



2025 OCFundtracker Tutorial and Amendment Guide

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Introduction

The Federal Transportation Improvement Program (FTIP/TIP) is the primary programming and implementation process for projects identified in the Regional Transportation Plan (RTP).

The Southern California Association of Governments (SCAG) prepares the RTP, a 30-year Long Range Plan that models projects for conformity with the Federal Clean Air Act. The plan emphasizes needs and improvements in the transportation system in the greater Southern California area such as goods movements, management, and financing.

The TIP covers a minimum of four years with updates every two years and is amended periodically to reflect changes in funding, scope, or schedule.

Status and information on the FTIP are available on the SCAG website:

<http://ftip.scag.ca.gov/Pages/default.aspx>

Electronic copies of the adopted SCAG 2025 FTIP Guidelines and additional information are available on the OCTA FTIP webpage as well.

[Federal Transportation Improvement Program - Orange County Transportation Authority \(octa.net\)](#)

OCFundtracker

OCFundtracker is Orange County's TIP management system. Produced in January 2009 with an updated system released in August 2019, OCFundtracker offers a comprehensive project and programming system that can be accessed via the internet. This guide explains each variable required for project submittal or amendments.

To access the OCFundtracker, please request a log in account at:

<https://OCFundtracker.octa.net/secure/login.asp>

Tutorials are offered in the OCFundtracker and can be accessed on the main menu. Please address questions or comments to Ben Ku at 714-560-5473 (bku@octa.net) or Mina Kim at 714-560-5705 (mkim@octa.net).

Administrative Modifications and Formal Amendments

An administrative modification is a minor change to the FTIP that does not require a process like a public review or federal approval, but do require SCAG approval. An example of an administrative modification would be changing the lead agency on a project. On the other hand, a Formal Amendment is a revision that involves a major change to the FTIP, such as the addition or deletion of a project, a major change in project cost or project scope.

Additionally, projects in the FTIP are required to be fully funded. This means that the FTIP sheet includes only approved funds for which back-up documentation can be provided, not funds that are tentative or proposed. FTIP programming is required for the Authorization to Proceed process and for CTC allocation approval.

Roles and Responsibilities

The 3 main groups that participate in the FTIP process are the local agencies, OCTA, and SCAG.

- Local agencies are responsible for submitting and updating projects in the FTIP, ensuring compliance with FTIP guidelines and TCM requirements, ensuring that projects are fully funded, and providing documentation authorizing funding for projects.
- OCTA is responsible for administering the FTIP at the county-level, as well as reviewing projects submitted by local agencies before they are submitted to SCAG for approval. OCTA also administers FTIP submittals for grouped project listings.

SCAG is responsible for maintaining the regional FTIP database. SCAG then reviews the projects to ensure compliance and prepare the submittal for review by the Federal Highway Administration (FHWA) and the Federal Transit Administration (FTA).

Creating a New User Account

Step 1 – Access the OCFundtracker Webpage

- Direct your browser to: <https://OCFundtracker.octa.net/secure/login.asp>
- Click the “Click Here” link located under the orange “Login” button as seen below.



Step 2 – Creating a New User


- Enter your email address, answer the Captcha image that is shown, and click "Submit" as seen below.

OCTA ACCOUNT SIGNUP / PASSWORD RESET

PLEASE ENTER YOUR EMAIL ADDRESS BELOW. IF A USER ACCOUNT ALREADY EXISTS WITH THIS EMAIL ADDRESS, A PASSWORD RESET LINK WILL BE EMAILED TO YOU.

EMAIL ADDRESS

☐ I'm not a robot


reCAPTCHA
[Privacy](#) - [Terms](#)

Submit

Step 3 – Fill out User Registration Form

- Complete the user registration form as seen below. Note that the password is case sensitive while the username is not. Please fill this information out as thoroughly as possible; it is important for OCTA staff to contact users during the TIP process.

OCFUNDTRACKER - NEW USER

PASSWORD REQUIREMENTS:

- Must be at least 7 characters in length
- Cannot be a word that is found in the dictionary
- Cannot contain your username
- Cannot contain the word "OCTA"
- Cannot be on the list of commonly used internet passwords
- Cannot contain " " ; *

USERNAME
test@octa.net

PASSWORD

RE-TYPE PASSWORD

NAME

EMAIL ADDRESS
test@octa.net

PHONE NUMBER

AGENCY NAME

Please answer the following question(s) to determine your access level:

Are you responsible for amending projects in the FTIP?

Are you responsible for submitting project amendments for CTC review?

USER TYPE
CTC

Submit New User Information

Step 4 – Level of Access

- Your responses to the Yes/No questions and User Type determine your level of access. User Types are described as follows:
 - READONLY** – User can view projects for the selected MPO but cannot make changes.
 - SPONSOR** – User can view projects for the selected Lead Agencies or MPO and submit changes for review by the MPO. Local Agencies should choose this option.
 - OCTA** – User can view/edit projects and accept/deny requests from SPONSOR users.
 - STATE Approval of TIP** – User can view projects associated with TIPs pending State review and approve TIP documents.
- Make sure you hold onto your username and password information. You will need this every time you log in. If you forget your password, you can reset it by clicking the same “Click Here” link in Step 1 and following the password reset instructions.

Step 5 – Approval Email

Once you have submitted your request, OCTA staff will review and approve or deny access to the OCFundtracker. If approved, you will receive an e-mail noting your account approval and you may begin to use the system. *To ensure consistency, please do not share user accounts.*

Home Page

Note: For local agencies, the home page of the OCFundtracker may look slightly different because of differences in levels of access.

Here is what the home page of the OCFundtracker looks like. Whenever you need to get to the home page, you can click the OCTA logo in the upper left corner of the page.

The screenshot shows the OCFundtracker Home Page. At the top is a dark blue navigation bar with the OCTA logo on the left and links for Project Tools, Reports, Other Tools, and a Search Project ID field. Below the navigation bar is a section titled "NEWS & REFERENCE MATERIALS". A notification banner reads: "New to OCTA OCFUNDTRACKER? View the Tutorials to learn how to use the system. [Dismiss]". The main content area features four summary cards:

In Progress Amendments	In Progress Adoptions
Amend TIP 4 In Progress 0 In Denied	TIP Adoption 0 In Progress 0 Adoptions In Denied
Submitted Amendments	Submitted Adoptions
3 Pending 78 Accepted	0 Pending 0 Accepted

At the bottom, there are three links: CONTACT OCTA, 8.37s, and EMAIL OCFUNDTRACKERHELP@ECOINTERACTIVE.COM.

Upper Bar



Below is a list of all the different buttons and their uses on the home page upper bar.

1. Project Tools
 - a. My Projects List
 - b. Amend TIP Projects
 - c. TIP Adoption
2. Reports
 - a. When you hover over the "Reports" tab, a list of reports will drop down. Select the report you wish to run. The reports listed below are reports OCTA believes will be most helpful to the local agencies, however more reports are available in the system for your reference. Each report allows you to filter and search for specific criteria. Fill out the appropriate fields for the selected report and click "GENERATE REPORT." The report will open in your browser and give you the ability to print or download the report to your computer.
 - i. FTIP Amendment Report: This report automatically creates a PDF listing of projects in amendments specified in the search box. It shows the current project report as well as the previously approved one, if applicable. This includes the report format that is used by OCTA.
 - ii. FTIP Project Report: This report automatically creates a PDF listing of the latest version of projects included in amendments specified in the search box.
3. Other Tools
 - a. All TIP Actions Read-Only
 - b. Change Password
 - c. Help / Tutorials
 - d. Contact Help Desk
 - e. CTFP / WATER / CIP Module Login
4. Icons
 - a. In Progress
 - b. Denied – In Progress
 - c. Submitted to CTC – Project Pending Review
 - d. Accepted by CTC – Pending Amendment/Adoption
5. Search Bar
 - a. Allows users to search for projects using the TIP ID. Advanced allows for more filtered searches.
6. Log Out
 - a. Logs user out of OCFundtracker.

TIP Programming

When adding or updating projects, they must be associated with an open TIP action for review/approval. Choose an open TIP Action below to track the updates or additions you will be entering.

Keep in mind that when entering a project into the FTIP, not all information is necessary or available to the local agencies when creating a new project at time of entry. Project updates or additions must be associated with an open TIP Action for review/approval. **Fields that are required will be marked with a red asterisk** in this guidebook.**

Selecting The Right TIP

- Click the "**Amend TIP**" link (to associate it with an open TIP amendment) or "**TIP Adoption**" link (to associate it with an open TIP adoption) on the main menu.
 - A TIP adoption happens every 2 years and is the start of a new FTIP cycle. A TIP amendment occurs monthly and is either a formal amendment or an administrative modification. TIP amendments make changes to the project list submitted in the initial base TIP adoption.
 - If either of these links is disabled (gray), this means that the MPO has no open amendment or adoption TIPs.

In Progress Amendments Amend TIP ⓘ ← 13 In Progress 📈 0 In Denied by CTC 🚫	or	In Progress Adoptions TIP Adoption ⓘ → 0 In Progress 📈 0 In Denied by CTC 🚫
Submitted Amendments (to CTC) 2 Pending CTC Approval 📄 1 Accepted by CTC ✅		Submitted Adoptions (to CTC) 0 Pending CTC Approval 📄 0 Accepted by CTC ✅

- Click "Create New Project" and choose the appropriate amendment or adoption TIP for your new project as seen below.

