

Generating ePPR for SB1 Cycle 5 Projects

Use the following guidance document to create ePPRs for SB1 cycle 5 projects.

- I. [Create ePPRs for Existing Programmed Projects](#)
- II. [Create new ePPRs for Proposed New Projects](#)

Please visit [Office of Capital Improvement Programming \(OCIP\)](#) for a link to [ePPR login screen \(CalSMART\)](#), [ePPR User's Guide](#) and [FAQs](#).

If you need additional information or help with creating ePPRs, please email us at ePPR@dot.ca.gov

I. Create ePPRs for Existing Programmed Projects to request 'new' SB 1 funds

To create an ePPR document for an already programmed project that exists in the CTIPS database, please follow the following steps:

- 1) Select **"Electronic Project Programming Request"** from the Current Program list

The screenshot shows the CalSMART ePPR Admin interface. At the top left is the CalSMART logo. At the top right are navigation icons for Dashboard, ePPR, and Users. The main content area is titled 'Dashboard' and 'ePPR Admin Caltrans HQ'. Below this is a 'Current Program:' dropdown menu with 'Electronic Project Programming Request' selected and highlighted by a red box and a red arrow. Below the dropdown are five main action buttons: 'Create and Manage ePPRs', 'My Profile', 'View Agencies', 'Settings', and 'Help & Resources'. At the bottom, there is a footer with links for 'Back to Top', 'Conditions of Use', 'Privacy Policy', 'Accessibility', and 'Contact Us', along with copyright information for the State of California and a version number 'version 1671816'.

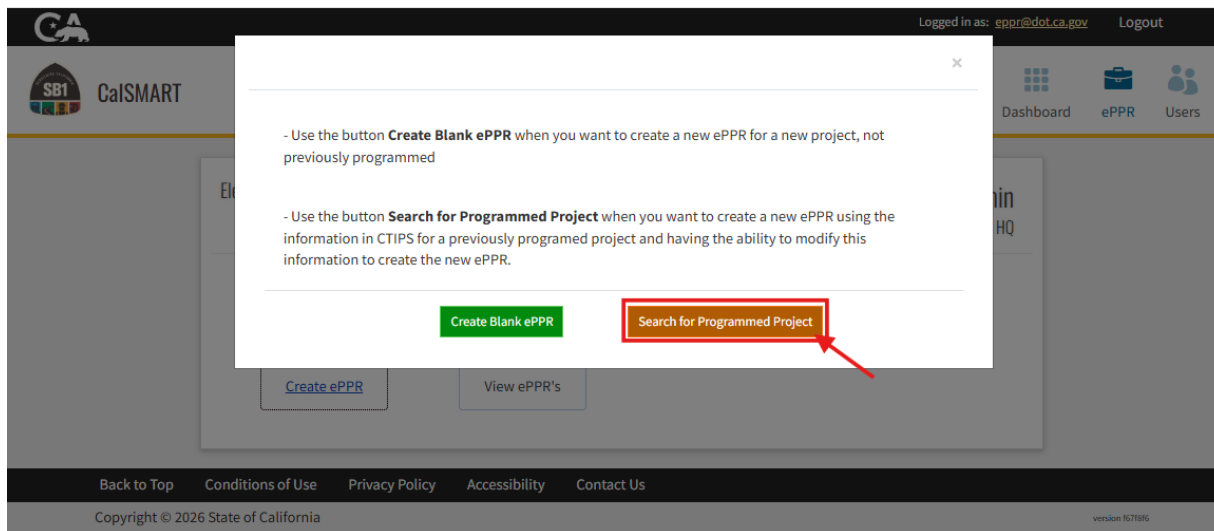
2) Click on “Create and Manage ePPRs”

The screenshot shows the ePPR Admin interface. At the top left is the SB1 CaSMART logo. At the top right are navigation icons for Dashboard, ePPR, and Users. The main content area is titled 'Dashboard' and 'ePPR Admin Caltrans HQ'. Below the title is a 'Current Program:' dropdown menu set to 'Electronic Project Programming Request'. The dashboard features five main action buttons: 'Create and Manage ePPRs' (highlighted with a red box and arrow), 'My Profile', 'View Agencies', 'Settings', and 'Help & Resources'. At the bottom, there is a footer with links for 'Back to Top', 'Conditions of Use', 'Privacy Policy', 'Accessibility', and 'Contact Us', along with copyright information for 2026 State of California and version 1671816.

