

CalSMART “Other SB1 Funded Programs” Tool Tips

Cell	Screen	Field/Cell	Tool Tips
A1	General Info	Report ID	System-generated unique report identifier.
A2	General Info	Agency	Name of agency preparing and submitting the progress report.
A3	General Info	Period	Begin and end dates of the reporting period for which the progress report is being prepared.
A4	General Info	Prepared By	Name of person preparing the progress report.
A5	General Info	Contact	Name of contact person for the project (typically the project manager).
A6	General Info	Contact Title	Title of contact person for the project (typically the project manager).
A7	General Info	Contact Phone	Phone number of contact person for the project (typically the project manager).
A8	General Info	Contact Email Address	Email address of contact person for the project (typically the project manager).
A9	General Info	Project ID	Caltrans-assigned 10-digit Project ID used in Caltrans’ accounting system. Also known as EFIS ID within Caltrans.
A10	General Info	Title	Project title as programmed by the CTC.
A11	General Info	District	Caltrans District number.
A12	General Info	EA	Expenditure Authorization, another identifier used by Caltrans.
A13	General Info	PPNO	Project Programming Number as programmed by the CTC.
A14	General Info	PA&ED Implementing Agency	Name of agency responsible for implementing the Project Approval and Environmental Document phase. This is the phase during which alternatives are evaluated, the preferred alternative is selected, and the environmental document (and Project Report for state highway projects) is signed.
A15	General Info	PS&E Implementing Agency	Name of agency responsible for implementing the Plans, Specifications and Estimate phase. This is the phase during which design is completed and constraints (such as permits and agreements) are cleared.
A16	General Info	Right of Way Implementing Agency	Name of agency responsible for implementing the Right of Way phase. This is the phase during which right of way is acquired and utilities are relocated.
A17	General Info	Construction Implementing Agency	Name of agency responsible for implementing the Construction phase. This is the phase during which construction occurs.
A18	General Info	County	County where the project lies, as programmed by the CTC.
A19	General Info	Route	State highway on which the project will be constructed. Not applicable for local roads, rail and mass transit projects.
A20	General Info	PM Back	Begin postmile limit, as programmed by the CTC. Not applicable for local roads, rail and mass transit projects.

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A21	General Info	PM Ahead	End postmile limit, as programmed by the CTC. Not applicable for local roads, rail and mass transit projects.
A22	General Info	Approved Project Description	Approved project description, as programmed by the CTC.
A23	General Info	Approved Project Scope	Approved project scope, as programmed by the CTC.
A24	General Info	Approved Project Benefits	Approved project benefits, as programmed by the CTC. Not applicable for SHOPP projects.
B1	Milestones	Milestone	Project milestones, indicating the completion of a set of tasks.
B2	Milestones	Approved Completion Date	Completion dates as approved by the CTC. From the baseline agreement if a baseline agreement has been approved. Otherwise from the project application for SCCP, TCEP, LPP, and ATP projects, and from the latest adopted SHOPP for SHOPP projects.
B3	Milestones	Planned Completion Date	Planned dates from the current project schedule.
B4	Milestones	Actual Completion Date	Actual dates for completed milestones.
B5	Milestones	Baseline Agreement	Baseline agreements are required for all SCCP and TCEP projects, many SHOPP projects, and some LPP and ATP projects. The baseline agreement establishes the approved scope, cost, schedule and benefits (outputs/outcomes) of a project.
B6	Milestones	Not Required	Check this box if a baseline agreement is not required for this project.
B7	Milestones	PA&ED	Project Approval and Environmental Document milestone. The milestone at which the preferred alternative has been selected and the environmental document and Project Report for state highway projects) has been signed.
B8	Milestones	ROW Cert	Right of Way Certification milestone. The milestone at which all Right of Way constraints (land acquired, rights of entry, utilities relocated, etc.) have been cleared.
B9	Milestones	Ready to List	Ready to List milestone. The milestone at which design is complete and all constraints (permits, agreements, right of way) have been cleared. This milestone must be achieved prior to requesting a CTC allocation.
B10	Milestones	Begin Construction	Begin Construction milestone. For local agency projects, the milestone at which the construction contract has been awarded to a contractor. For Caltrans projects, the milestone at which the construction contract has been executed.
B11	Milestones	End Construction	End Construction milestone. The milestone at which construction is complete and the facility's owner has accepted the contractor's work.