TIP <ul style="list-style-type: none"> Amend/modify Project In TIP Create New Project ← Carry Over Project 	TIP <ul style="list-style-type: none"> Create New Project ← Carry Over Projects
---	---

TIP
<p>Project updates or additions must be associated with an open TIP Action for review/approval. Choose an open TIP Action below to track the updates or additions you will be entering:</p> <ul style="list-style-type: none"> [23-16] Administrative - Orange County Transportation Authority (OCTA) [23-17] Formal - Orange County Transportation Authority (OCTA) [23-97] Formal - Orange County Transportation Authority (OCTA)

As mentioned earlier, the Adoption/Amendment field is the TIP cycle and amendment in which the project is being amended or created. There are two types of amendments: Administrative Modification and Formal Amendment.

Administrative Modification – Are minor changes to the project that do not revise the scope of the project and do not exceed \$20 million or 50% of the total project phase or total project cost. Changes such as fund source changes, lead agency changes, project description changes that do not alter the scope of the project and split and combining of projects are examples of administrative changes.

Formal Amendment – Formal amendments are changes that alter the scope, drastic alteration of funding, delays or advances, and deletion or completion of projects. These are large changes to projects.

For example:

23-02-ADMIN

Term	Description
23	2023 TIP cycle
02	2 nd Amendment of the 2023 TIP
ADMIN / FORMAL	Administrative Modification / Formal Amendment

TIP Project ID

A TIP Project ID identifies a project according to County, Year, Amendment created, and Number. Project IDs are solely for OCTA and SCAG use. These numbers are assigned by OCTA during review.

For example:

ORA233301

Term	Description
ORA	Orange County
23	2023 TIP Cycle
33	Created in the 33 rd Amendment of the 2023 TIP
01	Project Number

Within each project there are seven tabs: TIP Programming, Obligation, Map, Project IDS/Contacts, Documents, Amendment History, Performance Metrics.

However, when creating a new project, only the TIP Programming tab will show up before the project is saved for the first time. **After being saved, users can access the other tabs to enter in more information.** Supplemental information can be found in the 2025 FTIP Guidelines by SCAG or in the “References” area of this Guidebook.

Administrative Area

Administrative Area

ADOPTION/AMENDMENT 25-01 FORMAL 2025	GROUP PROJ No	GROUP NAME	TIP ID	CONFORMITY CATEGORY
SCAG MODELING #	CAP INC	REGN SIG	MODE NO	MODELING
COMMITTED FIELDS	CFP	RTP REVIEW	STUDY ONLY	ES FUND CATEGORY
DISTRICT ID	12			

The first part of the FTIP to fill out is the Administrative Area. The adoption/amendment, CTC and Group Project fields will automatically populate based on your selections on the previous screen. If they are incorrect, you may select the correct information by using the drop-down menus.

Note: Only the required fields will be given a star. Not all fields can have entries.

1. ****ADOPTION/AMENDMENT**
 - a. Administrative Modification or Formal Amendment. This section will already be entered once you select a TIP action.
2. GROUP PROJ
3. GROUP NAME
 - a. Group Project applies to lists of projects that do not need to be entered individually. Most projects will not be listed as a group project. Only SCAG and OCTA have the authority to create and modify group projects. Examples of grouped projects include: Arterial Pavement Management (ORA150102), Regional ATP (ORA150104) and HBP/HBRR (ORA020501).
4. TIP ID
 - a. A TIP Project ID identifies a project according to County, Year, Amendment created, and Number. Project IDs are solely for OCTA and SCAG use. These numbers are assigned by OCTA during review. Ex: ORA233306
5. ****CONFORMITY CATEGORY**
 - a. The Federal Clean Air Act (CAA) establishes air quality standards for various pollutants. All projects are required to be categorized and follow Section 176(c) of the CAA and Transportation Conformity Rules. For more information see page 158 of the SCAG 2025 TIP Guidelines.
6. ****SCAG MODELING #**
 - a. A "SCAG MODELING #" (RTP Project #) must be entered for all projects. This number can be input in the "Administrative Area" section of the form. All projects need to be in the RTP in order to be created in the TIP. These are assigned by SCAG. **However, new projects will not have a SCAG MODELING #, so this section may be skipped.**
7. CAP INC
 - a. Capacity Increase. This has two options: CI (Capacity Increasing, for projects that increase roadway capacity such as additional general-purpose lanes on state highways) and NCI (Not Capacity Increasing, for projects that do not increase roadway capacity such as transit, enhancements, and bike and pedestrian projects).
8. REGN SIG
9. MODE NO
 - a. OCTA does not utilize this function.
10. MODELING
11. COMMITTED FIELDS
12. CFP
13. RTP REVIEW
14. STUDY ONLY
15. ES FUND CATEGORY
16. DISTRICT ID
 - a. This area will already be filled out, as OCTA is in Caltrans District 12.

CMAQ

CMAQ

CMAQ PROJECT TYPE ▼	CMAQ PROJECT DESCRIPTION ▼
<input type="checkbox"/> QUALITATIVE <input type="checkbox"/> QUANTITATIVE	
OUTREACH ACTIVITY? ▼	INCLUDES TRANSIT OPERATING ASSISTANCE? ▼ CONGESTION REDUCTION PROJECT? ▼

If the project is not CMAQ funded skip to the next section. If the project has CMAQ funding, please fill out the CMAQ section using the drop down menus. Additionally, CMAQ air quality analysis documentation is required as an attachment for the Document Tab.

1. **CMAQ PROJECT TYPE
2. CMAQ PROJECT DESCRIPTION
3. **QUALITATIVE OR QUANTITATIVE
 - a. Choosing Quantitative will bring up fields to enter the analysis data.
4. OUTREACH ACTIVITY?
5. INCLUDES OPERATING ASSISTANCE?
6. CONGESTION REDUCTION PROJECT?

Project Alternative IDS

Project Alternative IDS - For multiple ids, add commas following each ID

FED AUTH # ▼	PPNO ▼	HBRR ▼
EA NUMBER ▼	MEASURE R # ▼	CFP ID ▼
SCAG RTP ID ▼	FTA GRANT NUM ▼	CALTRANS ID ▼
Measure M ▼	SB1 ▼	JOB KEY ID ▼
CTIPS ID N/A	Parent ID ▼	Fed Demo ID ▼
PRIMARY CONTACT ▼	PHONE (10-DIGIT) ▼	EMAIL ▼

Alternative project IDs may also be input in the "Project Alternative IDS" section as seen above. This includes the Planning Program Number (PPNO) and Project Number / Expenditure Authorization (EA). Project manager contact information can also be included in this section under "Primary Contact." This area will be moved to the Project IDS/Contacts Tab after being saved for the first time

1. FED AUTH #
2. PPNO
3. HBRR
4. EA NUMBER
5. MEASURE R #
6. CFP ID
7. **SCAG RTP ID

8. FTA GRANT NUM
9. CALTRANS ID
10. Measure M
11. SB1
12. JOB KEY ID
13. CTIPS ID
14. PARENT ID
15. FED DEMO ID
16. **PRIMARY CONTACT
17. **PHONE
18. **EMAIL

Project Information

Project Information

PROJECT TITLE [Spell Check](#)

PROJECT DESCRIPTION - GUIDELINES [Spell Check](#)

LEAD AGENCY: Orange County Transportation Authority (OCTA) | COUNTY CFP MODE: Orange | ☐ PROJECT IS PART OF A COMPLETE STREETS PLAN/NETWORK | GOODS MOVEMENT PROJECT? ☐

PRIMARY PROGRAM CODE: [?](#) | SECONDARY PROGRAM CODE: [?](#) [\[Add Tertiary Program Code\]](#)

FEDERAL UZA: | SUB-REGION: | POLITICAL DISTRICT - STATE SENATE: | POLITICAL DISTRICT - STATE ASSEMBLY: | POLITICAL DISTRICT - US HOUSE: | CITY COUNCIL DISTRICT:

SYSTEM:

Enter your project information as shown below. You can refer to the field descriptions on the following pages for detailed information.

1. **PROJECT TITLE
 - a. Title of the project.
2. **PROJECT DESCRIPTION
 - a. Project descriptions are required by 23 CFR part 450.324(e). These descriptions must include location/boundaries, nature of project, and scope. The OCFundtracker TIP database has built-in guidelines on writing project descriptions. Restate the project title in the description box before writing project descriptions.
 - b. In the Project Form next to the Project Description header, click the "GUIDELINES" link for a detailed explanation on how to correctly write a project description.
3. **LEAD AGENCY
 - a. Select the agency.
4. **COUNTY
 - a. Will be entered automatically as Orange.
5. CFP MODE
6. PROJECT IS A PART OF A COMPLETE STREETS PLAN/NETWORK
7. GOODS MOVEMENT PROJECT?
8. **PRIMARY PROGRAM CODE

- a. Regionally significant projects require program codes. Regionally significant projects are projects that impact the county/region, such as highways/freeways, fixed transit routes, and expansions to principal and arterials. The codes are listed based on the type of project. For example, "CA" denotes capacity enhancing improvements while "NC" denotes non-capacity enhancing improvements. The program code will assist SCAG staff when identifying regionally significant projects. It is important that the program code is accurate.
 - b. Program codes are developed using several components that explain the project type. The references section provides an explanation of each component within program codes.
9. SECONDARY PROGRAM CODE
10. **FEDERAL UZA
 - a. Federal Urbanized Areas are issued through the US Census Bureau. Orange County has two urbanized areas, Los Angeles-Long Beach-Santa Ana and Mission Viejo. Select the appropriate UZA where the project is located, please see the references section for a UZA map.
 - b. Additionally, please refer to the FHWA website for more information on Federal UZAs at https://www.fhwa.dot.gov/planning/census_issues/urbanized_areas_and_mpo_tma/
11. SUB-REGION
 - a. Sub-region/s that the project is located in.
12. POLITICAL DISTRICT – STATE SENATE
13. POLITICAL DISTRICT – STATE ASSEMBLY
14. POLITICAL DISTRICT – US HOUSE
15. CITY COUNCIL DISTRICT
16. **SYSTEM
 - a. There are three types of systems for projects: Local Highways, State Highways, and Transit. Depending on the system type, OCFundtracker will request different modeling information.
 - b. Transit – Includes bus, commuter rail systems, rideshare programs, vanpool, mass transit facilities, etc.
 - c. Local Highway – Includes streets and roads such as arterials, intersections, grade separations, street widening, etc.
 - d. State Highway – Includes highway projects, such as widening, on ramps, HOV facilities, etc.
 - e. In the case of new project creation, please make sure to save the project to enable system type selection. If the project has not been saved, the System drop-down menu will be greyed out.