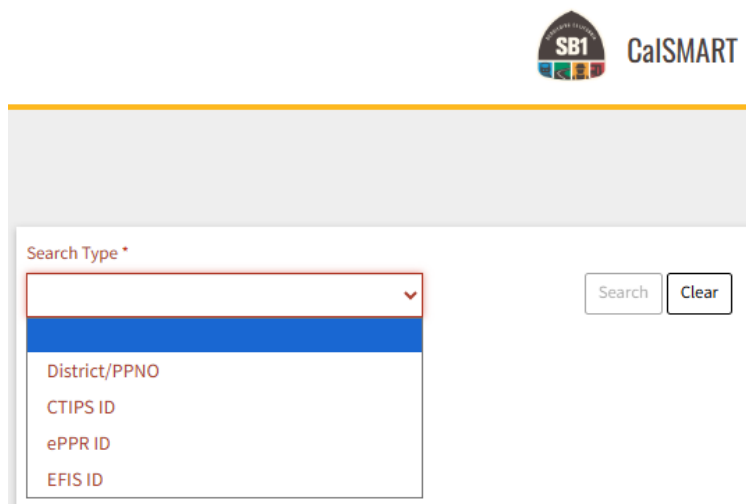
3) Click on “Create ePPR”

The screenshot shows the 'Create and Manage ePPRs' page. At the top left is the SB1 CaSMART logo. At the top right are navigation icons for Dashboard, ePPR, and Users. The main content area is titled 'Electronic Project Programming Request' and 'Create and Manage ePPRs'. Below the title is a 'Current Program:' dropdown menu set to 'Electronic Project Programming Request'. The page features two main action buttons: 'Create ePPR' (highlighted with a red box and arrow) and 'View ePPR's'. At the bottom, there is a footer with links for 'Back to Top', 'Conditions of Use', 'Privacy Policy', 'Accessibility', and 'Contact Us', along with copyright information for 2026 State of California and version 1671816.

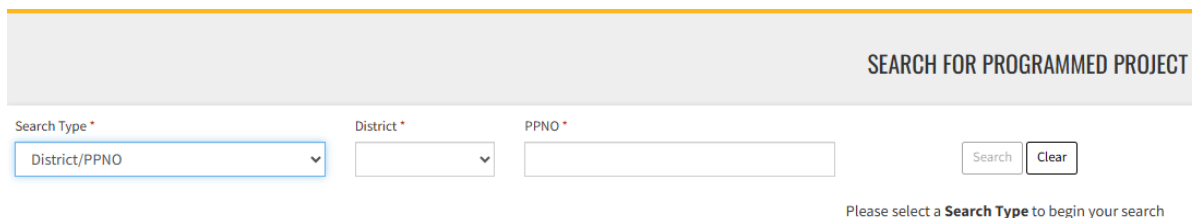
4) Click on “Search for Programmed Project”



5) The projects can be searched using one of the four different keywords:



a) District and PPNO



b) CTIPS ID

SEARCH FOR PROGRAMMED PROJECT

Search Type * ID *

Please select a **Search Type** to begin your search

c) ePPR ID

SEARCH FOR PROGRAMMED PROJECT

Search Type * ID *

Please select a **Search Type** to begin your search

d) EFIS ID

SEARCH FOR PROGRAMMED PROJECT

Search Type * ID *

Please select a **Search Type** to begin your search

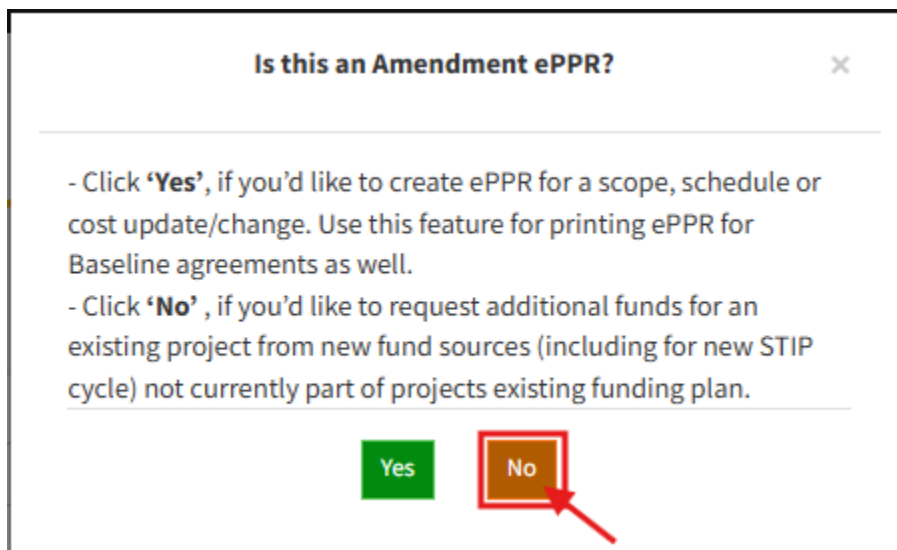
Search the project based on your preferred search keys and check the box in the first column to select a project from the returned search result and click on Create ePPR

