APPENDIX C

Technical Inputs Solicitation Policy Guide, Instructional Guide, and Instructional Guide Addendum

Fiscal Year 2026-2029 Transportation Improvement Program

National Capital Region
Transportation Planning Board

The TPB's Long-Range Transportation Plan and Transportation Improvement Program: Technical Inputs Solicitation

Instructional Guide for Submission of Inputs by Implementing Agency Staff

Updated May 22, 2023

National Capital Region
Transportation Planning Board

THE VISUALIZE 2050 LONG-RANGE TRANSPORTATION PLAN AND FY 2026–2029 TRANSPORTATION IMPROVEMENT PROGRAM

TECHNICAL INPUTS SOLICITATION: INSTRUCTIONAL GUIDE

February 2023

Recipients:

This document is intended for use by technical staff from the following TPB member agencies:

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District Department of Transportation (DDOT), Washington Metropolitan Area Transit Authority (WMATA)

Suburban Maryland
Maryland Department of Transportation (MDOT), State Highway Administration (MDOT SHA), Maryland Transit Administration (MTA), Maryland Transportation Authority (MDTA), Charles County Department of Public Works, Frederick County Department of Public Works, Montgomery County Department of Transportation, Prince George's County Department of Public Works and Transportation

Northern Virginia
Virginia Department of Transportation (VDOT), Virginia Department of Rail and Public Transportation (VDRPT), Virginia Railway Express (VRE), Potomac and Rappahannock Transportation Commission (PRTC), Arlington County Department of Environmental Services, Fairfax County Department of Transportation, Fauquier County Department of Community Development, Loudoun County Department of Transportation and Capital Infrastructure, Prince William County Department of Transportation, City of Alexandria Department of Transportation and Environmental Services

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TABLE OF CONTENTS

1: INTRODUCTION

This document is intended to serve as an instructional guide and technical resource for staff from the implementing agencies of TPB member jurisdictions during the development of the next update to the region's long-range transportation plan (LRTP), Visualize 2050 and the FY 2026–2029 Transportation Improvement Program (TIP). It provides an overview of the process used by TPB and its member agencies to solicit technical inputs for these two federally required documents. When either of these documents are updated, the federal government requires the TPB to conduct an in-depth analysis to ensure projected emissions generated by users of the region's future transportation system will not exceed (or "conforms to") the air quality emissions budgets set forth in the region's air quality plans. This is known as air quality conformity. Based on the results of the analysis, a determination is made to confirm conformity.

Additionally, whenever the LRTP is updated (at least every four years by federal law), the TPB must develop a financial plan to demonstrate that the region's implementing agencies can afford to build out, maintain, and operate the proposed projects, programs, and policies in the plan, while continuing to maintain and operate the existing transportation system in a state of good repair.

This document provides 1) a brief overview of the plan and TIP update, 2) a comprehensive guide to the requirements of the technical inputs solicitation process, 3) a schedule for developing Visualize 2050 and the FY 2026–2029 TIP with additional information on amending and modifying the plan and TIP, and 4) detailed instructions for submitting project and program data using the TPB's Project InfoTrak database application.

Visualize 2050 and the FY 2026–2029 TIP

The TPB approved the 2022 Update to Visualize 2045, its current plan and the FY 2023-2026 TIP on June 15, 2022. The federal agencies approved the conformity determination for the plan and TIP on August 25, 2022. Through Resolution R19-2021, the TPB directed its staff to initiate an update to the plan with a target completion date of 2024. In response to this resolution, one of the major activities for the development of Visualize 2050 and the FY 2026-FY 2029 TIP is the use of a zero-based budgeting approach for this Technical Inputs Solicitation, and consideration of scenario study findings to inform the solicitation.

Using a zero-based budgeting approach means that the TPB will work with sponsoring agencies to re-examine/re-submit all projects, programs, and policies for the plan and TIP update. Specifically, the intent is to enable the submissions to better reflect TPB planning priorities, be more aligned with the TPB's enhanced policy framework, be more reflective of TPB scenario findings and more responsive to other findings from related TPB analysis. Documents that the TPB sponsoring agencies should review and consider prior to resubmitting their technical inputs are described and linked in the [Technical Inputs Solicitation: Policy Guide].