For further information, see the references section on how to enter the correct system and program code for a project.

Environmental Information

Environmental Information

AIR BASIN - MAP	ENVIRONMENTAL DOCUMENT	ENV DOC COMPLETION DATE
<input type="text"/>	<input type="text"/>	<input type="text"/>

Programming Information (\$000)

Funding History 

FFY (OCT-SEPT)	FUND TYPE - FUND HELP	PE	ROW	CON	TOTAL
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0
GRAND TOTAL					\$0

☒ ESTIMATED TOTAL PROJECT COST IS EQUAL TO TOTAL PROGRAMMED \$

Input the project's environmental information which includes the air basin where the project is located, the estimated or actual environmental document, and the completion date or estimated completion date of the environmental document. See below for reference.

1. ****AIR BASIN**
 - a. The designated Air Basin for Orange County is the South Coast Air Basin (SCAB). SCAB covers Los Angeles County, Orange County, and portions of San Bernardino and Riverside County. These regions are determined by the California Air Resources Board (CARB).
2. ****ENVIRONMENTAL DOCUMENT**
 - a. Each project is required to go through environmental compliance. Select the appropriate Environmental Document type for the project. Federal approval is required when a project is proposed for funding with Title 23 U.S.C. or Federal Transit Act funds, or when it requires Federal approval action by FHWA/FTA.
3. ****ENV DOC COMPLETION DATE**
 - a. Please enter the completion date (or anticipated completion date) of the associated environmental document.
 - b. Please see page 95 in the SCAG 2025 TIP Guidelines for more information on Environmental Codes.

Programming Information (\$000)

Programming Information (\$000)

Funding History 

FFY (OCT-SEPT)	FUND TYPE - FUND HELP	PE	ROW	CON	TOTAL
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	\$0
GRAND TOTAL					\$0

☒ ESTIMATED TOTAL PROJECT COST IS EQUAL TO TOTAL PROGRAMMED \$

The programming information is a funding schedule for each project. This section explains when and how the project will be funded. It is broken down by federal fiscal year, fund type, phase, and estimated total project cost.

1. FFY
 - a. Select the fiscal year of the associated fund type.
2. FUND TYPE

- a. The fund source should reflect the accounts from which the funds are being withdrawn to fund the project. Funding will be distributed across three phases of the project: PE, ROW, and CON.
 - i. PE: Preliminary Engineering/Project Approval & Environmental Document (PA&ED)/Plans, Specifications, and Estimates (PS&E)
 - ii. ROW: Right-Of-Way Capital/Right-Of-Way Support/Right-Of-Way Utilities
 - iii. CON: Construction Capital/Construction Support
3. ESTIMATED TOTAL PROJECT COST IS EQUAL TO TOTAL PROGRAMMED \$
 - a. If estimated total project cost is equal to the total programmed funds, check the box next to "Estimated Total Project Cost is Equal to Total Programmed \$." If not, fill in the estimated total project cost in the box to the right of the programmed grand total as shown above.
 - b. The Estimated Total Project Cost cannot be lower than the total programmed amount but can be higher for some projects.

The SCAG 2025 FTIP Guidelines lists the federal and state fund sources. The OCFundtracker has a complete listing of fund sources, which includes federal, state, and local sources. The most commonly used fund sources for local agencies are listed in the references section of this guide.

Note: To easily delete funding, click the "x" next to the total funding amount per fiscal year and fund source to delete the entire row. Additionally, for group listings, all funds for projects go into the construction phase.

Schedule Information

Schedule Information

HAS IMPLEMENTATION STATUS CHANGED?	PROJECT COMPLETION DATE	CURRENT IMPLEMENTATION STATUS	LAST UPDATED
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

	SCHEDULED START		ACTUAL START		SCHEDULED COMPLETION		ACTUAL COMPLETION	
	MONTH	YEAR	MONTH	YEAR	MONTH	YEAR	MONTH	YEAR
PA&ED	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
PS&E	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
ROW	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
CON	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Please fill out the scheduling information / timeline of the project as shown above. This should be consistent with your funding sources and only needs to be updated when there is a significant change to constitute an amendment.

1. ****HAS IMPLEMENTATION STATUS CHANGED?**
2. ****PROJECT COMPLETION DATE**
 - a. Please enter the completion (or anticipated) date for the project. This should be consistent with your funding sources. This cannot be modified if the project is modeled or a Transportation Control Measures (TCM) in the first two years of the TIP.
3. ****CURRENT IMPLEMENTATION STATUS**
 - a. The Implementation Status, or Element Code, refers to the status of the project. This should be consistent with your funding sources.

“Has Implementation Status Changed?,” “Project Completion Date,” and “Current Implementation Status” are all REQUIRED. The rest of the section is divided into four separate parts and is optional. Enter the appropriate dates within each applicable section, if desired:

Change Reason

Change reason should default to “New Project” when creating a new project. The project Changes section will automatically fill in once you save or submit the project. It tracks changes made to the TIP.

Change Reason

NEW PROJECT

[SEE HISTORICAL COMMENTS]

GENERAL COMMENTS - GUIDANCE: (Please comment on the status of the project and provide the reason for any changes to the project description, funding information and schedule made above.)

[SEE HISTORICAL COMMENTS]

MODELING COMMENTS - (If the project scope has been changed, the project was delayed or advanced or the total projects cost has changed, provide a reason for the changes. If there is no significant change made above note that there is "no significant change made")

[SEE HISTORICAL COMMENTS]

TCM COMMENTS - (If the project scope has been changed, the project was delayed or advanced or the total projects cost has changed, provide a reason for the changes. If there is no significant change made above note that there is "no significant change made")

[SEE HISTORICAL COMMENTS]

AMENDMENT COMMENTS

[SEE HISTORICAL COMMENTS]

CMP COMMENTS

Save Submit for Review

There are four selections available for the Change Reason. See below for reference:

- Complete Project
- Delete Project
- New Project
- Schedule / Funding / Scope

Change Reason

☐ COMPLETE PROJECT
☐ DELETE PROJECT
☐ NEW PROJECT
☒ SCHEDULE / FUNDING / SCOPE(select an option below)

OTHER CHANGE REASON

The Schedule / Funding / Scope option has an expanded selection with specific change reasons. When you choose this option, you must select ONE of the following for your change reason. A list of commonly used change reasons and their explanations are listed below.

Selection	Description
Combined Project	Project is being combined with another project.
Combined Project & Schedule Advance	Project is being combined and advanced in schedule.
Combined Project & Schedule Delay	Project is being combined and delayed in schedule.
Cost Change and Schedule Advance	Change in cost and advancing scheduling.
Cost Change and Schedule Delay	Change in cost and delay scheduling.

Cost Decrease	Decreasing the cost of the project.
Cost Increase	Increasing the cost of the project.
Delete-Combined	Deleted combined project.
Description Change	Change description of the project. Please do not select this if the change alters the scope of the project.
Fund Source Change	Change funding sources with no cost change.
Lead Agency Change	Change lead agency.
Limit Change	Change in project limits.
Minor Change	Change has no impact on scope, cost, or schedule.
Modeling Details Update	Updates for modeling details.
New Combined Project	New project by combining two existing projects.
New Project	New project.
New Split Project	Newly split project.
Re Programmed	Project funding has been re programmed.
Schedule Advanced	Advancing project schedule.
Schedule Delay	Delay project schedule.
Scope Change	Change scope of project. This may require remodeling of the project.
Split Project	Splitting project into separate projects.
Split Project with Schedule Advance	Splitting project into separate projects and advancing scheduling
Split Project with Schedule Delay	Splitting project into separate projects and delaying scheduling
Technical Change	Change in technical details.

A list of unused change reasons is provided below.

Selection
AC Conversion
Awarded Project
AC Incremental Conversion #1
AC Incremental Conversion #2
AC Incremental Conversion #3
Corridor Mobility Improvement Account
Engineering Change
Fund Transfer Agreement
Hold STIP Project
New Payback Project
New Project ID
Right of Way Change
Timely IMP Issue
Un Voted Project
Voted Extension
Voted Project
Voted Revision

Once a reason is selected, enter comments in the appropriate boxes to provide relevant information regarding your amendment. A description of each comment field is listed below.