SEARCH FOR PROGRAMMED PROJECT

Search Type * District * PPNO *

Select One	CTIPS ID	Title	EA	EFIS ID	District	PPNO	County	Route	Post Mile Back	Post Mile Ahead
<input checked="" type="checkbox"/>	10600000611	Route 87 Guadalupe Freeway Corridor	4874A1		04	2204D	SCL	87	7.600	8.900
<input type="checkbox"/>	10600000566	Route 87 Guadalupe Freeway Corridor	4874Q1		04	2204	SCL	87	6.300	7.100
<input type="checkbox"/>	10600000928	Rt. 87 Landscaping	0A2721		04	2204Y	SCL	87	6.900	9.100
<input type="checkbox"/>	10600000328	Route 87 Guadalupe Freeway Corridor	4874R1		04	2204B	SCL	87	7.600	8.900
<input type="checkbox"/>	10600000927	Rte 87 Landscaping	0A2711		04	2204G	SCL	87	6.300	6.900
<input type="checkbox"/>	10600000326	Guadalupe Freeway Riparian Habitat	487491	040002046	04	2204F	SCL	87	7.600	8.900

- 6) Clicking on **Create ePPR** will generate a pop-up message, asking if you are creating an Amendment ePPR. Select **'No'** as this will be an ePPR for a new fund request.



- 7) **General Info Tab:** A draft ePPR must be saved to proceed further.

- Select **'Program'** from the Program dropdown. Select all the funds that you may request funds for in SB1 cycle 5. Please note that all program funds selected in this section will need an 'uncommitted' funds request from the same fund category in the Proposed Funding Plan section.
- The implementing agencies selected on this page will appear as the only options on the implementing agency tab, so make sure all required agencies are listed here.
- If you'd like to share this ePPR for review while you are working on it, please add the regional agency in the co-nominating agency so that they will be able to view it.
- Fill out all required* fields and click 'Save Draft' in the Sections panel on the right to save draft. This step is required to save the initial draft that can be edited at a later time. **The draft ePPR can be printed as a pdf to send for reviews and comments.** Draft ePPR will contain the draft watermark.

PROJECT PROGRAMMING REQUEST

General Information Fields marked with * are required

Project Title* MPO*

Program*

- STIP
- OTHER
- LPPF
- TCEP
- SCCP
- LPPC

Co-Nominating Agency(s) (type to filter list) ?

- 8) Go through all the tabs listed in the Sections area to the right of the screen and fill out all required* fields for each tab. If the ePPR is created through the Search for Programmed Project, the fields will be prepopulated with the current data for the project. Review and verify that the information on that tab is still relevant and valid. Update the section if it is necessary then click **'Save Draft'** before working on another tab. There may be some data missing in the original programming data but the ePPR validation will require that all required* fields are updated before 'Save as Final' appears on the Review/ Print Tab.

- 9) **Project Header:** Please provide all required information marked with *.

If the Project is located in one, two, or three counties: Select each county from the drop-down menu and type in the route and post mile information associated with each county.

If the Project is located in more than three counties: Select “Various” from the drop-down menu and type in the route.

Header Information Fields marked with * are required

District* EA PPNIO Element*
 01 1234 Capital Outlay

Project ID MPO ID
 000000000

Project Locations

Post Mile Query Tool

Location	County	Route	Route Suffix	Prefix Back	Post Mile Back	Suffix Back	Prefix Ahead	Post Mile Ahead	Suffix Ahead
1	Various								
2									
3									

Contact Information - Project Manager

Name* Phone* Email Address*
 Project Manager's Name (123) 456-7890 project.manager@dot.ca.gov

Click “Save Draft” in the bottom right corner of the screen.

