, the user can select to return to Edit, Print, Save the application as a pdf, View Pre application, or Compare Differences.

- **Edit** – The user can make changes to the content of the full application. To switch views, the user can select View Application.

Application Header – Editing

In edit view, the application header will appear as follows:

In the upper left, the application identifies that the user is editing the SMART SCALE Application. It displays the title of the application and the option to switch from Edit to View Application.

In the upper right, the application identifies the status, the submitting organization, the project ID number, who created the application and when, and who last updated the application and when.

There are eight pearls that represent each section of the application. The user can click on a given pearl to navigate to that section of the application. The pearls/sections are identified as follows:

1. General
2. Location
3. Features
4. Factors
5. Delivery/Funding
6. Economic Development Sites
7. Supporting Documents
8. State's Understanding

Note: Upon entering edit view, the application may indicate that action is needed on the Economic Development Sites and Supporting Documents sections of the application. This will prohibit saving. To alleviate this, the Applicant will need to complete at least one economic development site and upload the supporting the documentation. If the Applicant is not ready to enter this information and wants to save other changes to the application, the Applicant can click on the Economic Development Sites pearl and select Remove Site. Upload a place holder for the supporting document. This will allow the user to save.

Application Saving and Navigation - Editing
At the bottom of each section of the application there are save and navigation options.

- Save Application - Click the arrow on the right of the Save Application and Continue button. Applicants have the option to Save and Continue to Editing or Save and View the application.

- Previous/Next – Navigate to the previous or next section of the application.

Application Submission - Editing
When, the Applicant is ready to submit the application, click the Review Submission Readiness option at the bottom of the application. It will prompt the Applicant to correct any errors or issues preventing submission.
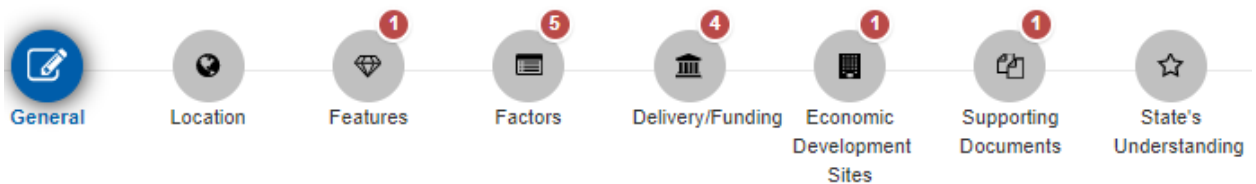
Save Application and Continue

Review Submission Readiness

There are errors on your form that must be corrected before you can submit this application.

There are required attachments remaining on your form that must be uploaded before you can submit this application.

The pearls at the top of the application will highlight the section and number of errors that need to be addressed before the application can be submitted. Click the pearl to navigate to a given section and address the error.

General Location Features Factors Delivery/Funding Economic Development Sites Supporting Documents State's Understanding

When all errors have been addressed, the user will click the checkbox indicating that all application information is correct and ready for submission. Click Submit Application to complete submission.

Please review this application thoroughly and verify all information is correct prior to submitting it to VDOT and DRPT. If all of the information listed above is correct, check this checkbox, then click Submit Application to submit this application to VDOT and DRPT.

✔

Submit Application

SMART SCALE Full Application – Pearls

General

The general information will be populated from the information provided on the pre application. This information can be edited through collaboration with VDOT staff.

Point of Contact Information

Project Point of Contact Name	Project Point of Contact Email	Project Point of Contact Phone
POC	poc@email.com	(555) 555-5555

Project Information

Project Title
A Great Project

Principal Improvement
Highway

Project Short Description
short description here.

Does this project include any improvements to non-VDOT maintained roadways?
No

Application Program Requested ℹ
District Grant
Statewide High Priority

VDOT District
Hampton Roads

Location

The location section will be populated with the polygon representing the project area from the pre application. The summary of the VTRANS need location and justification is also populated below the map.

The user can modify the VTRANS Needs by clicking the box next to the need category. As the user selects the VTRANS needs categories, there will be a corresponding pearl populated beneath the map.

VTRANS Needs Categories Requested: ℹ
- ☑ Corridor of Statewide Significance
- ☑ Regional Network
- ☑ Urban Development Area
- ☑ Safety (non-CoSS)

Use the mapping tool below to locate your project area(s).

Areas Served

Based on project area the geographic information below will populate.

Districts Served	MPOs Served	PDCs Served	Jurisdictions Served
• Hampton Roads	• Hampton Roads Transportation Planning Organization	• Hampton Roads	• Suffolk City

Need Justifications

Corridors of Statewide Significance

Need Id	Need Location	Need Categories	Justification
402333	Roadway Intersection: Bank St PR/NP (Suffolk City), UR-6514E/W (Suffolk City)	Safety Improvement CoSS	coss 1

Regional Network

Need Id	Need Location	Need Categories	Justification
400642	Activity Center (Local-serving): Downtown Suffolk	New or Enhanced Transit Access	rn 1

Urban Development

Need Id	Need Location	Need Categories	Justification
111622	VA-32S: N Main St	Road Capacity, Road Operations, Intersection Design, Street Grid, Safety Features, Traffic Calming, Signage, Transit Frequency, Transit Operations, Transit Capacity, Transit Facilities, Bike Infrastructure, Pedestrian Infrastructure, Complete Streets, Sidewalks, On-street Parking, Off-street Parking, Environment	ud 1

Safety

Need Id	Need Location	Need Categories	Justification
401329	Roadway Intersection: Finney Ave PR/NP (Suffolk City), UR-6508E/W (Suffolk City)	Safety Improvement	safe 1

## Additional Urban Development Area Needs

☐ Recently designated or pending Urban Development Area (UDA) with UDA need(s) not included on the UDA needs/map above. UDA must be consistent with § 15.2-2223.1 of the Code of Virginia.