****General Comments**

Include a short description and reasoning for the change(s) to the project description, funding information and schedule. This section is required.

For example:

- Cost increase due to utility relocation.
- Received new grant for \$1,000.
- Delay because additional right-of-way acquisition is necessary.

Modeling Comments

If the project scope has been changed, the project was delayed or advanced or the total project cost has changed, provide a reason for the changes. If there is no significant change made, note that there is no significant change made.

TCM Comments

This is for comments related to TCM projects. If the project scope has been changed, the project was delayed or advanced or the total project's cost has changed, provide a reason for the changes. Information about TCM substitutions can also be included here, if applicable.

Amendment Comments

Comments about the amendment can be included here.

CMP Comments

Comments about CMP can be included here.

Project Changes (From Previous Version):

This is automatically generated upon saving or submittal. This section is for OCTA and SCAG purposes and explains every change made to the project. Please do not attempt to alter this.

Saving and Submitting a Project

When you are finished entering your project information, scroll to the bottom of the page and select one of the following options.

- **Save** - Use this option if further changes will need to be made to this project before submitting it for review.
- **Save and Submit to CTC** - Use this option to submit the project to OCTA for review.

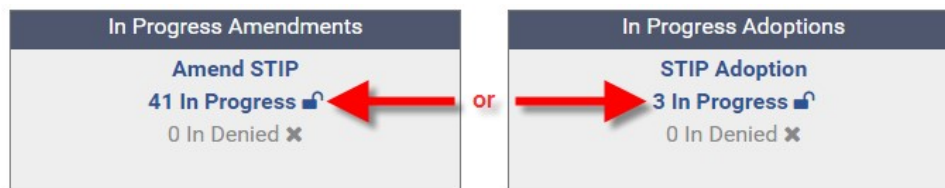
If issues are found that would prevent the project from being reviewed (e.g., invalid values or missing fields), a list of remaining requirements will be displayed at the top of the form as shown below:

BEFORE SUBMITTING TO OCTA, PLEASE RESOLVE THE FOLLOWING ERRORS:

- NARRATIVE DESCRIPTION IS REQUIRED
- CHANGE REASONS ARE REQUIRED

Submitting Multiple Projects

If you have multiple amendments, you can submit them to OCTA in bulk. Access the projects you wish to submit by clicking the “IN PROGRESS” button for either amendments or adoptions on the home page.



You will be redirected to your “in progress” projects. On the right side of the page, all projects that are ready to be submitted will have a “SUBMIT” button next to them. If your project is missing information, the submit button will not appear.

AMENDMENTS IN PROGRESS				PRINTER FRIENDLY	EXPORT TO EXCEL	SUBMIT		
TIP ID	LEAD AGENCY	DOC	PROJECT TITLE	CHANGE REASON	MATCH ALERT	MAP	DOC	
ORA152211	Anaheim, City of	19-09	Nohl Ranch Open Space Trail	MINOR CHANGE	Fund Match Warning in FY2021			<input checked="" type="checkbox"/>
ORA20192025	Fountain Valley, City of	19-10	Eco Demo Title	New Project				<input checked="" type="checkbox"/> [SUBMIT]
ORA113009	Irvine, City of	19-08	Peters Canyon Off-Street Bikeway	COST DECREASE				<input checked="" type="checkbox"/> [SUBMIT]
ORA171901	Orange County Transportation Authority (OCTA)	19-09	Group Projects for Planning and Technical Studies	NEW PROJECT				<input checked="" type="checkbox"/>

To submit multiple projects to OCTA at once, click the check boxes for the projects you wish to submit and click the orange SUBMIT button at the top of the screen. If you wish to submit a single project, you can simply click the blue SUBMIT button next to the checkbox.

Congestion Management Plan (CMP) Process

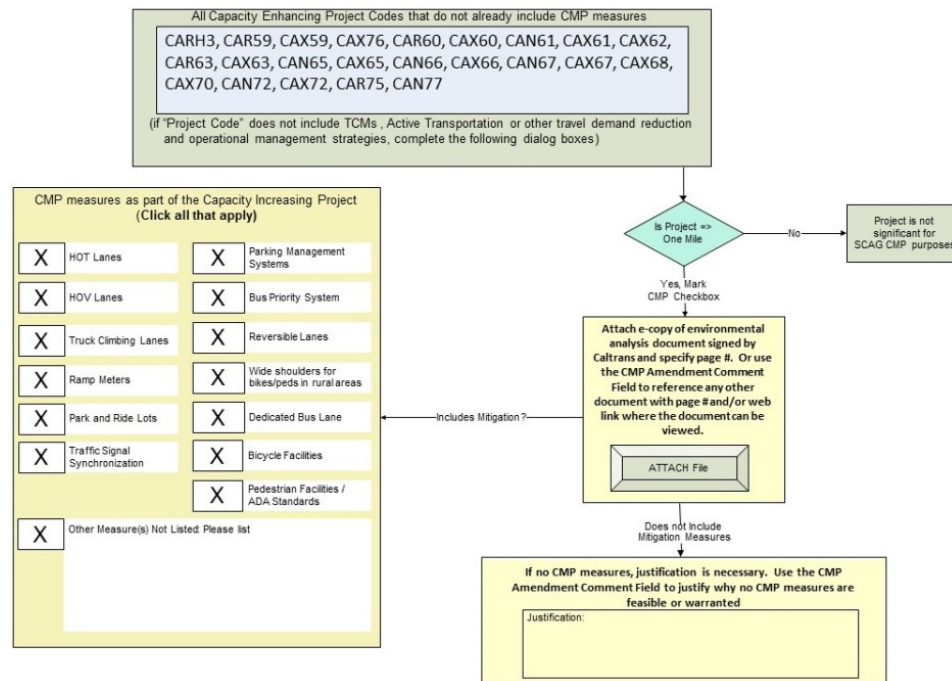
In the SCAG region, federal regulations stipulate that no federal funds may be programmed for any project that significantly increase Single Occupancy Vehicle (SOV) capacity *unless* the project is addressed as part of a congestion management process. The TIP, as the programming document for all federal transportation funds, must be consistent with the regulations.

SCAG worked closely with FHWA and determined that any SOV capacity increasing project that adds at a minimum one (1) mile or more in length meets criteria for CMP review. All TIP submissions for significant SOV capacity increasing projects that are at least 1 mile in length and above must include documentation that demonstrates TDM or other operational management strategies that were considered and incorporated into the project.

In the TIP submission, if a project increases SOV capacity by at least 1 mile or more, enter which travel demand reduction or operational management strategies will be included as part of the project in the submission.

If the new or amended project has an adopted planning and/or environmental document that indicates which demand reduction or operational management strategies were evaluated/incorporated, include a copy of or link to the document.

CMP details can be added at the bottom of the Project Form in the “Change Reason” section under “CMP COMMENTS”. See below for a flow chart and a list of program codes that are CMP projects.



Active Transportation Program (ATP) Process

The ATP process applies if a project includes an active transportation component, enter the type, the length, and the estimated cost for the active transportation component.

If the project has an adopted planning and/or environmental document that indicates what active transportation strategies were evaluated/incorporated, include a copy of or link to the document.

See image below for program codes that may include ATP Components:

Larger Projects that include active transportation
 CART1, CAXT1, CAYT1, CART2, CAXT2, CAYT2, CART3, CAXT3, CAYT3, CANT4, CAXT4, CAYT4, CANT5, CAXT5, CAYT5, CANT6, CAXT6, CAYT6, CAXT7, CAYT7, CANT8, CAXT8, CAYT8, CART0, CAXT0, CAYT0
 NCRT1, NCRT3, NCRT0, NCRT2

If a program code associated with ATP is selected, a section titled “ATP Project Attributes” will appear below the “Schedule Information” section, shown below. Check the appropriate box(es) and add length and cost of the active transportation portion if the information is available.

ATP Attributes

Active Transportation Project as part of larger project(Click all that apply)

- ☐ Class 1 Bike Path/Cycletrack
- ☐ Class 2 Bike Lane
- ☐ Class 3 Bike Route/Signage
- ☐ Bicycle Blvd/Bike friendly St
- ☐ Bicycle Parking (Lockers/Racks)
- ☐ Bicycle Traffic Signals
- ☐ Sidewalks (New)
- ☐ Sidewalks (Rehab/Repair/Widen)
- ☐ Bulbouts/Median Refuge
- ☐ Midblock Crossing Signals
- ☐ Unknown/Unspecified (if checked user must enter description)

Length of Active Transportation Component (Feet), if known

Cost of Active Transportation Component (\$), if known

Modifying an Existing Project

Step 1 – Accessing Modify Project Menu

- To begin making changes to an existing **accepted** project, click the "Amend TIP" link (to associate the changes with an open TIP amendment) or "TIP Adoption" link (to associate the changes with an open TIP adoption) on the main menu.
 - A TIP adoption happens every 2 years and is the start of a new FTIP cycle. A TIP amendment occurs monthly and is either a formal amendment or an administrative modification. TIP amendments make changes to the project list submitted in the initial base TIP adoption.

<div>In Progress Amendments</div> <div>  Amend TIP ? 51 In Progress  9 In Denied by CTC  </div>	<div>In Progress Adoptions</div> <div> TIP Adoption ?  0 In Progress  0 In Denied by CTC  </div>
<div>Submitted Amendments (to CTC)</div> <div> 21 Pending CTC Approval 82 Accepted by CTC  </div>	<div>Submitted Adoptions (to CTC)</div> <div> 0 Pending CTC Approval 0 Accepted by CTC  </div>

- If either of these links is disabled (gray), this means that the MPO has no open amendment or adoption TIPs.
- Click on "Amend/modify Project in TIP" to access the list of existing projects.