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B12	Milestones	Completion Report	Completion Report milestone. The milestone at which the implementing agency has submitted the SB1 Completion Report to Caltrans and Caltrans has approved the report. Completion Reports are due within six months of the End Construction milestone.
B13	Milestones	Final Delivery Report	Final Delivery Report milestone. The milestone at which the implementing agency has submitted the SB1 Final Delivery Report to Caltrans and Caltrans has approved the report. Final Delivery Reports are due within six months of final expenditures.
C1	Time Extensions	Phase	A phase is a distinct set of tasks leading to achievement of a major milestone.
C2	Time Extensions	Allocation	Allocation time extensions are required when a phase cannot be allocated by the CTC by the approved deadline. Input any CTC-approved allocation time extensions in months.
C3	Time Extensions	Award	Award time extensions are required when the construction contract cannot be awarded to a contractor within six months of the CTC allocation. Input the CTC-approved award time extension in months.
C4	Time Extensions	Expenditure	Expenditure time extensions are required when expenditures will continue beyond three years (or other CTC-approved duration) from the allocation date. Input any CTC-approved expenditure time extensions in months.
C5	Time Extensions	PA&ED	The Project Approval and Environmental Document phase. This is the phase during which alternatives are evaluated, the preferred alternative is selected, and the environmental document is signed.
C6	Time Extensions	RW Support	The Plans, Specifications and Estimate phase. This is the phase during which design is completed and constraints (such as permits and agreements) are cleared.
C7	Time Extensions	PS&E	The Right of Way phase. This is the phase during which right of way is acquired and utilities are relocated.
C8	Time Extensions	Const Support	The Construction phase. This is the phase during which construction occurs.
D1	Funding	Phase	A phase is a distinct set of tasks leading to achievement of a major milestone.
D2	Funding	Approved Project Funding	The total funding committed to each phase of the project.
D3	Funding	SHOPP	State Highway Operations and Protection Program (SHOPP) funding committed to each phase of the project.

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D4	Funding	LPP Comp	Local Partnership Program (LPP) Competitive funding committed to each phase of the project.
D5	Funding	LPP Form	Local Partnership Program (LPP) Formula funding committed to each phase of the project.
D6	Funding	SCCP	Solutions for Congested Corridors (SCCP) funding committed to each phase of the project.
D7	Funding	TCEP	Trade Corridor Enhancement Program (TCEP) funding committed to each phase of the project.
D8	Funding	ATP	Active Transportation Program (ATP) funding committed to each phase of the project.
D9	Funding	State	Other State funding committed to each phase of the project, such as STIP (RIP, IIP), TCRP, and Proposition 1B (CMIA, SR99, TCIF, SLPP, etc.).
D10	Funding	Federal	Other Federal funding committed to each phase of the project.
D11	Funding	Local and Private	Other Local and Private funding committed to each phase of the project.
D12	Funding	PA&ED	The Project Approval and Environmental Document phase. This is the phase during which alternatives are evaluated, the preferred alternative is selected, and the environmental document is signed.
D13	Funding	PS&E	The Plans, Specifications and Estimate phase. This is the phase during which design is completed and constraints (such as permits and agreements) are cleared.
D14	Funding	RW Support	The support portion of the Right of Way phase. This is the phase during which right of way is acquired and utilities are relocated. Not applicable for locally-implemented projects.
D15	Funding	Const Support	The support portion of the Construction phase. This is the phase during which construction occurs. Not applicable for locally-implemented phases.
D16	Funding	RW Capital	The capital portion of the Right of Way phase. This is the phase during which right of way is acquired and utilities are relocated.
D17	Funding	Const Capital	The capital portion of the Construction phase. This is the phase during which construction occurs.
D18	Funding	Award Amount	The construction contract award amount. This includes the bid amount, any State-furnished or locally-furnished materials, any supplemental work, and contingencies. Also known as contract “allotment” at Caltrans.
E1	Expenditures	Phase	A phase is a distinct set of tasks leading to achievement of a major milestone.