- 10) **Scope and Location:** Please provide a brief description of the project location. See the “Guidelines” section listed below the text box. The “Location (Project Limits)” is a brief description of the project location. The “Description (Scope of Work)” is a brief description of the elements of work. (Note: A more detailed scope and benefits of the project will need to be included in the ‘Purpose and Need’ section.) If additional space is needed use the Additional Information section. Click “Save Draft” at the bottom right corner of the screen.

ePPR ID Version Project Title
 ePPR CT 2025-0009 0 SB1 Cycle 5 Sample

District EA Project ID PPNIO MPO ID County
 01 00000 000000000 1234 VAR

Project Scope and Location Fields marked with * are required

Description/Location *

In (or Near) city or town, on road, from start location to end location. Construct (or install) item of work.

Guidelines -

The “Location (Project Limits)” is a brief description of the project location. The location should start with a listing of cities or communities in which the project is located followed by the cross streets or other distinguishing features that identify the beginning and ending project limits as appropriate. Long distance Rail projects should include a listing of the counties in which the project is located followed by the cities or communities or other distinguishing features that identify the beginning and ending project limits. For rural projects, the nearest community should be identified along with the beginning and ending limits.

Project description should be in the following format (the underlined text represents variables):
 In (or Near) city or town, on road, from start location to end location. Construct (or install) item of work.

If the city has the same name as a county (such as Fresno, Sacramento, Los Angeles, etc.), say “In the city of city”. Don't mention the route if the road is a state highway.

The “Description (Scope of Work)” is a brief description of the elements of work. Generally, the description should be two lines or less, but may require more if the project is more complex with several different activities. A more detailed list of the scope will be included in the Outputs section. If additional space is needed, continue the location, project limits, description and scope of work on Additional Information section.

- 11) **Implementing Agency Roles:** Identify the Implementing Agency for each phase of the project. Click “Save Draft” at the bottom right corner of the screen. As mentioned before, the options for implementing agencies are limited to the one selected on the General Info tab. All implementing agencies selected on general information tab must be assigned a phase on this page.

ePPR ID Version Project Title
 ePPR CT 2025-0009 0 SB1 Cycle 5 Sample

District EA Project ID PPNIO MPO ID County
 01 00000 000000000 1234 VAR

Implementing Agency Roles Fields marked with * are required

Implementing Agency for PA&ED* Caltrans HQ

Implementing Agency for PS&E* Caltrans HQ

Implementing Agency for Right-of-Way* Caltrans HQ

Implementing Agency for Construction* Caltrans HQ

- 12) Legislative Districts:** Select the Legislative Districts (Senate, Assembly, and Congressional) associated with the project location. Click **“Save Draft”** at the bottom right corner of the screen.

PROJECT PROGRAMMING REQUEST						
ePPR ID ePPR CT 2026-0009	Version 0	Project Title SB1 Cycle 5 Sample				
District 01	EA 00000	Project ID 000000000	PPHO 1234	MPO ID	County VIR	
Legislative Districts <small>Fields marked with * are required</small>						
Senate*	Assembly*		Congressional*			
1	2		3			

- 13) Project Milestones:** Enter the proposed schedule (or actual completion) of various project milestones. For **“Document Type”**, select the environmental document being used for the project from the dropdown menu.

There may be projects that don't have all the project delivery phases. Select **Phase Not Applicable** if the phase does not apply to the project.

Click **“Save Draft”** at the bottom right corner of the screen.

PROJECT PROGRAMMING REQUEST						
ePPR ID ePPR CT 2026-0009	Version 0	Project Title SB1 Cycle 5 Sample				
District 01	EA 00000	Project ID 000000000	PPHO 1234	MPO ID	County VIR	
Project Milestones <small>Fields marked with * are required</small>						
Phase	Existing		Proposed			
Existing Project Study Report Approved	08/08/2025					
Begin Environmental (PA&E) Phase *	<input type="checkbox"/> PA&E Phase Not Applicable		09/09/2025			
Circulate Draft Environmental Document	Document Type: <input type="text" value="EIR"/>		10/10/2025			
Draft Project Report *			11/11/2025			
End Environmental (PA&E) Phase *			12/12/2025			
Begin Design (PS&E) Phase *	<input type="checkbox"/> PS&E Phase Not Applicable		01/01/2026			
End Design Phase (RTL for Advertisement Milestone) *			02/02/2026			
Begin Right of Way Phase *	<input type="checkbox"/> Right of Way Phase Not Applicable		03/03/2026			
End Right of Way Phase (Right of Way Certification Milestone) *			04/04/2026			
Begin Construction Phase (Contract Award Milestone) *	<input type="checkbox"/> Construction Phase Not Applicable		05/05/2026			
End Construction Phase (Construction Contract Acceptance Milestone) *			06/06/2026			
Begin Closeout Phase *	<input type="checkbox"/> Closeout Phase Not Applicable		07/07/2026			
End Closeout Phase (Closeout Report) *			08/08/2026			