TIP
<ul style="list-style-type: none"> • Amend/modify Project In TIP ← • Create New Project • Carry Over Project

- Choose the appropriate amendment or adoption TIP for your project.

TIP
<p>Project updates or additions must be associated with an open TIP Action for review/approval.</p> <p>Choose an open TIP Action below to track the updates or additions you will be entering:</p> <ul style="list-style-type: none"> • [23-16] Administrative - Orange County Transportation Authority (OCTA) • [23-17] Formal - Orange County Transportation Authority (OCTA) • [23-97] Formal - Orange County Transportation Authority (OCTA)

Step 2 – Selecting a Project to Modify

- Use the search form to find the project.

PROJECT SEARCH RESULTS		164 PROJECTS LISTED		PRINTER FRIENDLY	
PROJECT ID/OTHER IDs	LEAD AGENCY	SYSTEM	ROUTE	CONFORMITY CATEGORY	GROUP PROJ
	ALL				
TIP SOURCE	INCLUDE PROJECTS	STATUS	FUNDING TYPE	FFY	
Any 23 TIP	IN PROGRESS, PENDING, A	ALL	Please click here to select....		
			ALL		
DESCRIPTION/TITLE/STREET NAME	PRIMARY CONTACT NAME	CMP	ATP	CAP INC	REGN SIG
PROGRAM CODE					
<div>Search</div>					

TIP ID	TIP	LEAD AGENCY	TITLE	CONFORM_CATEGORY
ORA990933	[AMEND] 23-00	Laguna Beach, City of	Transit Operating Assistance (Laguna Beach)	EXEMPT - 93.126
ORA211702	[AMEND] 23-00	Caltrans	Grouped Projects for Safety Improvements, Shoulder Improvements, Pavement Resurfacing and/or Rehabilitation - Minor Program	EXEMPT - 93.126

- Next to each TIP ID is a value of "LOCKED" or "[AMEND]":
 - **LOCKED** - This project has already been submitted for review, and the request has not yet been accepted or denied. Changes cannot be made at this time. Click this link to view the pending changes.
 - **[AMEND]** - Click this link to begin making changes to this project.

If the desired project does not appear in the project list, it is possible that changes to the project are already "In-Progress." Return to the Main Menu and choose the "In-Progress" links as described earlier in this guide.

Step 3 – Making Changes

Updating and making changes to a project is an important aspect of the TIP cycle. Projects are typically updated to include but are not limited to description changes, updating scheduling information, changing

funding sources and funding amounts, changing project managers, deleting projects, completing projects, delaying projects, updating project status, and updating environmental information.

Common amendment changes to the TIP include:

1. Adding a Fund Source.
2. Moving/Delaying/Advancing Funds.
3. Deleting Fund Sources.

Adding a Fund Type

To add a Fund Type, locate the Programming Information section of the project page.

- Select the appropriate Fiscal Year.
- Select the appropriate Fund Type.
- Enter dollar amount in the appropriate phase (**in thousands**).
- Click "Save".

There is a fund help link available in the Programming Information box. Clicking this link will pop up another window with descriptions of each fund type.

FUND HELP	
FUND TYPE	DESCRIPTION
FEDERAL	
STP-TIP - SURFACE TRANSPORTATION PROGRAM-TIP	FEDERAL PARTICIPATION: 88.53 percent (Highway Maintenance (HM) Program Projects - FEDERAL PARTICIPATION: 100 percent). STP anywhere funds assigned to Caltrans by the 1989 blueprint legislation. Commonly used to fund STIP and SHOPP programming, construction, reconstruction, rehabilitation, resurfacing, restoration, and operational improvements for highways including Interstate highways and bridges (including bridges on public roads of all functional classifications), including any such construction or reconstruction necessary to accommodate other transportation modes, and including the seismic retrofit of bridges. For more see http://www.fhwa.dot.gov/infrastructure/progadmin/covert21.htm
STP-RIP - SURFACE TRANSPORTATION PROGRAM-RIP	FEDERAL PARTICIPATION: 88.53 percent (Highway Maintenance (HM) Program Projects - FEDERAL PARTICIPATION: 100 percent). STP anywhere funds assigned to Caltrans by the 1989 blueprint legislation. Commonly used to fund STIP and SHOPP programming, construction, reconstruction, rehabilitation, resurfacing, restoration, and operational improvements for highways including Interstate highways and bridges (including bridges on public roads of all functional classifications), including any such construction or reconstruction necessary to accommodate other transportation modes, and including the seismic retrofit of bridges. For more see http://www.fhwa.dot.gov/infrastructure/progadmin/covert21.htm
STPL - STP LOCAL	This fund represents the fifty percent of the STP funds that are divided between urbanized areas over 200,000 in population and the remaining areas of the state. This is the fund that is referred to as RSTR. Rural Non-MPO should also be excluded except Humboldt and Mendocino for transit projects.

Move / Delay / Advance Fund Sources

To Move/Delay/Advance locate the Programming Information section of the project page.

- Locate Fiscal Year drop down menus.
- Select appropriate Fund Type to Delay/Advance.
- Select appropriate Fiscal Year.
- Save.

Delete Fund Sources

To Delete a Fund Source, locate the Programming Information section of the project page.

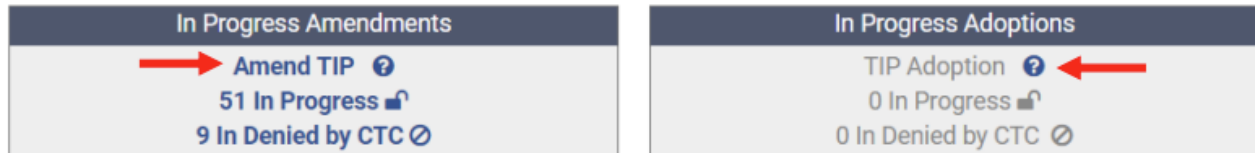
- Locate Fund Type to delete.
- Click the "X" to the right of the listing to delete the fund source.
- Save.

Please see "Saving and Submitting a Project" for saving instructions.

Saved Projects

Editing a Saved Project

Saved projects can be quickly accessed using the “In Progress” links under the “In Progress Amendments” or “In Progress Adoptions” sections of the main menu.



Editing will allow you to make changes to a project that was previously saved prior to submitting to OCTA.

- From the main menu, click the appropriate “In Progress” link.
- Locate the project you are editing.
- Click on the TIP ID you wish to edit to access the project in its previously saved state.

AMENDMENTS IN PROGRESS								PRINTER FRIENDLY	EXPORT TO EXCEL	SUBMIT
TIP ID	LEAD AGENCY	DOC	PROJECT TITLE	CHANGE REASON	MATCH ALERT	MAP	DOC			
ORA20192024	Anaheim, City of	19-01	Eco Test nb 06130928	New Project	Fund Match Warning in FY2019					[SUBMIT]

Deleting a Saved Project

To retract a request for project review, first click the "... Pending" link of the "Submitted Amendments" or "Submitted Adoptions" section of the main menu.

Submitted Amendments (to CTC)	Submitted Adoptions (to CTC)
21 Pending CTC Approval	0 Pending CTC Approval
82 Accepted by CTC	0 Accepted by CTC

Select projects to un-submit by checking the checkboxes on the right, and click the “UN-SUBMIT” button at the top-right:

					ACCEPT	DENY	UN-SUBMIT
CHANGE REASON	MATCH ALERT	MAP	DOC				
COST INCREASE				<input type="checkbox"/>			
COST INCREASE			<input type="checkbox"/>	<input type="checkbox"/>			
COST INCREASE			<input type="checkbox"/>	<input type="checkbox"/>			
COST INCREASE			<input type="checkbox"/>	<input type="checkbox"/>			
COST INCREASE			<input type="checkbox"/>	<input type="checkbox"/>			

Projects can only be deleted if they are pending CTC approval. Once projects have been accepted by the CTC (i.e., OCTA) then a request must be sent to OCTA to have the project sent back to “In Progress.”

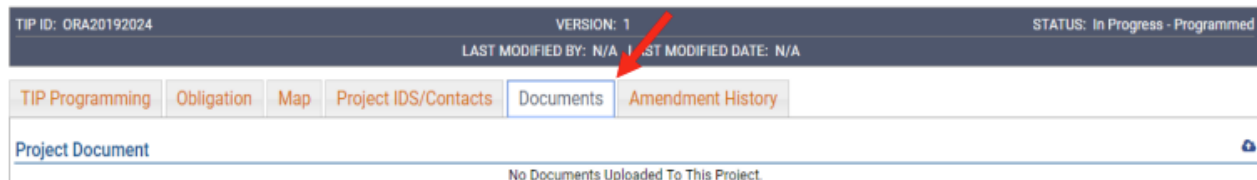
Note: If the project is a new project, this will completely remove the project from the OCFundtracker. Projects that are amendments to previously approved projects will only delete the amended version, not the approved version.

Documents and Mapping

Occasionally, supporting documents will be required for projects. It is appropriate to update these documents when necessary. Uploading documents should be done during the amendment process or when a project is first created.


Step 1 – Access the Upload Documents Menu

- From the project amendment page, scroll to the top of the page and click on the “Documents” tab.