A subset of project inputs will be exempt from re-examination in the zero-based budgeting process. This subset includes projects that:

- are under construction, or
- have been funded for any phase with any source: federal, state, local, private, etc., or
- will be funded using money that is "available and committed" (i.e., programmed in the first two years of the TPB's approved TIP or an agency's own approved budgetary document through FY 2024).

Technical Inputs Due Dates

The required analysis of this plan and TIP adoption will take about a year to complete. With time for review by staff from implementing agencies, the public, the TPB, and other stakeholders, the plan and TIP are scheduled for approval by June 2025. Therefore:

- The technical inputs for the air quality conformity analysis (AQCA) of the plan and TIP must be submitted by **December 29, 2023.**
- Project and funding inputs for the FY 2026–2029 TIP and any required documentation of the Congestion Management Process (CMP) must be submitted by **January 26, 2025.**

2: THE TECHNICAL INPUTS SOLICITATION PROCESS REQUIREMENTS

This section details the information that is required from each implementing agency as a part of the Technical Inputs Solicitation process for the air quality conformity analysis of the LRTP and TIP. A supplemental document to this guide will be provided in early 2024 that focuses specifically on inputs to the FY 2026–2029 TIP.

The initial inputs phase can be broken down into 4 steps required of agency staff and TPB staff:

- **Step 1. Financial Plan and Fiscal Constraint Analysis:** Agencies submit updated projected revenues and estimated expenditures to expand, operate, and maintain the region's transportation system through 2050.
- **Step 2. Review and Update Existing Projects and Air Quality Conformity Inputs:** Agencies review and update existing LRTP and TIP project records that were included in the conformity analysis of the 2022 Update to Visualize 2045 and the FY 2023-2026 TIP.
- **Step 3. New Projects and Additional Air Quality Conformity Inputs:** Agencies add new projects, programs, and policies to be included in inputs to the conformity analysis before they are approved. TPB staff add operational and transit service details, population, land use, and other data to be included in the conformity analysis.
- **Step 4. FY 2026–2029 TIP Development, PBPP, and CMP Documentation Review:** Following development of their draft Statewide Transportation Improvement Programs (STIPs) and/ or annual budgets for the next fiscal year, agencies provide inputs to the FY 2026–2029 TIP. No new conformity-related projects may be submitted at this time. TPB staff will review the inputs and coordinate with agencies to ensure that any required documentation of the CMP is up to date.

Note: this Instructional Guide will focus primarily on the technical inputs for the AQCA of the plan and TIP (Steps 1 – 3). A supplement to this document will be provided in early 2024 when development of the new TIP begins.

Step 1. Financial Plan and Fiscal Constraint Analysis

In this step, TPB member agencies are required to submit updated projected revenues and estimated expenditures. Federal metropolitan planning regulations require MPOs to develop a financial plan that demonstrates how the adopted LRTP could be implemented given revenues that are "reasonably expected to be available." "Financial constraint" or "fiscal constraint" is the analysis performed to demonstrate that the forecast revenues which are reasonably expected to be available through 2050 will cover the estimated costs of adequately maintaining, operating, and expanding the highway and transit system in the region through that same timeframe.

The financial analysis for Visualize 2050 will build on work done for the 2022 update of Visualize 2045, with five additional "out" years to the 2050 horizon.

The financial analysis work plan has two components. Member agencies will need to provide: 1) high-level, “top-down” projections of revenue and expenditures (by type); and 2) a “bottom-up” review and update of project costs in the Project InfoTrak (InfoTrak) database to reconcile project costs with the high-level projections. This project cost review will take place in tandem with the submission of all projects into InfoTrak in Spring 2023. Other financial analysis work includes a compilation of costs for transit services.

The financial element will be finalized as part of the Visualize 2050 LRTP when submitted for approval by the TPB.
For additional instruction on submitting data for the financial plan, please see the **Visualize 2050 Financial Analysis Work Plan Memo** included in Appendix A of this document, or contact TPB staff member, **Eric Randall**.