- 14) **Purpose and Need:** Provide a brief purpose and explanation of the need for the project. If additional space is needed, continue the Purpose and Need in the Additional Information. Please select items from the dropdown menus (all fields are required). Click **“Save Draft”** at the bottom right corner of the screen.

Project Purpose and Need Fields marked with * are required

Purpose and Need Statement *

Brief purpose and explanation of the need for the project.

NHS Improvement * ? Yes

Reversible Lane Analysis * ? Yes

Reduce Greenhouse Gas Emissions * ? Yes

Roadway Class * ? 2

Sustainable Communities Strategy Goals * ? Yes

- 15) **Category and Outputs:** Add all the output that the project component will accomplish. Make sure outputs are consistent with Project report, cost estimates and other supporting documents. Use Category and Output related to the infrastructure benefit that is provided by the project and fill in the total field. Then click **“Add Output”**.

Category and Outputs Information Fields marked with * are required

Category * Output *

Bridge / Tunnel New interchanges Add Output

Delete	Category	Output	Unit	Total
Delete				

Enter the quantity for each output in the **“Total”** column. To add another output, repeat the process listed above (select category and output; click **“Add Output”**; enter **“Total”**).

Category and Outputs Information Fields marked with * are required

Category * Output *

Add Output

Delete	Category	Output	Unit	Total
<input type="checkbox"/>	Bridge / Tunnel	New interchanges	SQFT	1

Delete

If there is any explanation about assumptions and limitations of the outputs value, please add the relevant information in the Additional Information Tab. Click **“Save Draft”** at the bottom right corner of the screen.

- 16) **Performance Indicators and Measures:** All 'required' performance measures for the fund type selected on the general information tab will be populated on this tab. Click on "Select Additional Measures" to expand the drop-down. To add Benefit, select Measure and the relevant indicator from the drop-down menu and click on 'Add Benefit'.

An ePPR created from an already programmed project, may not show all the required performance measures. Additional performance measures may be added individually or through program selection. On the Program dropdown, select the corresponding Program for the project. Click on "Add Program Benefits" and all required performance measure for the program will be added.

If the project does not contribute to a 'required' performance and measure, please add 'zero' in the value columns. Zero = Not Applicable.

If there is any explanation about assumptions and limitations of the Performance Indicators value, please add the relevant information in the Additional Information Tab.

The screenshot displays the 'Performance Indicators and Measures' section of the ePPR system. At the top, there is a header with fields for ePPR ID (ePPR CT 2026-0009), Version (0), Project Title (SB2 Cycle 3 Sample), District (01), EA (00000), Project ID (000000000), PPND (1234), MPO ID, and County (VAR). Below this, the 'Performance Indicators and Measures' section is active, with a note that fields marked with an asterisk are required. The 'Additional Measures (optional) ?' section contains a dropdown for 'Measure' (System Reliability (Freight)) and a dropdown for 'Indicator' (Daily Vehicle Hours of Travel Time Reduction), with an 'Add Benefit' button. The 'Add Program Benefits ?' section contains a dropdown for 'Program' and an 'Add Program Benefits' button. Below the form is a table with columns: Delete, Measure, Indicator, Unit, Build Total, Future No Build Total, and Change.

- 17) **Additional Information:** Use this section for overflow of information from previous tabs and to communicate any assumptions or restrictions about the project data or the ePPR module validation restriction so we can be aware of it.

If there is no information to be shared, please check 'No Comments'. Click "Save Draft" at the bottom right corner of the screen.