TIP ID: ORA20192024 VERSION: 1 STATUS: In Progress - Programmed
LAST MODIFIED BY: N/A LAST MODIFIED DATE: N/A

TIP Programming Obligation Map Project IDS/Contacts **Documents** Amendment History

Project Document 

No Documents Uploaded To This Project.

- Click the icon on the right-hand side to upload documents.



TIP ID: ORA20192024 VERSION: 1 STATUS: In Progress - Programmed
LAST MODIFIED BY: N/A LAST MODIFIED DATE: N/A

TIP Programming Obligation Map Project IDS/Contacts **Documents** Amendment History

Project Document 

No Documents Uploaded To This Project.

Step 2 – Upload the Document

- Click “Choose File” and select the document you wish to upload, the document date, document description, and select a document type from the drop-down menu.
- Click “Upload Selected”

Upload Project Documents

Enter A Description And Then Select The Document You Want To Upload By Clicking On The “Choose File” Button.

Document Date	Document Description (Optional)	Document Type	Filename
6/14/19	Test Document	Final Report	<input type="button" value="Choose File"/> TEST.docx
			<input type="button" value="Choose File"/> No fil...chosen
			<input type="button" value="Choose File"/> No fil...chosen
			<input type="button" value="Choose File"/> No fil...chosen
			<input type="button" value="Choose File"/> No fil...chosen
			<input type="button" value="Choose File"/> No fil...chosen

Performance Metrics Tab

Performance measures are required for all new projects in the FTIP unless the project is a study. There are five main performance metrics:

- PM1 – Safety
- PM2 – Pavement / Bridge Condition
- PM3 – System Performances
- TAM/Transit Safety
- Equity

These fields will appear within the Performance Measures tab depending on the option selected in the “System” field of the TIP Programming tab. You may select one or more of the performance metrics options that appear. Once you have selected one of the main performance metrics listed above, a new list of performance measures will appear. Please utilize the dropdown feature to select whether the project provides Significant, Moderate, or Minimal/No Improvement for these fields. Definitions of these ratings are provided in the “View Instructions” features at the top of the tab.

- This section is required for all new projects entered into the FTIP unless the project is a study. Please select one or multiple of the performance metrics listed: PM1 – Safety, PM2 – Pavement/Bridge Condition, PM3 – System Performance, and Transit Asset Management (TAM) for transit projects. Once selected, please select a Rating from the dropdown boxes on the applicable performance measures. There are instructions which describe the definition of each Rating in the “VIEW INSTRUCTIONS” field.
- Below is an example of a project that incorporates PM1 and Equity. The dropdown menus are grayed out as the project is Read-Only and waiting for approval. When entering these metrics into a project, you will be able to select different options.

Select Sections

☒ PM1 - SAFETY
 ☐ PM2 - PAVEMENT/BRIDGE CONDITION
 ☐ PM3 - SYSTEM PERFORMANCE
 ☒ Equity

PM1 - SAFETY

Roadway crash fatality impact	Rating Minimal Improvement
Roadway crash fatality - % of Total Project Cost	Percentage
Roadway crash serious injury impact	Rating Minimal Improvement
Roadway crash serious injury - % of Total Project Cost	Percentage
Roadway crash fatality and serious injury impact for Bike and Pedestrians	Rating Minimal Improvement
Roadway crash fatality and serious injury for Bike and Pedestrians - % of Total Project Cost	Percentage

EQUITY

Service: Is the proposed project located in, adjacent to (within 250 feet), or serving a disadvantaged area (per SB 535, Climate Economic Justice Screening Tool, or Equitable Transportation Community Explorer)? (Required)

Select one

Yes

Impacts: Have underserved populations explicitly been included in any assessments (e.g., environmental documents, equity assessment, staff report) of the project?

Select one

- Select a Option -

Outreach: Were underserved populations involved in the project development process and given ample opportunity to participate in decision-making processes?

Select one

- Select a Option -

Metrics: How will impacts of the project be evaluated and monitored ? The following are broad examples of potential performance metrics. (check all that apply, or add specific metrics to the Project-Specific Performance Metrics box below)

Select many

- Select a Option -

Project-Specific Performance Metrics

Equity

Equity is a new feature that was added to the FTIP. This section is required for all projects in the database. The Performance Metrics tab with the Equity section does not appear until the project is saved for the first time, then you can re-open it and work on adding in the rest of the information. Only the first question is required.

Questions:

1. ****Service:** Is the proposed project located in, adjacent to (within 250 feet), or serving a disadvantaged area (per SB 535, Climate Economic Justice Screening Tool, or Equitable Transportation Community Explorer)? (Required)
2. **Impacts:** Have underserved populations explicitly been included in any assessments (e.g., environmental documents, equity assessment, staff report) of the project?
3. **Outreach:** Were underserved populations involved in the project development process and given ample opportunity to participate in decision-making processes?
4. **Metrics:** How will impacts of the project be evaluated and monitored? The following are broad examples of potential performance metrics. (check all that apply, or add specific metrics to the Project-Specific Performance Metrics box below)

Embedded below are links to screening tools. Equity is tied to mapping because by evaluating funding geographically, SCAG can assess if there are issues with the balance of transportation investments in underserved areas. In the future, an interactive map could plot projects and highlight major features, such as project scope, funding, and lead agency information.

Screening Tools

- [SB 535](#)
- [Priority Equity Community Boundary](#)

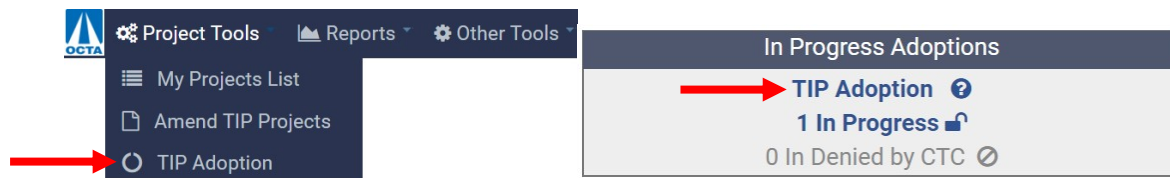
- [Climate Economic Justice Screening Tool](#)
- [Equitable Transportation Community Explorer](#)

Carry Over

This section will go over the “CARRY OVER” function. A carry over is initiated with every new TIP document cycle. This process allows agencies to move projects from an outgoing TIP cycle to a new TIP adoption. Note: You can only complete this action when a TIP adoption is in progress.

Step 1 – Access the TIP Adoption Menu

- From the Main Menu, hover over the “Project Tools” tab and select “TIP Adoption.” You can also click “TIP Adoption” in the “In Progress Amendments” Box on the right side of the screen. You will then be redirected to a new page.



- On this page, select “Carry Over Projects”.



- This directly links to the specified TIP adoption.

MY PROJECT LIST					
144 PROJECTS LISTED					
PROJECT ID/OTHER IDs		FTIP SOURCE	LEAD AGENCY	SYSTEM	ROUTI
		ALL	ALL		
INCLUDE PROJECTS		STATUS	FUNDING TYPE		
IN PROGRESS, PENDING, A		ALL	ALL		
PRIMARY CONTACT NAME			010 FEDERAL		
			2019 EARMARK REPURPOSING		
			2020 EARMARK REPURPOSING		
			-ALL		
PROGRAM CODE			CMP	ATP	CAP INC
Please click here to select.....					
FTIP ID	MPO	LEAD AGENCY	FTIP	PROJECT TITLE	
ORA190902	[CARRY-OVER]	Orange County Transportation Authority (OCTA)	Anaheim, City of	23-00	Citywide SRTS Sidewalk Gap Closure
ORA152211	In Progress - Programmed on 23-17	Orange County Transportation Authority (OCTA)	Anaheim, City of	23-17	Nohl Ranch Open Space Trail
ORA190906	[CARRY-OVER]	Orange County Transportation Authority (OCTA)	Brea, City of	23-15	OC Loop Brea Gap Closure
ORA231702	In Progress - Programmed on 23-17	Orange County Transportation Authority (OCTA)	Buena Park, City of	23-17	Dale / Whitaker Complete Streets Project

- This option allows you to view a summary of programmed projects and their status.

Programmed 2023 Projects	144
Carried Over to 2025 FTIP	0
Completed	0
Deleted	0
Delayed	0
Total	0

- Click [CARRY-OVER] to carry the project over. Make necessary changes and save to complete the process.

In addition to the carry-over options described above, there is also a link to carry-over under the “Amend TIP” menu. Ignore this, as it does NOT carry projects over into the new TIP cycle.

TIP
<ul style="list-style-type: none"> • Amend/modify Project In TIP • Create New Project • Carry Over Project

City Council Resolution

After making changes to the 2025 FTIP, the agency should submit a resolution from the City Council or governing Board to OCTA. A resolution template can be found on the OCTA FTIP website here: [OCTA - FTIP](#) Additionally, if there were any changes made to the projects during the carry-over process, please provide all back up documentation associated with the changes.

Back up documentation should be uploaded to the project in the database. Instructions can be found on page 25 to upload documents.

Back up documentation may include:

- funding approval letters
- federal register listings
- project award listings from an administering agency.

The package should be emailed to Ben Ku (bku@octa.net) and Mina Kim (mkim@octa.net)

Different Tabs

Obligation Tab

- Clicking on the “Obligation” tab displays obligation data for the current project. This section is not required.

