

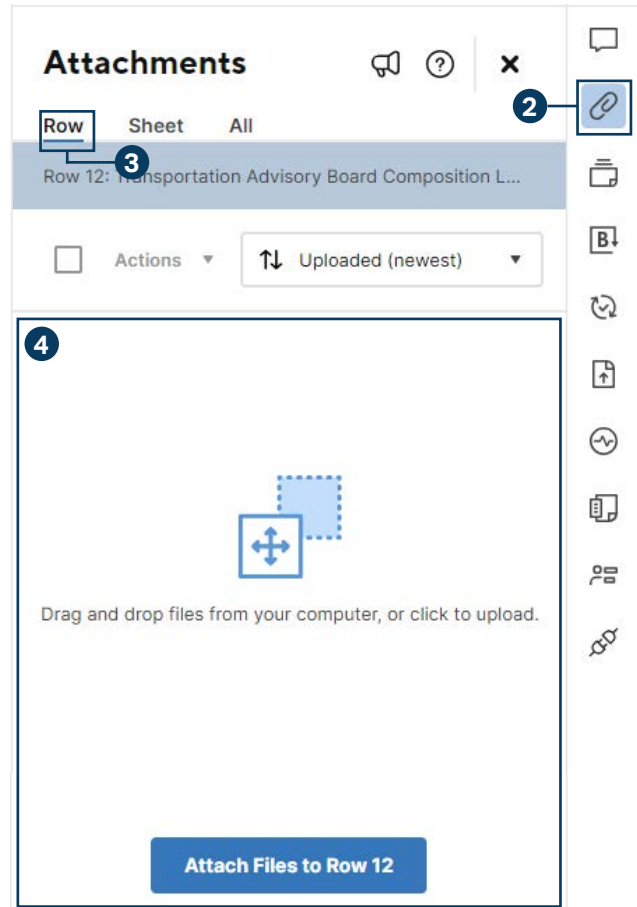
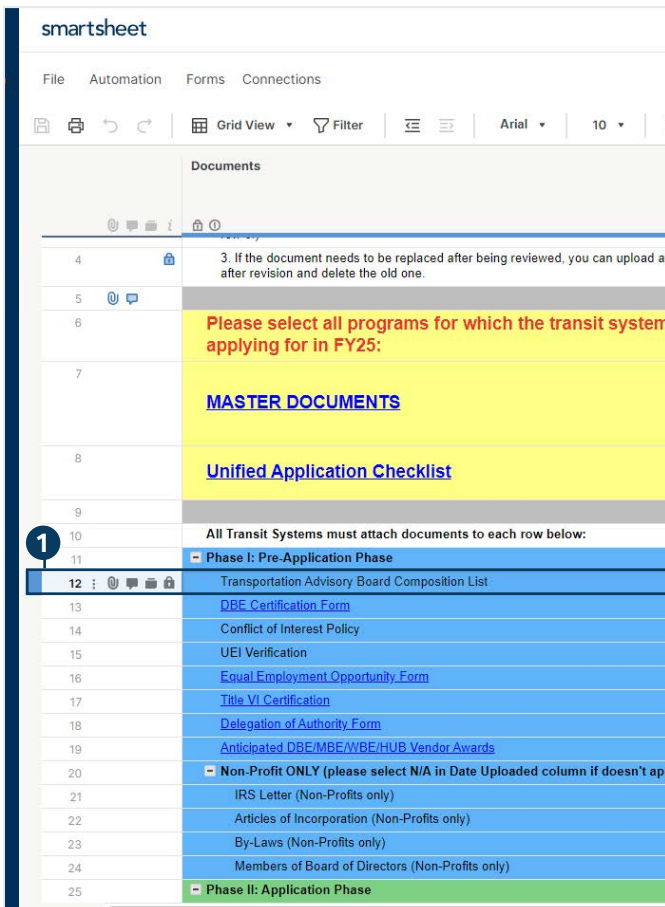
Smartsheet Quick Reference Guide

Smartsheet is an online spreadsheet management tool where North Carolina Department of Transportation (NCDOT) Integrated Mobility Division (IMD) partners can submit online forms and access the Unified Grant Application (UGA) submission workspace. IMD uses Smartsheet throughout the UGA application processes including pre-application registration and application document submission. Smartsheet allows you to attach details and share comments creating one location to access and collaborate in real time. Please refer to [Smartsheet Help and Learning](#) if you want to know more about Smartsheet. For assistance with your Smartsheet account, please refer to this [help article](#).