The screenshot displays the 'Additional Information' section of the ePPR system. At the top, there is a header with fields for ePPR ID (ePPR CT 2026-0009), Version (0), Project Title (SB2 Cycle 3 Sample), District (01), EA (00000), Project ID (000000000), PPND (1234), MPO ID, and County (VAR). Below this, the 'Additional Information' section is active, with a 'No Comments' checkbox and a large text area for 'Additional Information'. On the right side, there is a sidebar titled 'Sections (Not Saved)' with a list of sections: General Info, Project Header, Scope and Location, Implementing Agency Roles, Legislative Districts, Project Milestones, Purpose and Need, Category and Outputs, Performance Indicators and Measures, Additional Information (highlighted), Proposed Funding Plan, and Review/Print. At the bottom right, there is a 'Save Draft' button.

18) **Proposed Funding Plan:** The Funding portion of the Project Programming Request provides a detailed view of the proposed project programming. Each funding source is broken down by phase. All programmed component amounts must be escalated to the appropriate fiscal year and rounded to thousands.

The SB1 Cycle 5 Program (TCEP/SCCP/LPP-C) will provide two years of programming under the 2026 Program, covering fiscal years 2027-28 (FY 27-28) and 2028-29 (FY28-29).

Click “Add a Funding Source” – either the blue link or the green button (bottom left corner).

Then Click the “Add Funding Amount”. Enter FY (YY/YY) and funding amounts (per \$1000) for the phases in the FY when SB1 funds are being requested.

Click the green floppy disk icon (under “Actions”) to save. Repeat this step until you have added all the funds for the project.

Click the green “Save” button at the bottom of the Sections pane to save the information on the Proposed Funding tab.

The entire Proposed Funding Plan should now be listed as shown in the screenshot below.

- 19) **Review/Print:** Ensure that each section is complete, with “NO ERRORS” and a green checkmark (No Error indicator). If there is an error, a black exclamation mark will appear next to the section, along with a red description of the error. Please remedy errors as necessary, until all sections have the green checkmark.

The Button ‘Save as Final’ will appear on the review Tab when there is a green check (No Error) indicator next to all tabs.

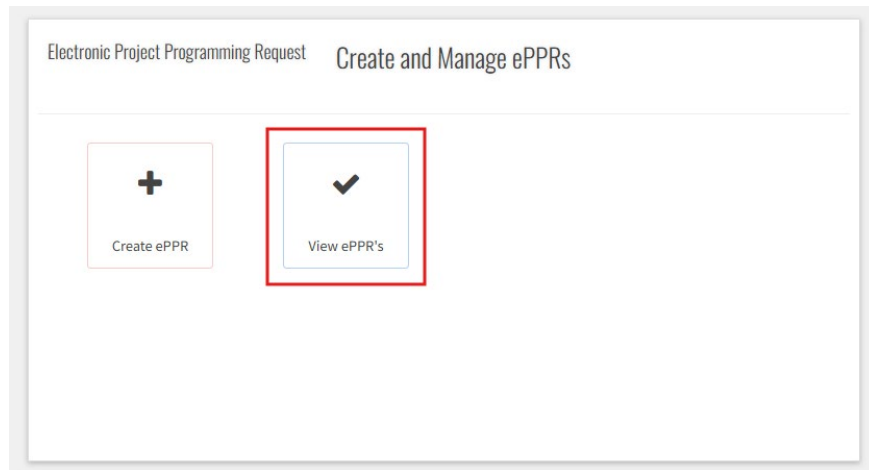
DO NOT SAVE AS FINAL if you want to review and make any changes to the ePPR later.

You may print the ePPR at any point to generate a pdf (with draft watermark) that can be shared for review and comments.

To finalize the ePPR, click “Save as Final” and generate a Print pdf without “draft watermark”. All final ePPR submissions should be finalized to allow for CTC to take action.

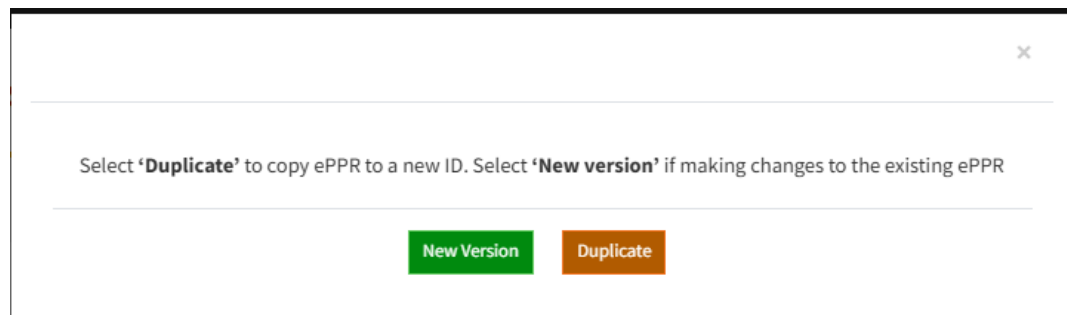
If edits/updates need to be made to a finalized ePPR before a deadline, click on the “Copy” icon and create a **New Version**, make edits, and save as final. Make sure to submit the most updated/relevant ePPR with the application.