TIP ID: IMP1307025		VERSION: 1		LAST MODIFIED BY: N/A LAST MODIFIED DATE: N/A	
TIP Programming	Obligation	Map	Project IDS/Contacts	Documents	Amendment History
Obligation Data FHWA Prior Detail Show/Hide					
FFY	TIP FUNDS	TIP \$	OBLIGATED FUNDS	OBLIGATED	UNOBLIGATED
2019	NH - National Highway System CON	\$1,000		\$0	\$1,000
GRAND TOTAL		\$1,000		\$0	\$1,000
Obligated Detail Show/Hide					

Map Tab

- Clicking on the “Map” tab displays the current location of the project and any associated road segments or nodes. Please note that not all projects have mapping information. If you would like to map your project, there are detailed instructions on OCFundtracker. This information is not required. From the map tab, click the “MAP TUTORIAL” link on the right-hand side for step-by-step instructions to map your project.

TIP ID: ORA152211	VERSION: 8	STATUS: In Progress - Programmed
LAST MODIFIED BY: N/A LAST MODIFIED DATE: N/A		

TIP Programming
Obligation
Map
Project IDS/Contacts
Documents
Amendment History

Nohl Ranch Road, Anaheim, CA, USA
MAP ADDRESS

Select Multiple Segments
List Selected Routes
Measure a Distance
Adjust Segment Start/End
Map Tutorial

Map
Satellite

*Zoom in further to mark on the map.
SAVE LOCATION
RESET

Map data ©2019 Google Terms of Use Report a map error

Project IDs Tab

- Clicking on the "Project IDS/Contracts" tab displays alternate identifiers for the current project:

TIP ID: ORA152211			VERSION: 11	STATUS: Programmed
LAST MODIFIED BY: Heidi Busslinger			LAST MODIFIED DATE: 1/20/2020	
TIP Programming Obligation Map Project IDS/Contracts Documents Amendment History Performance Metrics				
Project Alternative IDS - For multiple ids, add commas following each ID				
FED AUTH #	PPNO	HBRR		
EA NUMBER	MEASURE R #	CFP ID		
SCAG RTP ID 7120004	FTA GRANT NUM	CALTRANS ID		
Measure M	SB1	JOB KEY ID		
CTIPS ID N/A	Parent ID	Fed Demo ID		
PRIMARY CONTACT Cesar Carrillo	PHONE (10-DIGIT) 7147655175	EMAIL ccarrillo@anaheim.net		

The following table provides an explanation for the fields:

FED AUTH #	Federal authorization number
EA NUMBER	Expenditure Authorization number
SCAG RTP ID	RTP Modeling Number, sometimes the same as the TIP ID
Measure M	Measure M2 project (i.e., Project V, X, etc.)
PPNO	Planning Program Number
Measure R #	Not applicable to Orange County
FTA GRANT NUM	FTA grant number (i.e., CA-20XX-XX)
SB1	SB1 grant number
HBRR	Highway Bridge Program bridge number
CFP ID	OCTA internal number
CALTRANS ID	Caltrans project ID starting with the four-digit agency ID [i.e., 6071(120)]
JOB KEY ID	OCTA internal budget number
Parent ID	TIP ID of "parent" project for which this project represents one segment (if applicable)
Fed Demo ID	Earmark Identification number
PRIMARY CONTACT	Project Manager

Documents Tab

- Clicking on the "Documents" tab displays uploaded documents for the current project:

Project ID: 1234567		VERSION: 1	STATUS: In Progress - Programmed
LAST MODIFIED BY: N/A		LAST MODIFIED DATE: N/A	
STIP Programming Obligation Map Project IDS Documents Amendment History			
Project Documents			
DOC DATE	DESCRIPTION	TYPE	FILE SIZE
11/27/2017	TEST2	Other	12KB
		UPLOADED BY	UPLOADED ON
		ECO@example.com	11/27/2017
UPDATE TYPE(S)			

Amendment History Tab

- Clicking on the "Amendment History" tab displays a history of modifications to the current project. This list only includes accepted versions of the project. In-Progress modifications to a project will not appear in this list.

TIP ID: IMP1307025				VERSION: 1		
LAST MODIFIED BY: N/A LAST MODIFIED DATE: N/A						
TIP Programming		Obligation	Map	Project IDS/Contacts	Documents	Amendment History
Version History						
VERSION	TIP	PROJECT TITLE		STATUS	MPO APPROVAL	STAT APPR

Performance Measures Tab

This section is required for all new projects entered into the FTIP unless the project is a study.

References

Conformity Category

Category	Description
Exempt – 93.126	Projects that are exempt are: mass transit projects such as operations, vehicle rehab, build reconstruction, communication, purchase of vehicles; air quality promotion projects such as van-pooling promotion; safety projects such as railroad/highway crossing warning devices, medians barriers, fencing; other projects such as planning and technical studies, grants for training programs, etc. Please note that this is not a comprehensive listing of Exempt projects. For more information see page 80 of the SCAG 2025 TIP Guidelines.
Exempt – 93.127	Projects that are exempt from regional emissions analysis requirements. For more information see page 81 of the SCAG 2025 TIP Guidelines.
Exempt – 93.128	Traffic Signal Synchronization (less than 3 signals) projects
Exempt / Modeled	Projects that have been modeled but only have engineering funding.
Non-Exempt	Projects that have regional significance or can significantly alter air quality are Non-Exempt from CAA conformity rules. Projects such as highway interchanges, local road and arterials, bridge and grade separations, bus transit and facilities, construction, widening, etc.
Non-Exempt / Not Modeled	Projects that are submitted in the FTIP with engineering funding only and have not been modeled.
Non-Federal / Non-Regional	Highway or transit projects that require no federal funding or approval but are funded by an agency that routinely receives funds from the FHWA or FTA. These projects include regionally significant or goods movement projects, capacity

	enhancing projects, federally funded future phases, environmental documents that require federal approval, or projects that will help meet TDM / Non-motorized investment targets. Please note that this is not a comprehensive list of projects. For more information see page 77 of the SCAG 2025 TIP Guidelines.
Non-Reportable TCM	Projects that are insignificant TCM. Projects such as bus stop improvement, bicycle facility less than 1-mile, intelligent transportation systems with fewer than 3 traffic signals, bike parking facilities/expansion of bus or rail station with 9 or fewer bike lockers, etc. For more information see page 87 of the SCAG 2025 TIP Guidelines.
Non-Reportable TCM Committed	Project becomes a non-reportable TCM committed once funds have been programmed for ROW acquisition or for post design implementation in the first two years of the prevailing FTIP or FTIP amendment.
TCM	Transportation Control Measures (TCMs) are specific transportation projects and programs committed to help improve air quality. TCMs are required in non-attainment areas that are classified as severe and above. These provide multiple benefits, including emissions reduction and mobility/accessibility improvements. In the SCAB, three main TCM categories are: transit and non-motorized modes, HOV lanes and their pricing alternatives, and information-based strategies. This is not a comprehensive listing of TCM projects. For more information see page 82-92 of the SCAG 2025 TIP Guidelines.
TCM Committed	Project becomes a committed TCM once funds have been programmed for ROW acquisition or for post design implementation in the first two years of the prevailing FTIP or FTIP amendment. Projects with funds programmed for PE only are not committed TCMs.
TCM Substituted	The replacement project may be a new TCM-type project or an existing TCM-type project without any funds programmed in the first two years of the prevailing FTIP.

System

System Type	Description
Local Hwy	Surface streets, arterials, and local roads.
State Hwy	Highways and Freeway network including toll roads.
Transit	Transit systems such as Bus, Rail, Stations, and Operations.

If modeling is not incorporated in the project, the following fields will appear for each of the system types:

If Local Hwy is selected:

- "Road Name" should be filled in with the project's location/local highway.
- "From" and "To" should be filled with the closest intersecting street of the start and end of the project location.

SYSTEM	ROAD NAME	FROM	TO	
Local Hwy ▼	Nohl Ranch Road	S Royal Oak Rd	Cannon St	Map

If State Hwy is selected:

- "Route" must be filled in with the associated Highway. Suffix information is optional (e.g., N, S, E, or W).

- “From” and “To” should be filled with the closest intersecting street of the start and end of the project location.
- “Milepost” includes the start of the project location, end of the project location, and length of the project. The length will automatically populate once “Begin” and “End” are filled in.

SYSTEM	ROUTE	SUFFIX	FROM	TO	BEGIN	END	LENGTH
State Hwy	5		Avenida Pico	San Diego County Line	0.00	3.39	3.39

If Transit is selected:

- Nothing needs to be filled in.

SYSTEM
Transit

If modeling is incorporated in the project, the following fields will appear for each of the system types:

If Local Hwy is selected:

- “Road Name” should be filled in with the project's location/local highway.
- “From” and “To” should be filled with the closest intersecting street of the start and end of the project location.
- “Street Dist.” is automatically populated based on the “From” and “To” fields.
- “Lane # Existed” is the existing number of lanes.
- “Lane # Proposed” is the number of lanes the project will add/subtract.
- “Improvement Desc” should be filled in with a brief description of the change(s) the project will make.
- Toll information is only needed in rare circumstances, contact OCTA if you have questions regarding it.