Additional Safety Needs

☐ Project addresses safety need not identified in VTrans or included in map above (will require upload of safety study as supporting documentation)

The Applicant can click and drag on the map to reposition it. There are icons located on the right of the map that provide users with map options. The options are as follows:

Icon	Description
⤡	Expand map
🗺	Select a different base map
🔍	Search address or location
⌂	Zoom to project area
G	Link to Google maps.
b	Link to Bing maps.

|	
	Zoom in/out
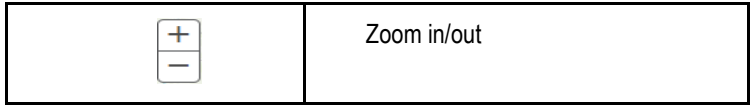
Below the map, there are pearls that represent the various sections needed to complete the map. The sections are as follows:

- Project Areas – Draw or edit project polygon.
- Roads and Highways – Indicate route segments with proposed improvements.
- VTRANS Needs – Mapping and justification of Corridors of Statewide Significance, Regional Network, Urban Development, Safety.
- Summary – Summarize project area, roads and highways segment improvements, VTRANS needs
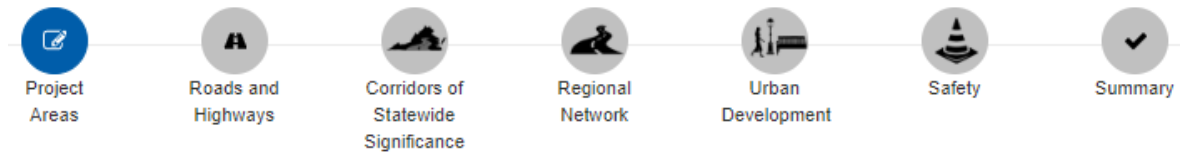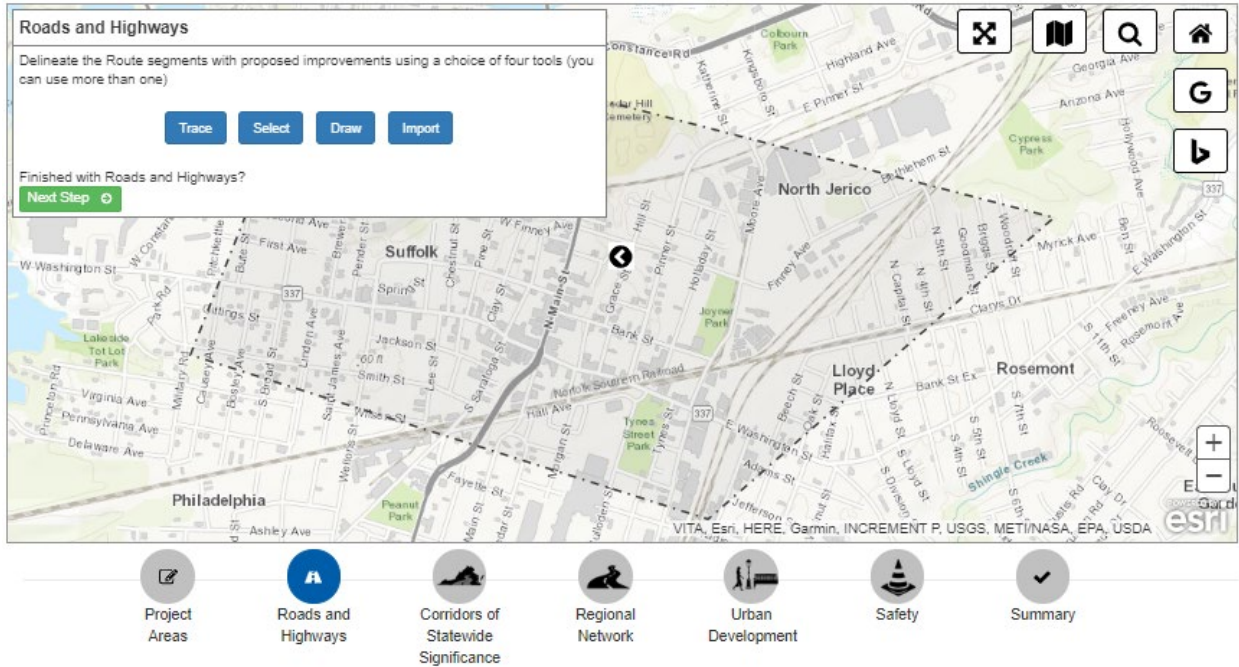

Project Areas

The Applicant has the option modify the project polygon. To edit, remove, or zoom to the existing polygon, click the respective icon. To draw additional polygons, click Add Area and follow the prompt. Click Next Step when complete.
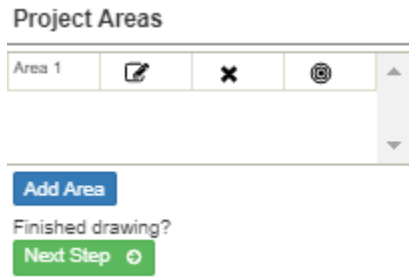
Roads and Highways

The Applicant will be prompted to indicate route segments with proposed improvements.

There are four options for selecting Roads and Highways:

1. Trace – Allows user to trace route segments. Follow the prompt to complete trace.

2. Select – Allows user to select route segments from a list. Follow the prompt to complete selection.

Roads and Highways

Select the affected roads by checking the check boxes in the list below or clicking on the route segments on the map.

	Route Name ▲
☐	1St AVE (PR - City of Suffolk)
☐	2nd AVE (PR - City of Suffolk)
☐	Abraham ST (PR - City of Suffolk)
☐	Adams ST (PR - City of Suffolk)
☐	Azalea CT (PR - City of Suffolk)
☐	Azalea Ct SPUR (PR - City of Suffolk)
☐	BUS US-58E (5 City of Suffolk)
☐	Bank ST (PR - City of Suffolk)
☐	Bank St EXT (PR - City of Suffolk)
☐	Beech ST (PR - City of Suffolk)

🟦 Not Included 🟥 Included In Project

[Finished]

3. Draw – Allows user to draw a segment. Follow the prompt to complete.

Roads and Highways

Start drawing by clicking on the map. Each additional click will add another segment to the line. Double click when you are finished drawing.

Route Name [   ]

[Finished] [Cancel]

4. Import – Allows user to import a shape file. Follow the prompt to complete import.

Roads and Highways

The shapefile must meet the following requirements.

- Contain a spatial reference or be in WKID 3857
- Only contain lines features. Points and polygons will be ignored.
- Be compressed into a single zip file.

[Select Shapefile] [Cancel]

VTRANS Needs

The map will display a table of VTRANS need locations along with the corresponding segments and points on the map. The Applicant will need to select the segment(s) or point(s) that are relevant to the project for each VTRANS Need. To collapse/expand the table to view more of the map, click the arrow to the right of the table ◀ ▶.

Corridors of Statewide Significance

Select the affected corridors by checking the boxes in the list below or clicking on the shapes on the map.

