Disclaimer

This user guide provides applicants, as well as VDOT, DRPT, and Office of Intermodal Planning and Investment (OIPPI) 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.

This user guide is produced, owned, and managed by VDOT – Infrastructure Investment Division (IID) in coordination with the Office of Intermodal Planning and Investment and appropriate VDOT Central Office Divisions. This material may not be altered or used in any way for creation of derivative works without the express permission of VDOT IID.
## Overview and General Process

### Administration

- Login
- Navigation
- Dashboard
- User Permissions
- About
Overview and Workflow

Overview
The SMART Portal is a web-based funding application system, initially developed to facilitate SMART SCALE applications but has grown to include, the Transportation Alternatives Set-Aside, the Revenue Sharing Program, the Virginia Highway Safety Improvement Program, and the State of Good Repair Program, both Bridge and Pavement. The Portal also hosts the Non-VDOT Advertised Project (NVAP) tracking tool.

To find out more information about each program, please visit the About page on the SMART Portal website:

SMART Portal - About

After each round of application submission and scoring, the Portal 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).

General Process
For all applications programs the SMART Portal process is generally structured as follows:

- **Application Development**
- **Review/Validation**
- **Scoring**
- **Project Selection**
- **Inclusion in the SYIP**

SMART Portal User Guidance - 3-7-2022
Login

Before you start...

To Login to the SMART Portal a user must first have an account. If you need an account start within your organization, i.e. locality, regional government, transit agency. Each organization has at least one organization administrator (see user permissions). The organization administrator can set up accounts for all users within the organization.

If there are issues setting up an account based on the above process, then submit an email through:

smartportal@ctb.virginia.gov

All inquiries will be addressed within two business days.

Logging-In

• Navigate to the SMART Portal Welcome Page.

• Select Applicant Sign-In and fill in username (full email) and password information (see image).

• If this is your first time logging in to the SMART Portal, then select “Forgot Password?” and enter your SMART Portal email. An email will be sent to your SMART Portal email and you can set up a Password through that process.

• “Forgot Password?” should also be used to reset your SMART Portal. The SMART Portal requires password updates every three months. If you have not logged in in several months you will be prompted to reset your password.
Login

Home

Once logged in users will land on the SMART Portal Home page. The Home page will only show the programs the user has permission to access. Selecting “Application” will take users to the program-specific Dashboard. Selecting “About” will take the user to the program-specific About page.
Navigation

Banner

At the top of the page when working in the SMART Portal is the SMART Portal Banner.

- To the new application page to start a new application or clone from an existing application
- Specific to Non-VDOT Advertised Projects (NVAP) Users
- To the Login welcome page
- To the Dashboard where applications can be searched
- To the About pages that provide details regarding SMART Portal Programs
Navigation

User Account Information

User account dropdown menu includes some navigation included on the SMART Portal Banner, but also includes user-specific information.
Dashboard

Applications that the user has permission to access can be searched using the SMART Portal Dashboard.
User Permissions

The SMART Portal is structured to allow many users access based on the goals they need to accomplished. For example, a locality needs the appropriate permissions to create applications and request funding. While DRPT, OIPI, and VDOT need the appropriate permissions to review and validate those applications.

Within the SMART Portal there are two types of permissions: System Permissions and Program-Specific Permissions. System Permissions manage what a user can do within the SMART Portal; for example, creating a new user requires Organization Administration permissions.

System Permissions

- view, create, update, assign and archive users in their organization
- view roles in their organization

Organization Administrator
User Permissions

Program-Specific Permissions manage what programs a user can access. The full list of programs in the SMART Portal include:

- SMART SCALE
- Transportation Alternatives
- Revenue-sharing
- Virginia Highway Safety Program
- State of Good Repair - Bridge
- State of Good Repair – Pavement
- Pre-Scoping *(pre-program application development)*

Within each of these programs there are varying program-specific roles. However for the applicant community roles fall into this general structure.

<table>
<thead>
<tr>
<th>Viewer</th>
<th>Editor</th>
<th>Submitter</th>
</tr>
</thead>
</table>
| • view applications in their organization  
• view comments applications in their organization | • during the program intake period, create and update applications in their organization  
• view and create comments applications in their organization  
• answer alerts applications in their organization  
• give concurrence applications in their organization  
• view applications in their organization | • during the program intake period, create, update, submit/unsubmit and prioritize applications in their organization  
• view and create comments applications in their organization  
• answer alerts applications in their organization  
• give concurrence applications in their organization  
• view screenings applications in review/validation processes |
User Permissions

Adding a New User

Users with Organization Administration privileges may add users to their organization as needed. To add a new user:

- Navigate to Organization Administration using the user account dropdown menu.
- On the Organization Administration click the Add a New User button.

- Complete the Add New User Section. Required information includes First Name, Last Name, and Email and click Create User. This is also where user permissions are set. Available permissions are based on organization permissions.
- Once a user has an account they should request to set up their password using the “Forgot Password?” process discussed in the Login section.

SMART Portal User Guidance - 3-7-2022
User Permissions

Editing/Archiving Users

Users with Organization Administration privileges may also edit and archive users within their organization as needed. To edit or archive a user:

• Navigate to Organization Administration using the user account dropdown menu.
• Search for an existing user by email/name using the search box.
• Once the appropriate User Account has been found, select the account and then select Edit this User.
• User SMART Portal Permissions and Program-Specific Permissions can be edited. Permissions are organization specific.
About

Within the SMART Portal there are “About” pages. These pages provide a general overview and points of contact for both the SMART Portal overall and specific programs within the SMART Portal. Using these resources will expedite getting questions to the appropriate point of contact. About pages are also accessible on the public SMART Portal site.

Welcome to SMART Portal! About

To learn more about individual programs, please click their links below:

SMART SCALE  Revenue Sharing  TA  Highway Safety  Bike & Pedestrian Safety  Highway-Rail  SSI  State of Good Repair Bridge
State of Good Repair Pavement  Non-VDOT Administered Projects

SMART Portal overview:

All submitted project applications will be subject to requirements of the Freedom of Information Act (FOIA).

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 and the Department of Rail and Public Transportation. 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 application program click on the About tab.

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.