SB1 Programs
Project Intake Tool
April 2, 2018
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Local Streets and Roads Program
SB1 Programs Project Intake Tool

https://sb1intaketool.dot.ca.gov/login/auth
Login and Registration

Follow Password Requirements
Hi alicia,

You (or someone claiming to be you) have completed the first step in creating an SB 1 Programs Project Intake Tool account with this email address.

If you made the request, please click here to continue the registration process.

Please note, DO NOT attempt to login until you have received an “Account Approved” email from us. Attempting to login before you receive this email could lock your account. If you have any questions as to the status of your account approval please email LSR@catc.ca.gov

This step simply verifies the email used to create the account, it does not authorize the use of the account. You will receive an additional email authorizing your “user” account, this will be when you can login for the first time.
Once you have received the following email click “here” to verify your email and log into your account.

Hi Alicia,

Your SB1 Programs Project Intake Tool account has been approved. Click [here](https://sb1intaketool.dot.ca.gov/login/auth) to login.

If the embedded link in the email doesn’t redirect you to the login page, please follow the link below.

[https://sb1intaketool.dot.ca.gov/login/auth](https://sb1intaketool.dot.ca.gov/login/auth)
If you are establishing the first “Submittal Package” for your city/county, select “Create Submittal”. The “New Project Submittal” form will then appear, this form will be used to establish agency contact information (only one agency submittal can be made each FY).

Tips for filling out the “New Project Submittal” Form:

- All fields with an * are required.
- Ensure the “Funding for Fiscal Year” section is reflecting the correct year your submittal is for.
- Submittal Title, Agency Name, LoCode, & State are auto populated fields.

If the Form Above Doesn’t Appear Please go to Slide 8 For Special Instructions.
Must include average PCI if it is 80 or above and the City/County will be funding other transportation priorities.

Explain how RMRA Projects were identified, priorities set, and how they meet the Local Streets and Roads criteria as defined in the guidelines.

Don’t Forget to Upload File

Reminder, “New Project Submittal” establishes your overall package not a specific project.

Click on a “?” and it will open a detailed explanation.
Select “Create Submittal” on the dashboard, only one agency submittal can be made each FY. If a submittal has already been started or submitted for review the following message will appear.

If your city or county has already created a package within the system and you receive this message, please click “here”. This will take you directly to your submittals page where you can add projects to the package. If your city or county has already submitted the package for review, please contact CTC immediately. If CTC has not “accepted” the submittal at that time, CTC will then be able to return the package to you and you will be able to add more projects.
Adding Projects to a Saved Submittal After a Package is Created

A submittal must reflect this symbol in order to ensure you can add projects for your city or county. You will not have this option once it is submitted for review.

You can add projects to any submittal prior to selecting “submit for review”.

As a reminder, it is imperative all parties who have a role in submitting or adding projects to the final submittal verify it is complete prior to selecting “Submit for Review”. Remember to select “Save and Next” after completing each project, this will save all of your information and allow you to revisit and make changes prior to submitting.
Cities and Counties must consider these project elements, to the extent that they are cost-effective and feasible. Please select and describe any that apply.

Select “Save and Continue” to save the information as you are entering it and before moving to the next page. Once you select save a clean form will then appear.

Select “Save and Duplicate” to save the information entered and replicate another form prefilled for an additional project. This is ideal when you are submitting similar projects. (see next slide)

Select “Cancel” to clear your entry and remove from your project list. “Cancel” can also be used once your project entry has been completed and saved. The is equivalent “finish” button (see slide 10).
Selecting “Save and Duplicate”

Fields That Remain Filled:

- Project Type
- Project Title
- Project Description
- Project ID
- Legislative Districts
- Project Location
- Estimated Completion Date
- Estimated Total Project Cost
- Additional Project Elements

Fields That Need Re-Entering:

- Project Type
- Project Title
- Project Description
- Project ID
- Legislative Districts
- Project Location
- Estimated Completion Date
- Estimated Total Project Cost
- Description of Elements

*This is ideal for general paving/resurfacing projects that will be taking place around the same time and have the majority of the same elements.*
Selecting Cancel

Alphabet Soup Lane

Estimated Completion Date

- Pre-Construction: 08/2019
- Construction: 10/2019

Estimated Useful Life

Message from webpage: Date entered on this page will not be saved! Are you sure?