	Need Id	Need Location	Need Categories	Distance to Project			
✓	402333	Roadway Intersection: Bank St PR/NP (Suffolk City), UR-8514E/W (Suffolk City)	Safety Improvement CoSS	0.00	⊗	☑	▲
☐	111629	VA-32N: N Main St	Congestion	0.00	⊗	☑	
☐	403278	Roadway Intersection: Finney Ave PR/NP (Suffolk City), UR-8508E/W (Suffolk City)	Safety Improvement CoSS	0.00	⊗	☑	
☐	403998	Roadway Intersection: Constance Rd W PR/NP (Suffolk City), Bus US-58E/W (5 Suffolk City)	Safety Improvement CoSS	0.00	⊗	☑	
☐	111630	VA-32N: N Main St	Congestion	0.07	⊗	☑	▼

Finished selecting Corridors?

Next Step ⊙

The Applicant can select VTRANS Needs from the table or from the map as follows:

Select VTRANS Need from the table - Click the checkbox in the first column of the table or click the Edit Need icon ☑ in the far right column. The user can also search for a specific need location by using the Find Need ID search box. To zoom to a need location on the map, click the zoom icon ⊛.

Corridors of Statewide Significance

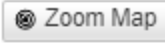Select the affected corridors by checking the boxes in the list below or clicking on the shapes on the map.

Find Need Id [   ]   Q Go

	Need Id	Need Location	Need Categories	Distance to Project			
✓	402333	Roadway Intersection: Bank St PR/NP (Suffolk City), UR-8514E/W (Suffolk City)	Safety Improvement CoSS	0.00	⊗	☑	▲
☐	111629	VA-32N: N Main St	Congestion	0.00	⊗	☑	
☐	403278	Roadway Intersection: Finney Ave PR/NP (Suffolk City), UR-8508E/W (Suffolk City)	Safety Improvement CoSS	0.00	⊗	☑	
☐	403998	Roadway Intersection: Constance Rd W PR/NP (Suffolk City), Bus US-58E/W (5 Suffolk City)	Safety Improvement CoSS	0.00	⊗	☑	
☐	111630	VA-32N: N Main St	Congestion	0.07	⊗	☑	▼

Finished selecting Corridors?

Next Step ⊙

After selecting the VTRANS need location, the user will be prompted to enter justification for the selected location. When justification is complete, the user can click Return to List [Return To List] to go back to the VTRANS needs table and select the next location. The navigation buttons [Previous] [Next] scroll through the VTRANS needs locations from the justification view. Click Include/Exclude [Include] [Exclude] to include or remove a needs location selection.

Corridors of Statewide Significance

[Return To List]   [Zoom Map]

Need Id:
400956

Need Location:
Roadway Intersection: Military Hwy S PR/NP (Chesapeake City), Military Hwy W NP (Chesapeake City), VA-191N, US-13N/S, US-460E/W
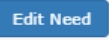
Distance To Project:
0.00 miles

Need Categories:
Safety Improvement CoSS

Justification:

APPLICANT PROVIDES JUSTIFICATION HERE

[Previous]   [Exclude]   [Next]

When the user is done entering all needs location justifications for the given VTRANS category, click Return to List [Return To List] and then Next Step [Next Step]. The table and map will populate with data for the next selected VTRANS need category and the corresponding needs locations.

Select VTRANS need from the map – Click on the segment or point on the map. A pop-out will display information related to the location. To enter a justification, click Edit Need [Edit Need]. The location selected will display in the table and the user can enter justification.
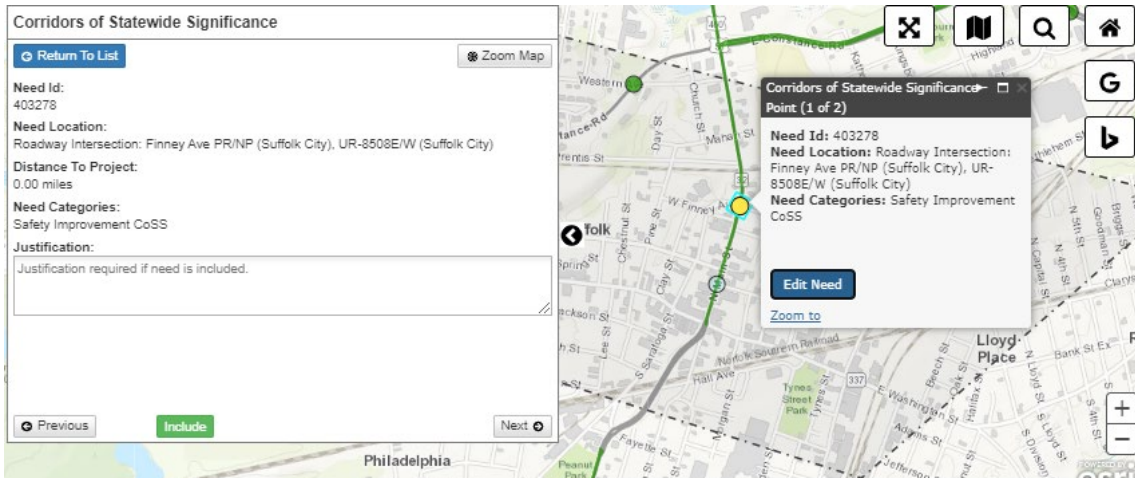
When the user is done entering all VTRANS need location justifications for the given VTRANS category, click
Return to List [Return To List] and then Next Step [Next Step]. The table and map will populate with
data for the next selected VTRANS need category and the corresponding needs locations.