Smartsheet Grid (Sheet) Key Features

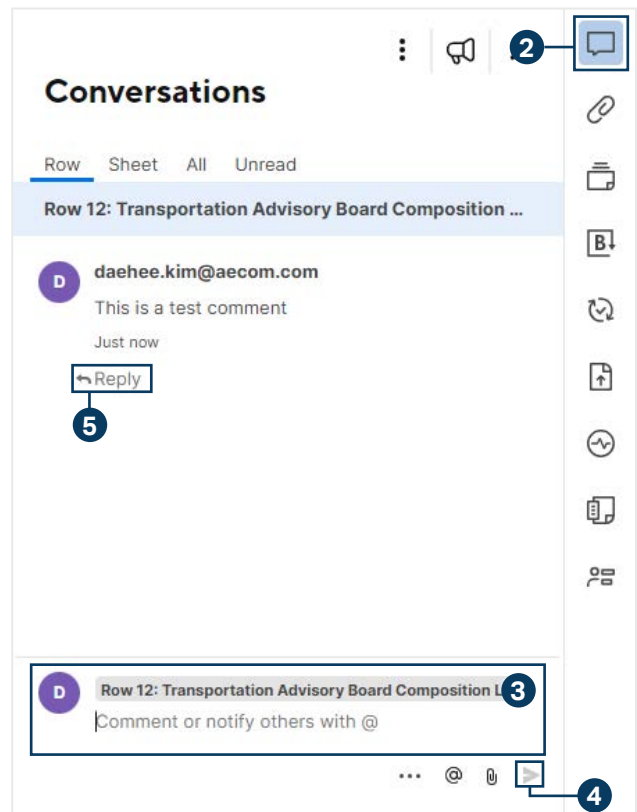
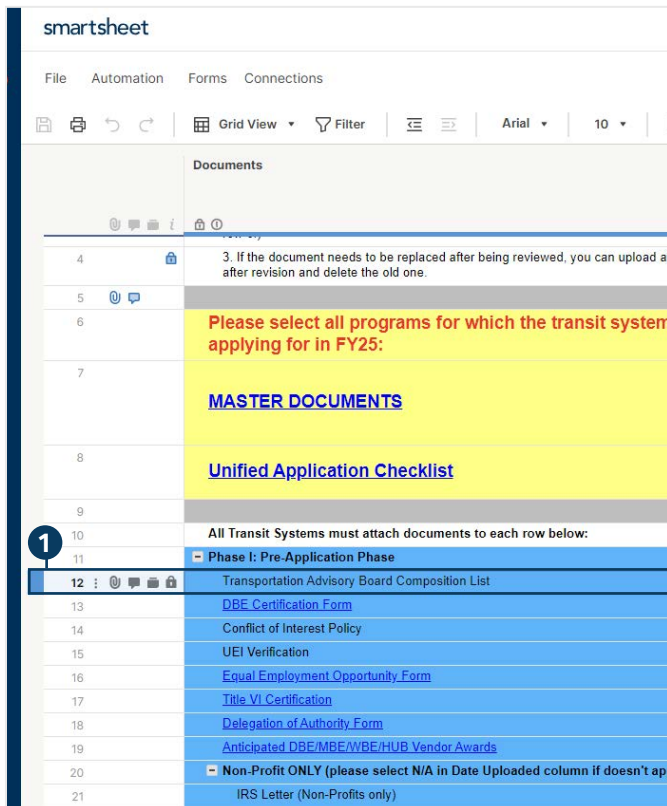
Attach files to rows

In a sheet, you can attach files to each row. To attach files at the row level, **1** Select the row you want to attach files to. **2** Select the Attachments icon. **3** Select the Row tab. **4** Drag any files to the Attachments pane, or select the Attach Files to Row # button.



Add/Reply to comments (conversations)

Should there be any feedback from your [RGS](#) (Regional Grant Specialist) or if you have any question/notes you can use **Conversations** pane. To add a comment in a sheet or report, **1** Select the row where you want to leave a comment. **2** Go to the **Conversations** panel. **3** In the comment box, type your comment. You can use '@' symbol to tag people in comments. **4** Select **Post comment**. **5** In the comment where you want to reply, select **Reply**.



Smartsheet Form Key Features

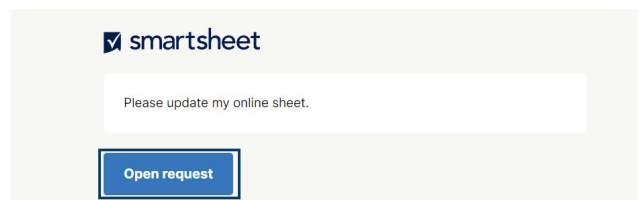
Completing Smartsheet forms

Smartsheet forms make it fast and easy to collect application information. If you exit a form without submitting it the data will not be saved. Please make sure you have all information ready before working on Smartsheet forms. You can save the copy of the form for your record by clicking 'Send me a copy of my responses' button located at the bottom of a form (see the screenshot below).