- 20) To edit the Draft ePPR before it is 'Saved as Final', click on the ePPR ID in the 'View ePPR' list. Do not click copy/ duplicate the ePPR, in order to edit it.



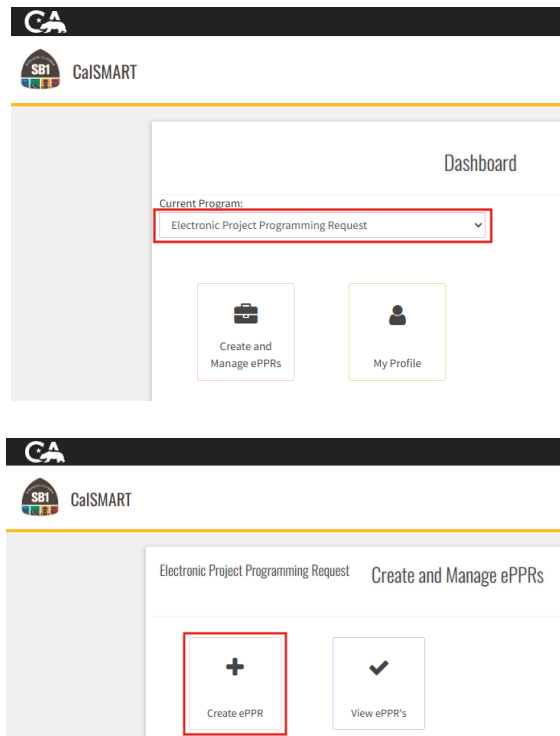
ePPR ID	Version	PPR FY	Project Title	Last Edited By	Creating Agency	MPO	ePPR Status	Copy	Delete
ePPR CT-2025-0009	0	2026	SBI Cycle 5 Sample	abraham.santos@dot.ca.gov	Caltrans HQ	NOH-MPO	Draft		
ePPR CT-2025-0010	1	2025	Vehicle Emissions Program Update	abraham.santos@dot.ca.gov	Caltrans HQ	NOH-MPO	Final		
ePPR CT-2025-0011	1	2025	Program of Six Transportation Issues	abraham.santos@dot.ca.gov	Caltrans HQ	NOH-MPO	Final		
ePPR CT-2025-0012	1	2025	ADAPTS Plan	abraham.santos@dot.ca.gov	Caltrans HQ	NOH-MPO	Final		
ePPR CT-2025-0013	1	2025	How to Use Funding to Improve and Enhance Park Access and Connectivity ePPR List	abraham.santos@dot.ca.gov	Caltrans HQ	NOH-MPO	Final		
ePPR CT-2025-0014	1	2025	San Joaquin Hills Transportation, Access, and Safety Program ePPR List	abraham.santos@dot.ca.gov	Caltrans HQ	NOH-MPO	Final		
ePPR CT-2025-0015	1	2025	Planning, Programming and Monitoring	abraham.santos@dot.ca.gov	Caltrans HQ	NOH-MPO	Final		
ePPR CT-2025-0016	1	2025	Planning, Programming and Monitoring	abraham.santos@dot.ca.gov	Caltrans HQ	NOH-MPO	Final		
ePPR CT-2025-0017	1	2025	Planning, Programming and Monitoring	abraham.santos@dot.ca.gov	Caltrans HQ	NOH-MPO	Final		
ePPR CT-2025-0018	1	2025	Planning, Programming and Monitoring	abraham.santos@dot.ca.gov	Caltrans HQ	NOH-MPO	Final		
ePPR CT-2025-0019	1	2025	Planning, Programming and Monitoring	abraham.santos@dot.ca.gov	Caltrans HQ	NOH-MPO	Final		

- 21) If edits/ updates must be made to a finalized ePPR before the application deadline, click on the 'Copy' icon, and create a new version, make edits, and save as Final. Make sure to submit the most updated / relevant ePPR with the application.