Schedule for Financial Analysis

- **October 2022 – February 2023;** Phase 1: High-Level Revenue and Expenditure Projections
- **June 2023 – January 2024**; Phase 2: Initial Analysis Results and Project InfoTrak Database Project Cost Review
- **January – April 2024**; Phase 3: Reconciliation and Preliminary Analysis Results
- **May 2024 – January 2025;** Phase 4: Final Revisions, Report Production

Step 2. Update Existing Projects and Air Quality Conformity Inputs

For the next stage of the Technical Inputs Solicitation process, staff from each agency are required to re-enter data for all projects that the agency wishes to submit for inclusion in the air quality conformity analysis. This includes all conformity-related projects and programs that were approved as a part of the 2022 Update to Visualize 2045 and the FY 2023–2026 TIP.

Over the course of their history, many project records have become outdated, redundant, misaligned, or cluttered with technical jargon. The intent of this exercise is not to simply copy-and-paste data from previous project records by rote, but to apply a critical review of the information provided in each record, make corrections where needed, and provide better information where available.

This step will begin when TPB staff provide each agency with a set of all LRTP and TIP project records that are included in the Air Quality Conformity Analysis Inputs table for the 2022 Update to Visualize 2045 and the FY 2023-2026 TIP. These records will be divided into two lists, a Green List of funded/committed projects, and an Orange List of developmental stage projects. Following consultations between relevant jurisdictions’ TPB members, implementing agency staff, and TPB staff, each agency should have a list of projects to be submitted for inclusion in Visualize 2050 LRTP and FY 2026–2029 TIP, projects that have been completed since the approval of the inputs to the last plan and TIP update, and possibly projects that are to be withdrawn from the LRTP or TIP.

Agencies will use the TPB’s Project InfoTrak database application (also referred to as “InfoTrak” in this document) to update every project from the currently approved plan and TIP by taking one of three actions:

1. Review and re-enter all information for projects the agency wishes to resubmit for inclusion in the LRTP or TIP,
2. Re-enter the basic required information for projects that have been completed since the approval of the inputs to the conformity analysis and the mark project as well as any associated conformity records as complete, or
3. Re-enter the basic required information for projects that the agency does not wish to resubmit with their inputs and mark the project and any associated conformity records for withdrawal.

Please use the guidelines that follow when reviewing and re-entering project information. Complete instructions for these actions can be found in section 4 of this document: Using Project InfoTrak.

The goal at the end of this step of the Technical Inputs Solicitation process is to have thoroughly vetted and accurate LRTP, TIP, and air quality conformity data for the projects and programs that constitute the foundation of our region's long-range transportation plan, a majority of which are funded and committed.

Guidelines for Project Submissions

It is the responsibility of implementing agency staff to re-enter data in all fields for each project or program record. When reviewing and updating project records, TPB staff requests that agencies adhere to these guidelines:

a) Projects that have been identified as components of a larger "Overarching Project" as a part of the record batching exercise should indicate this in the Project Information section of the form (see the instructions in Chapter 4 of this document).
b) Check for redundancy; if a project record is duplicative in whole or in part to another LRTP or TIP record, either adjust the scope or submit one of the records for deletion.
c) Project titles must be edited to remove the annotations and the project title, limits, descriptions, and conformity records should all be consistent with one another.
d) To the extent possible, project titles and descriptions should be provided in plain English and avoid use of technical jargon. If special terminology is required in the title, consider placing it parenthetically at the end of the title.
e) Project descriptions should be succinct and consistent with the title, limits, and any conformity records. Do not use the description field to provide a listing of segment implementation statuses.
f) Completion years provided in the Conformity records section must be consistent with those provided in the Scheduling Information section.
g) The Total Project Cost for LRTP and TIP projects should accurately reflect the scope of work described and should not include funding for any phase or segment described in another LRTP or TIP project record.

Instructions for editing all fields, saving records for continued editing, and submitting records once finished are found in the **Using Project InfoTrak** section of this document.