Summary

When all VTRANS need locations and justifications have been entered, a summary of the Project Areas, Roads
and Highways, and VTRANS Needs will display on the map. A written summary of the VTRANS need location
and justification is displayed below the map.
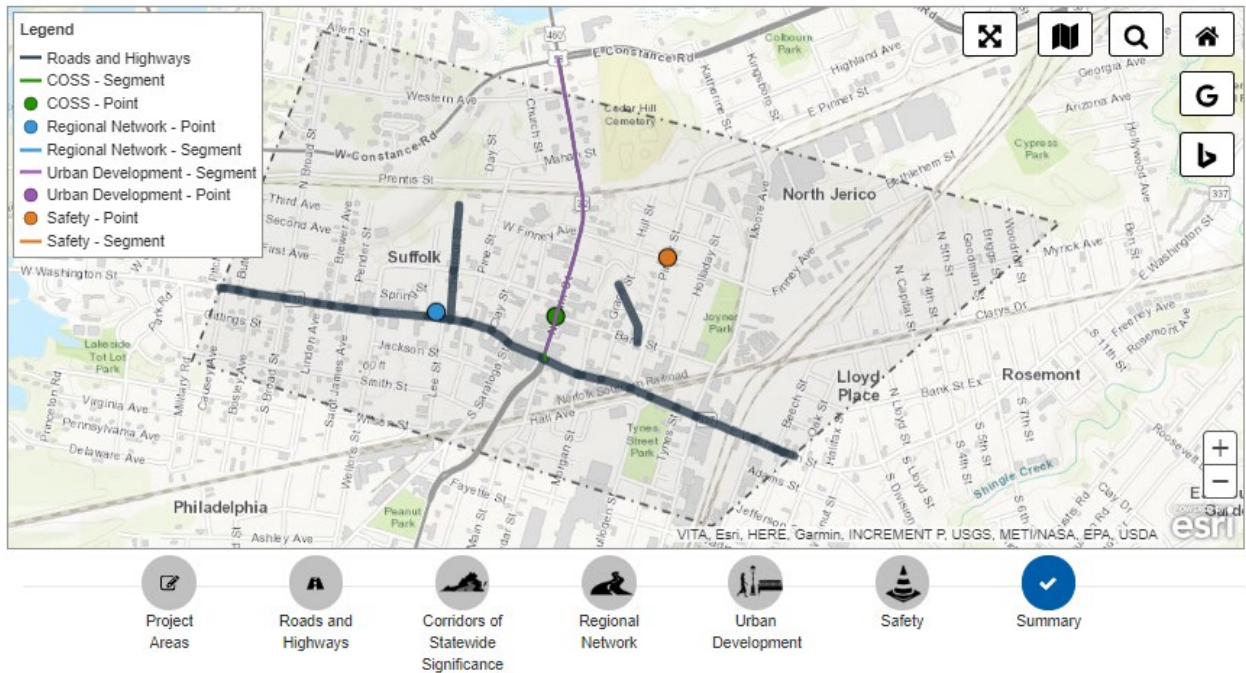
Need Justifications

Corridors of Statewide Significance

Need Id	Need Location	Need Categories	Justification
402333	Roadway Intersection: Bank St PR/NP (Suffolk City), UR-8514E/W (Suffolk City)	Safety Improvement CoSS	coss 1
111629	VA-32N: N Main St	Congestion	No Justification provided

Regional Network

Need Id	Need Location	Need Categories	Justification
400642	Activity Center (Local-serving): Downtown Suffolk	New or Enhanced Transit Access	rn 1

Urban Development

Need Id	Need Location	Need Categories	Justification
111622	VA-32S: N Main St	Road Capacity, Road Operations, Intersection Design, Street Grid, Safety Features, Traffic Calming, Signage, Transit Frequency, Transit Operations, Transit Capacity, Transit Facilities, Bike Infrastructure, Pedestrian Infrastructure, Complete Streets, Sidewalks, On-street Parking, Off-street Parking, Environment	ud 1

Safety

Need Id	Need Location	Need Categories	Justification
401329	Roadway Intersection: Finney Ave PR/NP (Suffolk City), UR-8508E/W (Suffolk City)	Safety Improvement	safe 1

[Click here for a video tutorial on completing the Location section of the application.](#)

Features

The Applicant selects features associated with the project. Features are categorized by principal improvement type:

- Highways Improvements
- Bicycle and Pedestrian Improvements
- Bus Transit Improvements
- Rail Transit improvements
- Intercity Passenger Rail
- Freight Rail
- Travel Demand Management
- Right-of-Way Utilities

Click the checkbox next to all features that apply. The user will be required to provide a description for the selected features. Some features will also prompt the user upload additional documentation.

Highway Improvements ⓘ

Project Features (check all that apply)	Description (type, quantity, location)
☑ Add New Through Lane(s) ⓘ ⧉ Please upload a Planning Study/Safety Study for your project if not done during pre-app	(4000 character maximum)

Factors

The Applicant provides supporting information for the factors used in evaluating the project. Based on certain project feature selections, some of the factors may be pre-selected. Provide a response and supporting information when required.

Accessibility	Response	Supporting Information
1- Project includes transit system improvements or reduces delay on a roadway with scheduled peak service of one transit vehicle per hour.	● Yes ○ No	(4000 character maximum)

Delivery/Funding

The Applicant will select the project delivery information, phase estimate and schedule, and funding sources. The application will populate with information entered on the pre application.

Project Delivery

Select project delivery information by clicking on all boxes that apply.

Project Planning Status ℹ️

☐ Constrained Long Range Plan (MPO)
☑ Preferred Alternative (NEPA or Planning Level)
☐ Vision Long Range Plan (MPO)
☐ Rural Long Range Plans
☑ Other Regional Plan
☐ Transportation Element of Local Comprehensive Plan
☐ Planning/Safety Study
☐ State Transportation Plan
☐ Transit Development Plan (TDP)
☐ NEPA Study

Phase Estimates and Schedule

The phase estimate will populate with information from the pre application. The Applicant will input the remaining required phase information for PE, RW, and CN. To add a project phase, click Add Project Phase in the upper right.

The Applicant will select a Status for each phase. The information required for a given phase depends on the selected status. The phase statuses are Not Needed, Not Started, Underway, and Complete.

- **Not Needed** - No information required.
- **Not Started, Underway, or Complete** –

  For the PE and RW phases, enter the Base Cost Estimate, select Risks/Contingency/Unknowns percentage from the drop down, and enter the project start date. Hover over the blue information tip next to a given field for further detail on the calculation, definition, or formatting for that field.

  For the CN phase, enter the Base Cost Estimate, select Risks/Contingency percentage from the drop down, select CEI percentage from the drop down, and enter the project Start and End Date.

| Phase Milestone | | | | Status | | | |
| CN (Construction, Oversight, Contingencies) 🛈 | | | | Not Started | | ⌄ | |

Base Cost Estimate (in 2020 dollars)	Risks/Contingency 🛈		Start Date 🛈		End Date 🛈	
$ 4,500,000	5%	⌄	2020-12-02	📅	2021-03-03	📅
	CEI 🛈					
	5%	⌄				

Phase Estimate + Contingency + CEI + Inflation 🛈
$5,134,140

The Start and End Date can be entered manually in YYYY-MM-DD format or by using the calendar prompt. To use the calendar prompt click the calendar icon 📅 next to the date field. Click the arrows to the left and right of the Month YYYY to scroll month by month.