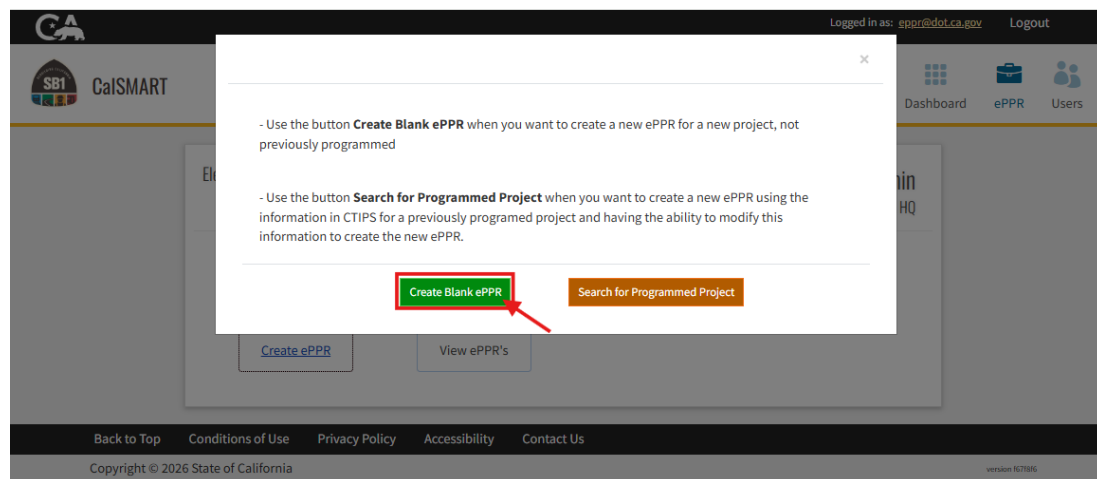


II. Creating ePPR on CalSMART for new Projects

- 22) Sign in to ePPR module and select Electronic Project Programming Request under the Current Program drop down then click on Create ePPR



- 23) Click on “Create Blank ePPR”.



- 24) **General Info:** Please provide the required information (required fields are marked with an asterisk).
- Select '**Program**' from the Program dropdown
 - Fill out all other required* fields and click 'Save Draft' in the Sections panel on the right to save draft. This step is required to save initial draft that can be edited at a later time.
 - The implementing agencies selected on this page will appear as the only options on the implementing agency tab, so make sure all required agencies are listed here.
 - If you'd like to share this ePPR for review while you are working on it, please add the regional agency in the co-nominating agency so that they will be able to view it.
 - Click 'Save Draft' at the bottom right on the Sections panel. At this point, the draft ePPR can be printed as pdf to send for reviews and comments.

The screenshot shows the 'CREATE PROJECT PROGRAMMING REQUEST' form, specifically the 'General Information' tab. The form includes the following fields:

- Project Title***: A text input field.
- MPO***: A dropdown menu currently set to 'NON-MPO'.
- Program***: A dropdown menu with a search filter 'Type to filter list'. The options listed are:
 - STIP
 - OTHER
 - LPPF
 - TCEP
 - SCCP
 - LPPC
 The 'TCEP' option is highlighted with a red box.
- Co-Nominating Agency(s) (type to filter list) ?**: A text input field.

- 25) Go through all the tabs listed in the Sections area on right and fill out all required* fields on each tab. After verifying the information is accurate for that tab, **click 'Save Draft'** before working on another tab. For additional information about data fields on each tab besides the ones listed below, please refer to the [ePPR User's Guide](#).

The screenshot shows the 'Sections' panel on the right side of the form. It contains a list of tabs for navigating between different sections of the request:

- General Info (highlighted)
- Project Header
- Scope and Location
- Implementing Agency Roles
- Legislative Districts
- Project Milestones
- Purpose and Need
- Category and Outputs
- Performance Indicators and Measures
- Additional Information
- Proposed Funding Plan
- Review/Print

At the bottom of the panel is a green button labeled 'Save Draft'.

26) Follow Steps [7](#) through 19, as mentioned above in the previous sections for more details about completing the individual tabs.

For additional information about data fields on each tab besides the ones listed, please refer to the [ePPR User's Guide](#).

Please email at ePPR@dot.ca.gov or contact the program coordinator if you have any questions or need help.