Step 3. New Project & Additional Air Quality Conformity Inputs

Once agencies have demonstrated that the existing and planned roadway and transit system can be built, operated, and maintained in a state of good repair, agencies may present new projects to be included in the LRTP. Agencies will not be able to begin adding new records in Project InfoTrak until all InProgress records have been filled in and submitted for inclusion in the air quality conformity analysis or submitted as complete or withdrawn.

For each regionally significant project submission, agencies must provide complete project details, including locations and limits, descriptions, cost and revenue estimates in year of expenditure dollars, completion dates. Agencies must also identify and describe what federal and regional policy considerations the investments address.

What is a 'Regionally Significant Project'?

In order to meet federal guidelines, the TPB defines it as:

1) Any project on a facility that is included in the coded regional network that adds or removes at least one continuous vehicular lane from one major road to the next, or adds a new access/egress location or capacity; or
2) Any transit project that adds or modifies fixed-guideway transit facilities (heavy rail, light rail, streetcar, bus rapid transit)

Additional Air Quality Conformity Inputs

A number of other inputs that are required needed to perform the Air Quality Conformity Analysis. This data is gathered by TPB staff with help from local, state, and other agencies. *These inputs are not directly required as part of this solicitation*

PROJECT INPUTS FROM NEIGHBORING MPOS

These include projects that are in jurisdictions in the TPB Modeled Area from the Baltimore Regional Transportation Board, the Fredericksburg Area Metropolitan Planning Organization, and the Calvert-St. Mary's Metropolitan Planning Organization long-range transportation plans.

BASE-YEAR TRANSIT ASSUMPTIONS

Route and schedule information for existing train and bus systems

TOLL AND FARE UPDATES

Existing toll and fare policies and usage, including toll collection methods, facility use by vehicle type, and hours of operation.

NON-TRAVEL RELATED EMISSIONS MODEL INPUTS

Air temperature and humidity, fuel formulation, and inspection and maintenance program.

LAND-USE FORECASTS FOR THE MODELED AREAS

Population and employment forecasts for the TPB Planning Area and jurisdictions outside the TPB Planning Area but within the TPB Modeled Area, including the Baltimore, Fredericksburg, and Calvert-St. Mary's metropolitan areas and Charles County (MD), Clark and Fauquier counties (VA), and Jefferson County (WV).

VEHICLE REGISTRATION INFORMATION

Make, model, and year of all registered vehicles, used in the calculation of mobile emissions in the region.

OTHER SPECIALIZED TRIPS

Estimates of external trips, through trips, and specialty-generator trips (e.g., for major sporting events).

Step 4. Development of the FY 2026–2029 TIP, PBPP, & CMP Documentation Review

For the purposes of the conformity inputs, TPB staff presume that every project with conformity data that is programmed in the current TIP of record will carry over into the new TIP. These projects are shown in the "In Progress TIP" listings when users begin their inputs. Any records that agencies submit as complete or withdrawn during this inputs process will be removed from the draft data once the plan and TIP are approved in June 2025. Those records that remain will be included in the FY 2026–2029 TIP document. Please note that this does not and will not commit the agency to program funding.

A second set of projects that do not have any conformity impacts will need to be carried over from the FY 2023-2026 TIP to the new TIP once development begins in early 2025. A supplement to this document with complete instructions will be made available at that time.

Congestion Management Process Documentation Review

The CMP must consider congestion and congestion management strategies directly associated with Plan projects. Requested as a part of this Technical Inputs Solicitation is documentation of any project-specific information available on congestion that necessitates or impacts the proposed project. Submitting agencies are asked to cite whether congested conditions necessitate the proposed project, and if so, whether the congestion is recurring or non-recurring.

For any project providing a significant increase to SOV capacity, it must be documented that the implementing agency considered all appropriate systems and demand management alternatives to the SOV capacity. This requirement and its associated questions are substantially unchanged from what has been requested in recent years. A special set of SOV congestion management documentation questions must be answered for any project to be included in the Plan or TIP that significantly increases the single occupant vehicle carrying capacity of a highway.

Performance-Based Planning and Programming

Federal transportation legislation has put forth seven National Goals for Performance-Based Planning and Programming (PBPP):

1) **Safety**
2) **Infrastructure Condition**
3) **Congestion Reduction**
4) **System Reliability**
5) **Freight Movement and Economic Vitality**
6) **Environmental Sustainability**
7) **Reduced Project Delivery Delays**

These goals mirror the goals in the TPB Vision and other regional policy documents.