- OK
- Cancel

Additional Project Elements?
- Sustainability
- Climate Change
- Technologies
- Complete Streets

Estimated Total Project Cost

Save and Continue  Save and Duplicate  Cancel
A submittal must reflect this symbol in order to ensure you can add projects for your city or county. You will not have this option once it is submitted for review.

Add and update earlier documents uploaded if needed.

You can add projects to any submittal prior to selecting “submit for review”.

As a reminder, it is imperative all parties who have a role in submitting or adding projects to the final submittal verify it is complete prior to selecting “Submit for Review”. Remember to select “Save and Continue” after completing each project, this will save all of your information and allow you to revisit and make changes prior to submitting.
Select “Manage Submittals” on the Dashboard to View Projects Submitted to CTC for Review and Those Pending Submission.

Add additional projects to your package prior to submitting to CTC for review. It is imperative your city or county ensure a complete package (project list and supporting documentation), are compiled prior to submitting for review to CTC.
Before Submitting

Verify this is a complete package with all necessary supporting documents and full project lists prior to selecting “Yes”.
### Submittal Screen and Confirmation

**Message from webpage**

Projects submitted successfully

**Projects**

<table>
<thead>
<tr>
<th>ID</th>
<th>Title</th>
<th>Description</th>
<th>Location</th>
<th>Estimated Completion</th>
<th>Useful Life</th>
</tr>
</thead>
<tbody>
<tr>
<td>PP001</td>
<td>Test Project 1</td>
<td>Test Description Project</td>
<td>test location description</td>
<td>08/2018 - 08/2019</td>
<td>50 - 50</td>
</tr>
<tr>
<td>PP002</td>
<td>Test</td>
<td>test</td>
<td>zulufluff</td>
<td>08/2020 - 08/2020</td>
<td>5 - 10</td>
</tr>
</tbody>
</table>

**Legend**

- Project Submitted and Pending CTC Approval
SB1 Programs Project Intake Tool <no-reply@dot.ca.gov>

To:

Thank you for your SB1 Local Streets and Roads Funding Proposed Project List Submittal, it has been received. If staff has any questions or needs additional information, someone will contact you.

If you need to contact program staff please send an email to lsr@ctc.ca.gov

Once you have successfully submitted your project lists to CTC for review, you will receive a confirmation of receipt email for your records. Please note, this email will only go to the email on file as the contact for the “Agency” when setting up the accounts. If you submitted and did not receive an email, please select the “Contact Us” tab on the dashboard to notify us.
Your SB 1 Local Streets and Roads Program Funding Proposed Project List Submittal was returned by CTC for the following reason(s):

**Incomplete Submittal** A detailed explanation will be provided by CTC staff as to why the submittal was returned.

Please make any necessary corrections and resubmit. If you need assistance please contact program staff at lsr@ctc.ca.gov.

Thank you

Should you receive an email with “SB1 Project Proposal Returned” in the subject line, please note you will be asked to clarify or fix any of the areas or items identified in the email and resubmit within the designated timeline.
Select “View Projects” to view Status, Details, and Access the Export List with Project Specifics. Ideal for Posting On-Line and Presenting at Board/Council Meetings.

Run an excel report of all submittals, it will include project specifics, status and all relevant dates.
Verification of Submittal Acceptance

Go to the “View Submittals” tab on your Dashboard to easily view project details and status on one page.
Should you have any questions or run into any issues with the tool, please select the “Contact Us” tab at the bottom of your Dashboard. An email will populate for CTC, please include as much detail as possible so we may best assist you.
Thank You

More Information

Email: LSR@catc.ca.gov
Alicia.Sequeira@catc.ca.gov
Laura.Pennebaker@catc.ca.gov

CTC-LSR Program Website:
http://catc.ca.gov/programs/sb1/lsrp/