SYSTEM	ROAD NAME	FROM	TO	
Local Hwy	Nohl Ranch Road	S Royal Oak Rd	Cannon St	Map

STREET DIST	LANE # EXISTED	LANE # PROPOSED	IMPROVEMENT DESC	HOV ACCESS	EGRESS LOC	TOLL \$	TOLL COLLECT LOC	TOLL METHOD
.98	2	3	Adding an additional lane			\$2,000		

[ADD NEW MODELING SECTION]

If State Hwy is selected:

- “Route” must be filled in with the associated Highway. Suffix information is optional (e.g., N, S, E, or W).
- “From” and “To” should be filled with the closest intersecting street of the start and end of the project location.
- “Milepost” includes the start of the project location, end of the project location, and length of the project. The length will automatically populate once “Begin” and “End” are filled in.
- “Lane # Existed” is the existing number of lanes.
- “Lane # Proposed” is the number of lanes the project will add/subtract.
- “Improvement Desc” should be filled in with a brief description of the change(s) the project will make.
- Toll information is only needed in rare circumstances, contact OCTA if you have questions regarding it.

SYSTEM State Hwy	ROUTE 5	SUFFIX	FROM Culver Dr	TO Jeffrey Rd	MILEPOST: 1.00	BEGIN 6.00	END 5.00	LENGTH Map
STREET DIST .98	LANE # EXISTED 4	LANE # PROPOSED 5	IMPROVEMENT DESC Adding an additional lane	HOV ACCESS EGRESS LOC	TOLL \$ \$2,000	TOLL COLLECT LOC	TOLL METHOD	

[ADD NEW MODELING SECTION]

If Transit is selected:

- Input the transit mode based on options in the "Transit Mode" dropdown.
- Other fields only need to be filled in in rare circumstances, contact OCTA if you have questions regarding it.

SYSTEM Transit										
TRANSIT ROUTE Bus	* TRANSIT MODE	STOP LOCATION	STOP	STOP DIST	HEADWAY PEAK	HDW OFFPEAK	FARE \$0	TSF FEE \$0	PARKING \$ \$0	PARK RIDE LOCATION

[ADD NEW MODELING SECTION]

Common Problems

1. Incomplete and unclear descriptions.
2. Conflict in number of lanes and completion years in segmented projects that are broken into phases.
3. Unidentified number and direction of existing and proposed lanes.
4. Missing local match amount.
5. Missing completion dates and environmental document types and dates.
6. Missing or incorrect RTP IDs.
7. Project status should be reviewed and updated.

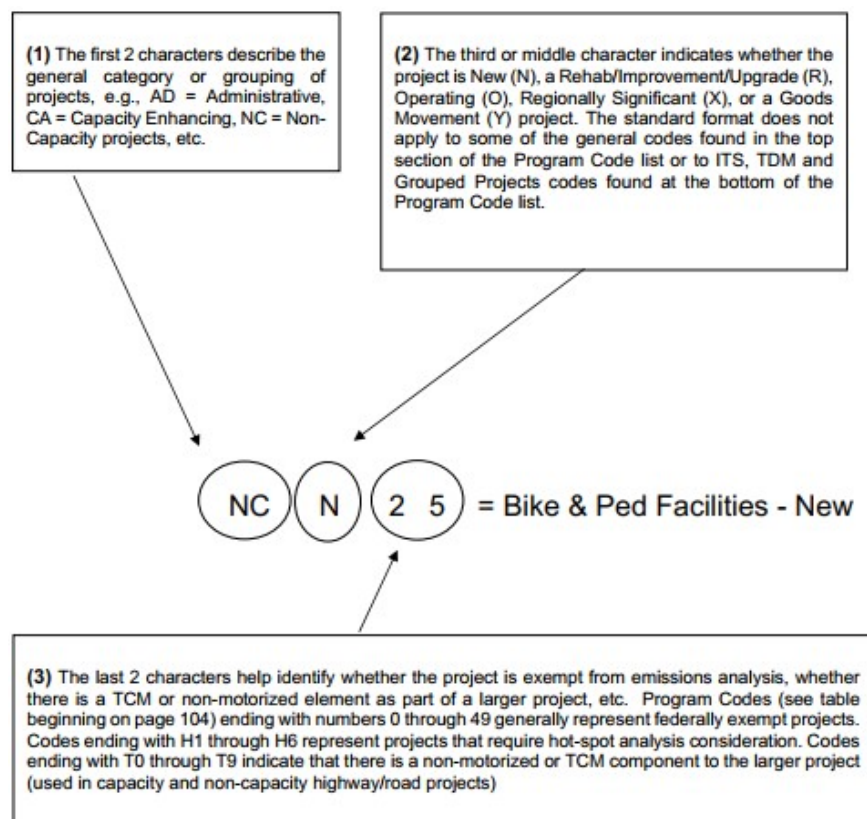
SCAG and OCTA requests that the agencies pay careful attention to these problems.

Federal UZA Listing



LA-LB-Santa Ana	Mission Viejo
Green	Blue
LA-LB-Santa Ana	Mission Viejo
Anaheim	Aliso Viejo
Brea	Dana Point
Buena Park	Laguna Beach
Costa Mesa	Laguna Hills
Cypress	Laguna Niguel
Fountain Valley	Laguna Woods
Fullerton	Lake Forest
Garden Grove	Mission Viejo
Huntington Beach	Rancho Santa Margarita
Irvine	San Clemente
La Habra	San Juan Capistrano
La Palma	
Los Alamitos	
Newport Beach	
Orange	
Placentia	
Santa Ana	
Seal Beach	
Stanton	
Tustin	
Villa Park	
Yorba Linda	

Standard Program Code Format Legend



Common program codes used by Orange County agencies are generally a variation of CA (Capacity enhancing), NC (Non-Capacity Enhancing), PL (Planning), and PA (Paratransit). Please see page 132 in the SCAG 2025 TIP Guidelines for a list of program codes.

First 2 Characters	Third (Middle) Character	Last 2 Characters (4 th and 5 th)
AD = Admin/Admin Facilities AR = Art BU = Bus transit item CA = Capacity Enhancing CH = Child Care CO = Commuter Rail item FE = Ferry Service Item FU = Fueling related IT = ITS project LR = Light Rail Item LU = Conformity exempt Group Projects categories NC = Non-Capacity Enhancing PA = Paratransit item PL = Planning RA = Rail Item SE = Security project	N = New R = Rehabilitation, Improvement or Upgrade O = Operating or Operating Assistance X = Regionally Significant Y = Goods Movement <i>Note: The standard middle character format does not apply to some of the general codes found in the first section of the Program Codes list or to ITS, TDM and Grouped Project codes found at the bottom of the Program Code list.</i>	0 through 49 = Federal Exempt projects (if project is not exempt, such as "add truck lane in urbanized areas", then indicate in the comment section of the OCFundtracker system) H1 through H6 = Six projects that require Hot Spot Analysis consideration T0 through T9 = Larger Hwy/Road projects contain non-motorized or TCM aspects

SH = SHOPP Group Projects TD = Trans. Demand Mgmt. VE = Vehicles TR = Transit project that applies across modes		
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Common Fund Sources

FEDERAL

ATP - ACTIVE TRANSPORTATION PROGRAM
CMAQ - CONGESTION MITIGATION AIR QUALITY
HBRR-L - BRIDGE - LOCAL
HSIP - HIGHWAY SAFETY IMPROVEMENT PROGRAM
STPL-R - STP LOCAL - REGIONAL
5307 - FTA 5307 UZA FORMULAR
5310 - FTA 5310 ELD AND DISABI
5337 - FTA 5337 STATE OF GOOD REPAIR
5339 - FTA 5339 ALTERNATIVES ANALYSIS

LOCAL

CITY - CITY FUNDS
ORAFWY2 - ORANGE M2 FREEWAY
ORAM2RC - ORANGE M2 REGIONAL CAPACITY
ORAM2TR - ORANGE M2 TRANSIT

STATE

ATP - ACTIVE TRANSPORTATION PROGRAM
SB1 LOCAL PARTNERSHIP COMPETITIVE FUNDS
SB1 LOCAL PARTNERSHIP FORMULA FUNDS
SB1 STATE OF GOOD REPAIR
SB1 Solutions for Congested Corridors (SCCP)
SB1 TRADE CORRIDOR ENHANCEMENT ACCOUNT
SHOPPAC - SHOPP - ADVANCE CONSTRUCTION
STCASHR - STATE CASH - RIP
STCASHS - STATE CASH- SHOPP

Commonly Used Terms

Term	Definition
CTC	County Transportation Commissions, i.e., OCTA
FTIP/TIP	Federal Transportation Improvement Program
MPO	Metropolitan Planning Organization, i.e., SCAG
SCAG	Southern California Association of Governments
TIP Adoption/Carry-Over	Happens every 2 years and is the start of a new TIP cycle.

TIP Amendment	Occurs monthly and is either a formal amendment or an administrative modification. TIP amendments make changes to the project list submitted in the initial base TIP adoption
UZA	Urbanized Areas established by the federal government
PPNO	Planning Program Number
TIP ID	The ID number associated with the project in the TIP database. Usually something like "ORA123456"
EA	Project Number/Expenditure Authorization
Env Doc	Environmental Document
SCAB	South Coast Air Basin, the air basin designated to Orange County. Determined by the California Air Resources Board (CARB)
FHWA	Federal Highway Administration
FTA	Federal Transit Administration
PE (PA&ED/PS&E)	Project Approval & Environmental Documentation / Plans, Specifications & Estimates.
ROW	Right of Way/Acquisition
CON	Construction
TCM	Transportation Control Measures. Some projects are TCM's, meaning their completion dates cannot be modified in the first two years of the TIP.
ATP	Active Transportation Program. ATP projects require additional information regarding project attributes
CMP	Congestion Management Plan