Following federal regulations on PBPP, a set of measures and targets were developed and approved in 2018 by the TPB for Visualize 2045 for the following areas:

- **Highway Safety Performance**
- **Pavement and Bridge Condition Performance**
- **Highway System Performance**
- **Congestion Mitigation and Air Quality Program Performance**
- **Transit Asset Management Performance**
- **Transit Safety Performance**

PBPP documentation has been a part of the last three TIP documents. The Performance-Based Planning and Programming section of the TIP documents provide analysis of the number of projects and amounts of funding using specific sources that pertained to each performance area.

During the development of the Visualize 2050 and the FY 2026–2029 TIP, agencies will be asked to provide additional information about projects that are aimed at improving these performance areas that may use funds outside of the sources traditionally associated with those goals. For instance, a project designed to increase safety may use National Highway Performance program rather than the Highway Safety Improvement program funding, but these investments should still be captured. Further instructions on providing this data will be included in the 2024 supplement to this document.

3: AMENDING THE LONG-RANGE PLAN AND TIP

Federal regulations require that an MPO update its LRTP and TIP at least every four years. The TPB follows the four-year cycle for its LRTP but updates its TIP every two years. Because an update to either document will require a new determination of air quality conformity, the TPB includes an amendment to the LRTP when it updates the TIP between plan updates. The primary difference between updates and amendments to the LRTP is that the TPB does not develop a new financial analysis of the plan for an amendment.

Guidelines for Scheduled and Unscheduled Plan Amendments

The current plan and TIP of record were approved by the TPB in June 2022 which would have required the next four-year update to be complete by 2026. The TPB's decision to develop a new LRTP update, complete with a new financial analysis by 2025, effectively reset the four-year clock. Following approval in 2025, Visualize 2050 will be the plan of record until it needs to be amended in conjunction with the FY 29-31 TIP, and then ultimately updated in 2029.

In the off-years between the approval of long-range transportation plan and TIP updates, agencies may, in consultation with TPB staff, determine that an off-cycle amendment and conformity analysis is required to include one or more new, high-priority projects in the plan and TIP. There will not be a new solicitation document provided for any off-cycle amendments, and the requesting agency will be responsible for covering the cost of the additional staff time needed to produce the conformity analysis.

Funding for any new projects submitted during an interim TIP update or an off-cycle amendment must be accounted for in the financial analysis of the most recently approved LRTP or the submitting agency must submit a detailed financial plan, indicating any new funding sources that will be used to pay for construction, operations, and maintenance of the project(s).

Guidelines for Amendments and Modifications to the TIP

In stark contrast to the LRTP, the TIP is usually amended and modified on a monthly basis throughout its two-year lifespan. See Appendix B for definitions, complete guidelines, and schedule for submitting amendments and administrative modifications to the TIP. Projects that are included in a request for an amendment or modification to the TIP must be either included in the most recent air quality conformity analysis or be exempt from the air quality conformity requirement.

Administrative modifications to the TIP are usually smaller in scale than amendments and may be requested during specified TIP Action periods provided in the schedule in Appendix B. Modifications can be approved by TPB staff typically within two business days.

Amendments to the TIP are usually reviewed and approved by the TPB Steering Committee at their monthly meetings. Some amendments may need to be elevated to the full TPB for approval and may even require a 30-day comment period. This typically happens when a project is of a high-profile nature, or when an agency is updating project and funding information for all projects across the span of the TIP. The latter example would also require a 30-day public comment and interagency review period.