Start Date 🛈

| | 📅 |

‹	March 2020	›
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
10	01	02	03	04	05	06	07
11	08	09	10	11	12	13	14
12	15	16	17	18	19	20	21
13	22	23	24	25	26	27	28
14	29	30	31	01	02	03	04
15	05	06	07	08	09	10	11

Today Clear   Done

End Date 🛈

| | 📅 |

‹	March 2021	›
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
9	28	01	02	03	04	05	06
10	07	08	09	10	11	12	13
11	14	15	16	17	18	19	20
12	21	22	23	24	25	26	27
13	28	29	30	31	01	02	03
14	04	05	06	07	08	09	10

Today Clear   Done

Click the Month YYYY to view all months.

Start Date 🛈

| | 📅 |

‹	2020	›
January	February	March
April	May	June
July	August	September
October	November	December

Today Clear   Done

Click the arrows to the left and right of the YYYY to scroll year by year. Click YYYY to select the year from a list organized in 20 year intervals.

Click the arrows to the left and right of the YYYY-YYYY interval to scroll in 20 year intervals.

Click **Today** to default to today's date. Click **Clear** to clear the date. Click **Done** to close the calendar prompt.

When all cost information has been entered, the total cost estimate will populate

.

Project Funding Sources

Applicants will enter the funding sources for the project in the form of SYIP Allocations or Other Committed Funds. Complete the requested information, if applicable.

The Project Financial Information at the bottom of the section provides a summary of the funding sources, total SMART SCALE funds requested, and total cost estimate.

Project Financial Information ⓘ

Total SYIP Allocations	$0
Total Other Committed Funds	$0
Total SMART SCALE Requested Funds	$6,215,640
Total Project Funding	$6,215,640
Total Cost Estimate	$6,215,640

[Click here for a video tutorial on completing the Delivery/Funding section of the application.](#)

Economic Development Sites

The Applicant will enter information for the economic development sites. Click Map It! to begin entering sites.

Is this transportation project referenced in local Comprehensive Plan, local Economic Development Strategy or Regional Economic Development Strategy?
○ Yes
○ No

Economic Development Sites

−	Remove Site
Map It! ⦿ 🚗	

+ Add Economic Development Site

Applicants will be prompted to identity parcels and sites. There are four options:

1. Select Parcels – Select from existing parcels. Follow the prompt to complete selections.

   Selecting Parcels...   Cancel
   Click on a parcel and then click select to choose it. If a parcel does not appear on the map, zoom in closer to see if parcel data is available in the locality. Otherwise click cancel and draw the parcel.

   Keep selecting parcels or click done.

   Done

2. Draw Parcel – Draw a new parcel. Follow the prompt to complete selections.

   Drawing Parcel...   Cancel
   Click on the map where you want your shape to start.

3. Select Existing Sites – Select from existing economic development sites. Follow the prompt to complete selections.

Selecting Existing Sites...   **Cancel**

Site Name	▾	Area (sqf)	Distance (mi)	Zoom To	
Site 1		481107.93	0	◎	▲
Site 1		481107.93	0	◎	
Fancy New Site		245898.8	0	◎	▼

◂   ▸

Keep selecting existing sites or click done.

Done

4. Select VEDP Sites – Select VEDP Business Ready Sites. Follow the prompt to complete the selections.

Selecting VEDP Business Ready Sites...   **Cancel**

Site Name	Calculated Area (sqf)	Distance (mi)	Zoom To	
12063 Washington Hwy Hanson Pipe Site	2984342.31	45.04	◎	▲
Holland Axselle	11799095.15	39.93	◎	
James River Industrial Center	33001521.67	74.04	◎	▼

After selecting the parcels and sites, continue to routing by clicking the green routing button **Routing ◉** .

Parcels

ID	Remove	Zoom To	
Parcel Area 2	✖	◎	▲
Parcel Area 3	✖	◎	
Parcel Area 4	✖	◎	▼

◂   ▸

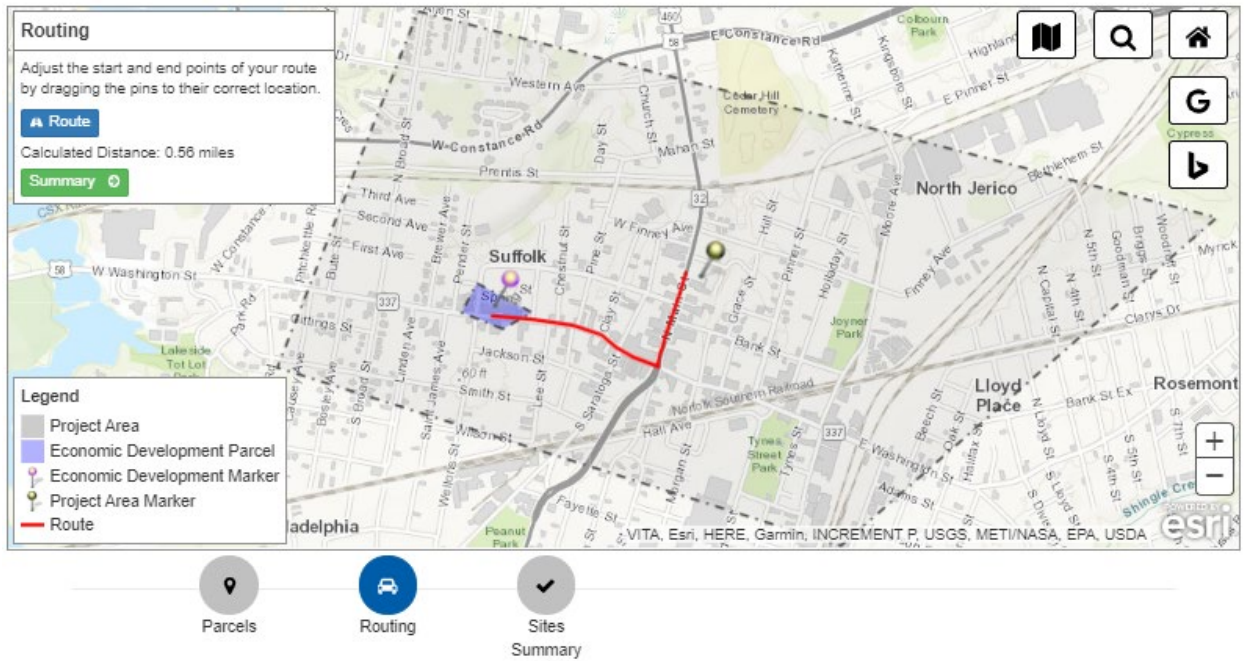**Select Parcels** **Draw Parcel** **Select Existing Sites**

Select VEDP Sites

Finished?