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E2	Expenditures	Total	The total expenditures for each phase of the project.
E3	Expenditures	SHOPP	State Highway Operations and Protection Program (SHOPP) expenditures for each phase of the project.
E4	Expenditures	LPP Comp	Local Partnership Program (LPP) Competitive expenditures for each phase of the project.
E5	Expenditures	LPP Form	Local Partnership Program (LPP) Formula expenditures for each phase of the project.
E6	Expenditures	SCCP	Solutions for Congested Corridors (SCCP) expenditures for each phase of the project.
E7	Expenditures	TCEP	Trade Corridor Enhancement Program (TCEP) expenditures for each phase of the project.
E8	Expenditures	ATP	Active Transportation Program (ATP) expenditures for each phase of the project.
E9	Expenditures	State	Other State expenditures for each phase of the project, such as STIP (RIP, IIP), TCRP, and Proposition 1B (CMIA, SR99, TCIF, SLPP, etc.).
E10	Expenditures	Federal	Other Federal expenditures for each phase of the project.
E11	Expenditures	Local & Private	Other Local and Private expenditures for each phase of the project.
E12	Expenditures	Additional Local	Input any additional local agency expenditures of local agency funds not already accounted for in the other columns on this screen.
E13	Expenditures	Planned Expenditure at Completion	The anticipated final cost of each phase. It is comprised of expenditures to date plus planned expenditures to complete each phase.
E14	Expenditures	PA&ED	The Project Approval and Environmental Document phase. This is the phase during which alternatives are evaluated, the preferred alternative is selected, and the environmental document is signed.
E15	Expenditures	PS&E	The Plans, Specifications and Estimate phase. This is the phase during which design is completed and constraints (such as permits and agreements) are cleared.
E16	Expenditures	RW Support	The support portion of the Right of Way phase. This is the phase during which right of way is acquired and utilities are relocated. Not applicable for locally-implemented projects.
E17	Expenditures	Const Support	The support portion of the Construction phase. This is the phase during which construction occurs. Not applicable for locally-implemented phases.

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E18	Expenditures	RW Capital	The capital portion of the Right of Way phase. This is the phase during which right of way is acquired and utilities are relocated.
E19	Expenditures	Const Capital	The capital portion of the Construction phase. This is the phase during which construction occurs.
F1	Outcomes & Outputs	Output	The type of output to be achieved by the project.
F2	Outcomes & Outputs	Approved	The approved quantity of outputs to be achieved by the project, as approved by the CTC.
F3	Outcomes & Outputs	Current	The current quantity of outputs to be achieved by the project, as proposed by the implementing agency.
F4	Outcomes & Outputs	Units	The unit of measure for the outputs to be achieved by the project.
G1	Corrective Action Plan	Cost	A summary describing the reason for any cost change and the corrective action plan to manage any risk to the implementation of the project as programmed.
G2	Corrective Action Plan	Schedule	A summary describing the reason for any schedule change and the corrective action plan to manage any risk to the implementation of the project as programmed.
G3	Corrective Action Plan	Scope	A summary describing the reason for any scope change and the corrective action plan to manage any risk to the implementation of the project as programmed.
G4	Corrective Action Plan	Benefits	A summary describing the reason for any benefits change and the corrective action plan to manage any risk to the implementation of the project as programmed.
G5	Corrective Action Plan	CTC Action Request Date	The planned date that the implementing agency will submit a request for CTC action to address a scope, cost, schedule or benefits change. This could be an actual date if the request has already been submitted.