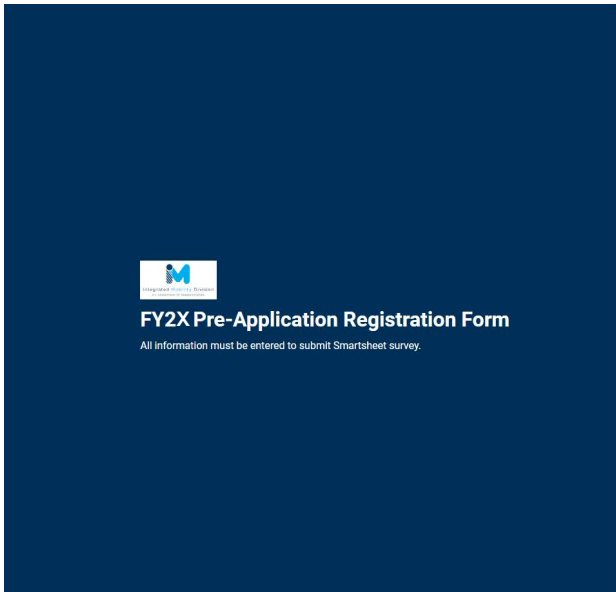
How to resubmit a form or do a revision

Should there be any changes to the original form submission, you can ask for a revision by reaching out to your [RGS](#). You will receive an auto-generated email where you can open an **Update Request** (see the screenshot below). You can also re-submit the form and inform your [RGS](#) if that is easier.



Pre-Application Registration Form

Each applicant needs to complete a Pre-Application Registration Form each year to begin the application process. Once you submit the form your RGS will contact you with the instructions for next steps. Please refer to the current UGA Guidance on the [UGA webpage](#) for more information about the Pre-Application Registration Form. **Note: only one Pre-Application Registration Form needs to be completed per applicant, regardless of the number of grant programs for which you are applying.**



1) Please enter your contact information:

a. What is your name? *

b. What is your title? *

c. What is your email address? *

d. What is your phone number? *

e. What is your mailing address? *

2) Please enter your organization information

a. Which most specifically describes your organization? *

b. If applicable, please select the name of your organization. *

d. Does your organization plan to include indirect overhead costs in your 5311 funding request (5491)? *

Documentation to support the requested indirect cost rate must be submitted along with the 5311 Admin application. This includes: Signed Certification page from the Cost Allocation Plan (CAP), page(s) from the CAP showing indirect costs allocated to the Transportation Department, page(s) from the Transit system's financial report showing total salaries & fringes paid to the entire Transportation Department staff and an official statement verifying the Cognizant Agency.

Yes
 No
 Not Applicable (no 5311 application)

Pre-Application Materials Form

You may need to submit a Pre-Application Materials Form if you apply for certain funding programs. This Smartsheet form replaces the existing Title VI, Delegation of Authority, Equal Employment Opportunity (EEO), Anticipated DBE, and DBE Good Faith Efforts Certification forms in paper. Please refer to the current UGA Guidance on the [UGA webpage](#) for more information about the Pre-Application Materials form.



Grant Recipient / Applicant Agency *

Date Submitted *

Legal Name of Transit Agency or Organization *

Submitter's Email Address *

Title VI Certification

The following section asks about complaints or lawsuits alleging discrimination which have been filed against your system during the period July 1, 2021 through June 30, 2022.

Name and Title of Authorized Official *

Number of Complaints or Lawsuits *

Part C - Title VI Plan

Do you currently have a Title VI Plan? *

Date of last plan update

Delegation of Authority

Authorized Official's Typed/Printed Name *

Application Submission Workspace

If you successfully submitted a Pre-Application Registration Form, you will be assigned an Application Submission Workspace where you can upload application documents, get feedback, and exit and come back whenever you want. To complete Application Submission Workspace, **1** choose funding programs you are applying for from the dropdown menu. **2** Download Master Documents through the links. **3** Upload the completed application documents for Phase I to each row using the Attachments pane and complete the Smartsheet forms through the links in the Application Submission Workspace. **4** Type the date uploaded.

The screenshot shows the Smartsheet interface for the 'Application Submission, XXX County Template'. The 'Documents' column contains instructions and a list of documents for Phase I: Pre-Application Phase. Callouts are placed as follows:

- 1**: Points to a dropdown menu for 'Programs Transit System is Applying' with 'Combined Capital' selected.
- 2**: Points to a 'MASTER DOCUMENTS' link.
- 3**: Points to the 'Phase I: Pre-Application Phase' document list.
- 4**: Points to a date field in the 'Date Uploaded' column.

5 Upload application documents for Phase II and Phase III and record the date uploaded. **6** Download program specific documents from the link included in the Application Submission Workspace. **7** Upload the completed application documents for specific program(s) you are applying for and record the date uploaded. **NOTE: if you are applying for 5311 and intend to submit an indirect cost rate, prepare the indirect cost rate verification early enough to meet the application deadline. Please refer to the current UGA Guidance on the [UGA webpage](#) for more information about the Application Submission Workspace.**

The screenshot shows the Smartsheet interface for the 'Application Submission, XXX County Template'. The 'Documents' column contains instructions and a list of documents for Phase II: Application Phase and Phase III: Contracting & Compliance Phase. Callouts are placed as follows:

- 5**: Points to the 'Date Uploaded' column for Phase II documents.
- 6**: Points to a link for 'Additional Documents, per Program Applied for:'.
- 7**: Points to a date field in the 'Date Uploaded' column for Phase III documents.

Provide Feedback

Have feedback on this reference guide or want to suggest another topic? Please click [here](#) to complete the form.