Routing ◉

Follow the prompt to complete routing. Note the legend in the lower left for reference.

When the Applicant is done mapping the economic development site, close the window by clicking the red X in the upper right. The user will return to the full application to complete the remaining information associated with the economic development site. Based on the answers to certain questions the Applicant will be prompted to upload required documentation.

To add sites, click Add Economic Development in the lower left. To remove a site, click Remove Site for the respective site.

Click here for a video tutorial on completing the Economic Development Sites section of the application.

Supporting Documents

Supporting documents will be required based on the response to questions throughout the application. Applicants will be prompted with a reminder for required uploads. To add an attachment, click Add New Attachment. The user will be prompted to select a file to upload.

After selecting a file to upload, the user will be prompted to enter a Description for the document and select the Attachment Type. Select the green Upload button to attach the document. Click the red trash can icon to remove the attachment.

Pending Uploads:

Description	Attachment Type	File Name	
DCE	Detailed Cost Estimate	Attachment document test.docx	Upload 🠕 🗑

Once documents have been uploaded, the Applicant can utilize filters to sort through documents by Description/File Name or Attachment Type. To download files, the user can Click the File Name hyperlink in the grid, or use the checkbox next to each attachment and then click Download Selected Attachments. Select Download All Attachments to download all. To discard an attachment, click the red trash icon.

Current Attachments:

Filter By:

Description/File Name:	Attachment Type:	
Description/File Name...		↻ Reset Filters

	Description	Attachment Type ⓘ	File Name		
☐	Project Sketch	Project Sketch	Attachment document test.docx	ⓘ	🗑
☐	Site plan	Site Development Plan	Attachment document test (1).docx	ⓘ	🗑
☐	DCE	Detailed Cost Estimate	Attachment document test (3).docx	ⓘ	🗑

📄 Download Selected Attachments   📄 Download All Attachments

State's Understanding

Central Office Validator, District Validator, and Applicant come to agreement on the State's Understanding of the Project Scope (SUPS).

Central Office Validator

The workflow begins with the Central Office Validator who will enter the State's Understanding of the Project Scope by clicking on Enter SUPS.

Enter the State's Understanding and click Submit & Request District Agreement when complete. The SUPS will go to the District Validatior for concurrence.

District Validator

The District Validator can either agree or disagree with the SUPS as defined by the Central Office Validator. If the District Validator agrees with the SUPS, select I Concur.

A timestamp is populated for the District Validator in the Review and Approval section as "Agreed On." The SUPS will go to the Applicant for concurrence.

If the District Validator does not agree with the SUPS, select I Do Not Concur. Enter the explanation and select Submit Comment.

A timestamp is populated for the District Validator in the Review and Approval section as "Disagreed On." The explanation will appear in the Comments section of the application. The explanation is visible to the Applicant, who can acknowledge the comment. The parties will coordinate to resolve the concurrence.

Once the concurrence is resolved, the District Validator will select I Concur. A timestamp is populated for the District Validator in the Review and Approval section as "Agreed On." The SUPS will go to the Applicant for concurrence.

Applicant
The Applicant can either agree or disagree with the SUPS. If the Applicant agrees with the SUPS, select I Concur.

A timestamp is populated for the Applicant in the Review and Approval section as "Agreed On." The SUPS is complete.

If the Applicant does not agree with the SUPS, select I Do Not Concur. Enter the explanation and select Submit Comment.

A timestamp is populated for the Applicant in the Review and Approval section as "Disagreed On." The explanation will appear in the Comments section of the application. The explanation is visible to the Central Office Validator and District Validator, who can acknowledge the comment. The parties will coordinate to resolve the concurrence.

Once the concurrence is resolved, the Applicant will select I Concur. A timestamp is populated for the Applicant in the Review and Approval section as "Agreed On." The SUPS is complete.

SMART SCALE Full Application – Video Tutorials

- General - https://www.youtube.com/watch?v=W1_tJ1tzxCI
- Location - https://www.youtube.com/watch?v=xVUWSjaFDIQ

- Delivery/Funding - https://www.youtube.com/watch?v=VsToSL0fCAU
- Economic Development Sites - https://www.youtube.com/watch?v=Pc29Vqc-IwQ

District Validation

Users with the District Validator role can perform validation while applications are in the Pending, Submitted, and District Validation status. Based on the application status, there are slight variations in the validation process highlighted in this guide.

To begin, the District Validator will select District Validation in the application header.
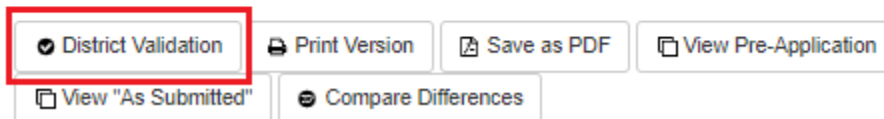
The District Validation table of contents will expand to show each section of the validation. Click on a given section to see the specific items that need validation. Note the Pending status of the validation item. Click on the specific item to begin validating. The status bar, showing 0 of 33 completed, will populate as the validation items are completed. Also, note the red X in the upper right to exit District Validation. The Back button returns to the most recently reviewed validation item.
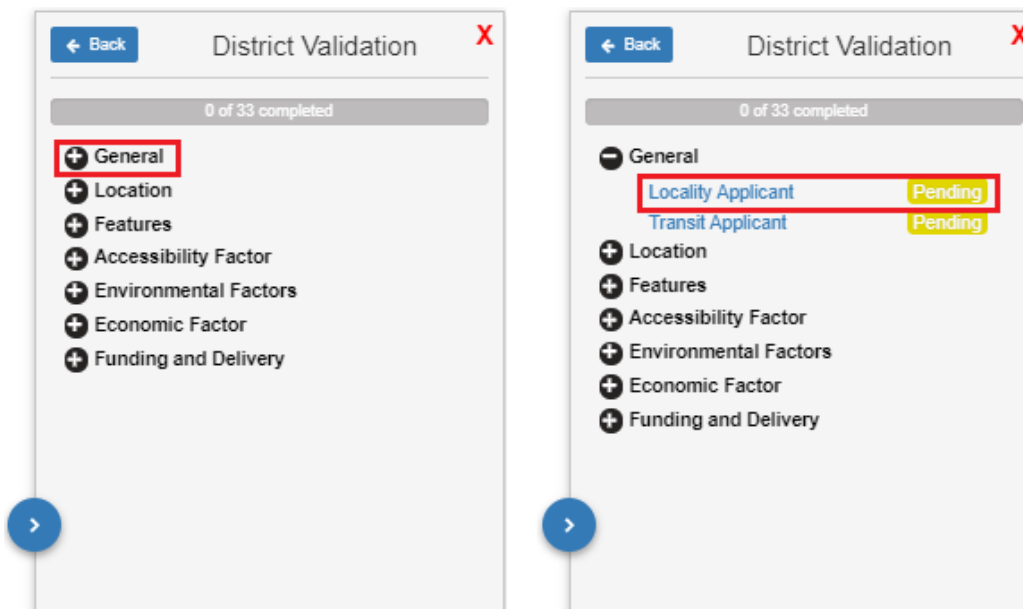
After clicking a specific validation item, the panel will display the validation requirements for that item.

