

Transit Call Recap – March 11th, 2026

- **Finance and Claims Updates:** Beth provided comprehensive updates on claims submission, documentation requirements, contract agreements, vehicle reimbursements, and upcoming deadlines, emphasizing the importance of correct procedures and timely responses from transit agencies and accounting specialists.
 - **Claims Submission Process:** Beth reported that there are currently 30 claims awaiting review and no change requests. Agencies are reminded to upload supporting documentation using the G code as the file name, with salary and fringe documentation combined as one file and other G codes uploaded individually into EBS. All claim letters must be addressed to Beth, and the date on the claim letter and cover sheet must match the date in EBS.
 - **Contract Agreements and Deadlines:** The finance staff is preparing contract agreement packages, which will be sent out once funding awards are received from FTA. February claims are due by March 30th, and final change requests must be submitted by June 30th. Agencies should reach out to their accounting specialist for questions and allow one to two business days for responses.
 - **Vehicle Reimbursement Documentation:** For vehicle reimbursement claims, Beth highlighted the importance of submitting a signed MVR-1 form showing NCDOTIND as the first lien holder. Claims lacking this will be returned for correction. Fully executed third-party contracts must be submitted with the first claim for reimbursement, and specific G codes require contract copies.
 - **Overpayment and Credit Claims:** If IMD contacts an agency about a potential overpayment, a separate email with an invoice will be sent. Agencies must submit a check for reimbursement, after which the accounting specialist will guide them through entering a credit claim. No new claims can be submitted until the credit claim clears.
 - **Capital Project Extensions:** IMD, Procurement, and Finance will evaluate outstanding vehicle and related projects. Projects not scheduled for completion by June 30th will receive a blanket POP extension, with affected agencies notified via email. This process is actively monitored in response to frequent inquiries.
- **Grants Administration and UGA Cycle:** Carolyn and Casondra presented updates on grant applications, approval timelines, the FY28 UGA grant cycle, training opportunities, and the ROAP program, stressing streamlined processes and the need for timely participation and feedback from agencies.
 - **Grant Application Status:** Carolyn confirmed that internship, apprentice, and 5303 planning applications have been approved at the March Board of Transportation meeting, with final UPWP submissions due by March 27th. Remaining state funding applications are under review and will be presented at the April or May board meetings.

- **FY28 UGA Grant Cycle Launch:** The FY28 UGA grant cycle opens April 1st and closes October 2nd. The IMD planning team has streamlined the process based on stakeholder feedback, and agencies are encouraged to use the feedback button in UGA for suggestions. Comprehensive training sessions are scheduled for new and experienced directors, with details sent via email.
 - **ROAP Program Closeout and Reporting:** Casandra reminded agencies that the ROAP grant year closeout is being streamlined to enable earlier fund disbursement, requiring active participation. For FY26, 72% of ROAP allocations and 71% of EDTAP funds have been expended, with monthly reports due at the end of each month and final approvals required within four days.
 - **System-Specific Grant Matching Guidance:** Following recent financial training, Casandra noted that agencies with questions about using ROAP reports to cover local match portions of other grants should contact their RGS or Casandra directly for system-specific guidance and options.

- **Procurement and Compliance Updates:** Blair and Chris provided updates on statewide vehicle IFB progress, heavy-duty bus contracts, procurement template requirements, third-party contract compliance, and the transition to digital compliance reviews, with Kevin outlining upcoming changes to review formats and data collection.
 - **Statewide Vehicle IFB and Bus Contracts:** Blair announced that the NCDOT purchasing review of the statewide vehicle IFB is nearly complete, with posting expected soon and a 30-day advertisement period. The heavy-duty large bus IFB is also nearing completion.
 - **Procurement Template and Regulations:** All subrecipients must submit the updated agency procurement template, which incorporates new procurement regulations and thresholds. Agencies have until August 14th to comply, and Blair is available for questions.
 - **Procurement Compliance:** Chris emphasized the need to notify IMD Procurement of any third-party contract extensions, amendments, or exercised options. All projects over \$15,000 must use Procurement Pro, and formal solicitations over \$90,000 require draft document review prior to posting.
 - **Digital Compliance Review Transition:** Kevin reported that all CY25 compliance reviews have been conducted, with 12 closed and 26 in progress. Starting with CY26, reviews will be fully digital via Smartsheet, enabling better data analysis and targeted training, with legal references added for clarity.

- **Training Programs and Upcoming Events:** Kim outlined completed and upcoming training sessions, including drug and alcohol management, boot camps, CCAM website training, Transit Academy, and safety/security topics, with registration details and priorities based on survey feedback.
 - **Recent and Upcoming Trainings:** Kim confirmed completion of drug and alcohol program management and reasonable suspicion determination trainings, with certificates pending. The boot camp is overbooked, and another session is planned for the fall. The CCAM website and fund rating class was rescheduled to April 7th.

- **Transit Academy and Specialized Trainings:** Transit Academy starts in May in Winston Salem, with registration links forthcoming. Additional trainings include emergency procedures, violence in the workplace, and accident preparedness, with in-person sessions planned across the state.
- **Training Needs Assessment:** Survey results identified procurement compliance, fully allocated cost of service, contract pricing, and operations budgeting as top financial management training priorities. For safety and security, emergency procedures, workplace violence, and incident preparedness were most requested.
- **Office of Civil Rights Census Data Training:** Shirley reminded subcontractors of upcoming Office of Civil Rights Census data collection trainings on March 19th and April 15th, with registration links available via Shirley or Kim and posted on the comms hub.
- **Contact Information and Calendar Updates:** Blair requested agencies to update contact details, emergency contacts, and staffing information via Smartsheets, and reviewed the monthly calendar of reporting deadlines, training sessions, and upcoming events, including holidays and conference schedules.
 - **Contact Update Request:** Blair is sending out a Smartsheet Update Requests for agencies to review and update contact information, emergency contacts, executive details, and staffing numbers. Agencies are asked to submit changes promptly to ensure accurate records for IMD and related teams.
 - **Monthly Calendar and Reporting:** Blair highlighted key dates for claims, financial reports, ROAP reports, and upcoming training sessions. The next transit call is scheduled for April 8th, with additional webinars and events listed on the Communication Hub and calendar links provided for easy access.