The TOC button returns to the table of contents.

The arrows to the left and right of the section header skip by section. The status bar will populate as the validation items for that section are completed.

Select Valid or Invalid. Comments are required when the response is Invalid and optional when the response is Valid.

IMPORTANT: Save any comments or action taken. Otherwise, the information will not save when the panel is closed.

Next Question takes the user to the next question in the given section.

You must click Save to retain any comments or action taken in the validation panel. Otherwise the information will not save when the panel is closed.

If the item is marked Invalid, the District Validator will be prompted to enter a comment. Click save. The name of the District Validator and the time of the update will be displayed in the panel.

After the validations have been entered and saved, return to the TOC. There will be a prompt for ungenerated Alerts. To generate the alerts, click on the check box next to all desired validation items. Click Generate Alerts.

After the alerts have been generated, there are slight variations in the process based on whether the application is in Pending, Submitted, or District Validation status.

For applications in Pending status, the Applicant will receive an *alert* indicating that a validation item was marked Invalid. The District Validator's comment from the validation panel will appear in the Comments section of the application as an alert. The Applicant and District Validator can communicate through the Comments to the resolve the issue.

When the Applicant makes a change on the application to fix a validation item with an Invalid status, the District Validator will see the status of that item change from Invalid to Revalidate in the panel. This indicates that the District Validator needs to review the item again. In the panel, the District Validator can click on the item to review the original Invalid comment response.

When the issue is resolved, the District Validator will change the validation response to Valid in the panel. On the TOC, the validation item will display a status of Valid.

In the Comments section, the District Validator will need to indicate that any Alerts from validation are Resolved. Alerts must be resolved before the application can be submitted

For applications in Submitted status, the Applicant will receive an *alert* indicating that a validation item was marked Invalid. The District Validator's comment from the validation panel will appear in the Comments section of the application as an alert.

The Applicant will need to Unsubmit the application in order to make any changes to address an Invalid item. The applicant will click Unsubmit in the application header. Enter Edit view to make changes.

When the Applicant makes a change on the application to fix a validation item with an Invalid status, the District Validator will see the status of that item change from Invalid to Revalidate in the panel. This indicates that the District Validator needs to review the item again. In the panel, the District Validator can click on the item to review the original Invalid comment response.

When the issue is resolved, the District Validator will change the validation response to Valid in the panel. On the TOC, the validation item will display a status of Valid.

In the Comments section, the District Validator will need to indicate that any Alerts from validation are Resolved. Alerts must be resolved before the application can be resubmitted
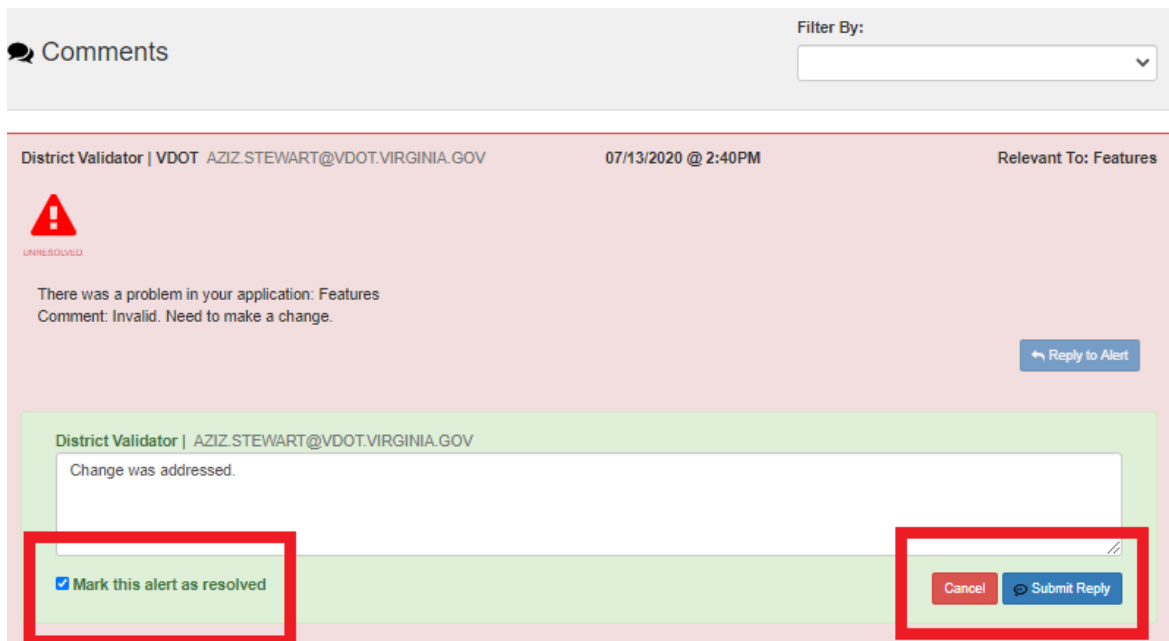
For applications in District Validation status, the Applicant will receive a *concurrence alert* indicating that a validation item was marked Invalid. The District Validator's comment from the validation panel will appear in the Comments section of the application as a concurrence alert. The Applicant can respond to the alert and provide concurrence, but cannot edit the application.

Upon concurrence, the District Validator will make changes to the application by selecting Edit Application in the header. The District Validator will also update the item on the validation panel to reflect a Valid status.

After validating the sections of the application, the District Validator will determine if the application is eligible, ready, and reasonable and submit validation.

Appendix

Appendix A - Permissions

Submitter - applicant role

- answer alerts on applications in their organization for assigned programs in the following statuses: Central Office Validation, District Validation, OIPI Regional Network Screening, OIPI Safety Screening, OIPI UDA Screening, Pending, Submitted
- create comments on applications in their organization for assigned programs in the following statuses: Central Office Pre-Screening, Central Office Validation, District Pre-Screening, District Validation, OIPI COSS Pre-Screening, OIPI COSS Screening, OIPI Regional Network Pre-Screening, OIPI Regional Network Screening, OIPI Safety Pre-Screening, OIPI Safety Screening, OIPI UDA Pre-Screening, OIPI UDA Screening, Pending, Pre-Screening, Pre-Screening Bypassed, Scoring, Screened In, Screened Out, Submitted
- view comments on applications in their organization for assigned programs in any status
- during the intake period, create applications in their organization for assigned programs
- during the intake period, prioritize applications in their organization for assigned programs in the following status: Submitted
- during the intake period, submit applications in their organization for assigned programs in the following status: Pending
- during the intake period, update applications in their organization for assigned programs in the following status: Pending
- view applications in their organization for assigned programs in any status
- view users in their organization
- during the intake period, unsubmit applications in their organization for assigned programs in the following status: Submitted
- view validation on all applications for assigned programs in any status
- can give concurrence for applications in their organization for assigned programs in any status

Editor - applicant role

- answer alerts on applications in their organization for assigned programs in the following statuses: District Validation, OIPI COSS Screening, OIPI Regional Network Screening, OIPI Safety Screening, OIPI UDA Screening, Pending, Submitted
- create comments on applications in their organization for assigned programs in the following statuses: Central Office Pre-Screening, Central Office Validation, District Pre-Screening, District Validation, OIPI COSS Pre-Screening, OIPI COSS Screening, OIPI Regional Network Pre-Screening, OIPI Regional Network Screening, OIPI Safety Pre-Screening, OIPI UDA Pre-Screening, OIPI UDA Screening, Pending, Pre-Screening, Pre-Screening Bypassed, Scoring, Screened In, Screened Out, Submitted
- view comments on applications in their organization for assigned programs in any status
- during the intake period, create applications in their organization for assigned programs
- during the intake period, update applications in their organization for assigned programs in the following status: Pending

- view applications in their organization for assigned programs in any status
- view users in their organization
- can give concurrence for applications in their organization for assigned programs in any status

Viewer - applicant role
- view comments on applications in their organization for assigned programs in any status
- view applications in their organization for assigned programs in any status
- view users in their organization

Organization Administrator - applicant or VDOT role
- archive users in their organization
- create users in their organization
- update users in their organization
- view users in their organization
- view their organization
- view roles in their organization
- Can assign/unassign role to a user roles in their organization

District Validator - VDOT role
- answer alerts on applications for assigned districts for assigned programs in the following statuses: Central Office Validation, District Bridge Engineer Review, District Validation, OIPI COSS Screening, OIPI Regional Network Screening, OIPI UDA Screening, Pending, Submitted
- create comments on all applications for assigned programs in the following statuses: Central Office Pre-Screening, Central Office Validation, District Pre-Screening, District Validation, OIPI COSS Pre-Screening, OIPI COSS Screening, OIPI Regional Network Pre-Screening, OIPI Regional Network Screening, OIPI Safety Pre-Screening, OIPI Safety Screening, OIPI UDA Pre-Screening, OIPI UDA Screening, Pending, Pre-Screening, Pre-Screening Bypassed, Scoring, Screened In, Screened Out, Submitted
- view comments on all applications for assigned programs in any status
- create alerts on applications for assigned districts for assigned programs in the following statuses: Central Office Validation, District Bridge Engineer Review, District Validation, OIPI COSS Screening, OIPI Regional Network Screening, OIPI Safety Screening, OIPI UDA Screening, Pending, Submitted
- update all applications for assigned programs in the following statuses: District Validation, MMWG Screening Validation, OIPI COSS Screening, OIPI Regional Network Screening, OIPI Safety Screening, OIPI UDA Screening, Pre-Screening
- view all applications for assigned programs in any status
- view all users
- view internal status names on all applications for assigned programs in any status
- view validation on all applications for assigned programs in any status
- perform validation on applications for assigned districts for assigned programs in the following statuses: District Pre-Screening, District Validation
- can request concurrence for applications for assigned districts for assigned programs in any status
- perform district validation on applications for assigned districts for assigned programs in the following statuses: District Validation, MMWG Screening Validation, OIPI COSS Screening, OIPI Regional Network Screening, OIPI Safety Screening, OIPI UDA Screening, Pre-Screening, Submitted
- view district validation on applications for assigned districts for assigned programs in the following statuses: MMWG Screening Validation, OIPI COSS Screening, OIPI Regional Network Screening, OIPI Safety Screening, OIPI UDA Screening, Pre-Screening

- view validation comments(internal use) all applications for assigned programs in any status

District Reviewer - VDOT role

- answer alerts on applications for assigned districts for assigned programs in the following statuses: Central Office Validation, District Validation, OIPI COSS Screening, OIPI Regional Network Screening, OIPI Safety Screening, OIPI UDA Screening, Pending, Submitted
- create comments on all applications for assigned programs in the following statuses: Central Office Pre-Screening, Central Office Validation, District Pre-Screening, District Validation, OIPI COSS Pre-Screening, OIPI Regional Network Pre-Screening, OIPI Safety Pre-Screening, OIPI Safety Screening, OIPI UDA Pre-Screening, OIPI UDA Screening, Pending, Scoring, Screened In, Screened Out, Submitted
- view comments on all applications for assigned programs in any status
- create alerts on applications for assigned districts for assigned programs in the following statuses: Central Office Validation, District Validation, OIPI COSS Screening, OIPI Regional Network Screening, OIPI Safety Screening, OIPI UDA Screening, Pending, Submitted
- update applications for assigned districts for assigned programs in the following statuses: District Validation, MMWG Screening Validation, OIPI COSS Screening, OIPI Regional Network Screening, OIPI Safety Screening, OIPI UDA Screening
- view all applications for assigned programs in any status
- view all users
- view internal status names on all applications for assigned programs in any status
- view validation on all applications for assigned programs in any status
- perform district validation on applications for assigned districts for assigned programs in the following statuses: District Validation, MMWG Screening Validation, OIPI COSS Screening, OIPI Regional Network Screening, OIPI Safety Screening, OIPI UDA Screening, Pending, Submitted
- view district validation on applications for assigned districts for assigned programs in the following statuses: MMWG Screening Validation, OIPI COSS Screening, OIPI Regional Network Screening, OIPI Safety Screening, OIPI UDA Screening
- view validation comments(internal use) all applications for assigned programs in any status