4: ADOPTION OF VISUALIZE 2050 AND THE FY 2026–2029 TIP

CY 2023	**January**	• TPB receives draft of 2024 LRTP Update Technical Inputs Solicitation document for review
	February	• The TPB releases the Technical Inputs Solicitation document to initiate the Call for Projects • Training for member agency staffs in using TPB's Project InfoTrak tools for input
	March - December 2023	• Financial analysis continues, including updates to project cost estimates in InfoTrak • TPB member agency technical staff continue and complete re-examination of current projects and propose new projects for inclusion in Visualize 2050 • TPB staff will continue to assist TPB members and member agency staff, including facilitated meetings, as necessary, to discuss potential inputs to Visualize 2050 • **TPB staff continue accepting and sharing public comments on Visualize 2050 project inputs with TPB members and their transportation agencies** • TPB member agency technical staff will input technical information into Project InfoTrak • TPB staff continues financial analysis (to be completed by December 29, 2023)
CY 2024	**January – February 2024**	• Preliminary LRTP update inputs due December 29 for Air Quality Conformity (AQC) analysis • **Staff will review and compile the conformity table showing changes. Staff to send draft table with changes to agencies for review on February 1. Agencies to provide corrections by February 15** • **Final project inputs for the LRTP and Air Quality Conformity (AQC) analysis due to TPB staff for presentation in comment period documentation (February 15)** • TPB staff will reconcile draft financial analysis results and produce preliminary financial plan to reflect project submissions
	March 2024	• Technical Committee will review the draft financial plan; projects proposed for inclusion in the conformity, and the draft AQC scope of work • **The TPB will receive a briefing on the draft inputs to the plan/AQC analysis and the draft AQC scope of work and the draft financial plan** • Public comment period (March 1-30) on inputs to the plan/AQC analysis, and AQC scope of work
	April 2024	• TPB receives summary of public comments on draft inputs to the plan and AQC analysis; agencies sponsoring the projects will have the opportunity to discuss and advise staff on responses • The TPB will review responses to comments and updates to inputs to the plan and scope of work for the AQC
	Early 2024	• EPA anticipated to find new MVEBs in the updated 2008 ozone maintenance plan adequate for us in AQC analyses
	May 2024	• TPB asked to accept comments and approve inputs and scope, authorizing staff to begin analysis • Continue financial analysis: (May 2024-March 2025) final revisions, report production
	May 2024	• TPB staff commence Air Quality Conformity technical analysis
CY 2025	**Winter 2024**	• **Transportation Improvement Program (TIP) inputs due for the FY 2026–2029 TIP Jan. 26, 2025** • TPB staff complete Air Quality Conformity technical analysis and draft report • TPB staff complete financial plan: final revisions, report production • TPB staff draft performance analysis for the plan and TIP
	April 2025	• TPB Technical Committee, MWAQC, and MWAQC TAC reviews draft plan and TIP, and draft results of AQC analysis for the updated plan and FY 2026–2029 TIP during their meetings • **Public comment period on the plan, TIP, and the results of AQC analysis determination for the updated plan and FY 2025-2028 TIP from April 1 – April 30** • TPB receives briefing on draft results of the AQC analysis for the plan and TIP
	May 2025	• TPB receives summary of the comments received on the analysis, plan and TIP; the agencies sponsoring the projects will have the opportunity to advise staff on responses to comments
	June 2025	• The TPB will be asked to approve the results of the AQC analysis and adopt the updated plan and the FY 2026 – 2029 TIP

5: GETTING TO KNOW PROJECT INFOTRAK

This section provides an overview of Project InfoTrak, its data model for records in the LRTP and TIP, and some basic terminology that will help users understand how to use the application to locate, update, and submit their project and program information.

Project InfoTrak (or "InfoTrak") is the database application used by TPB staff to gather detailed project information from TPB's implementing agencies. InfoTrak collects information for the LRTP, the TIP, the air quality conformity analyses of those documents, documentation of the Congestion Management Process, for verifying financial constraint of the plan and TIP, and for reporting on federal obligations of funds in the TIP.

A variety of user roles in the system empowers a wide swath of local, state, regional, and federal stakeholders with the ability to access and review the same project and program data. InfoTrak reduces redundant processes and increases transparency for all users.

Project InfoTrak is provided as a software as a solution (or SAAS) platform by the TPB's consultant partner, EcoInteractive, Ltd. EcoInteractive provides customizations to meet TPB and member agencies' needs, as well as continuing platform upgrades, new modules, and technical help desk support for staff from both the TPB and member agencies.

Project InfoTrak Database Structure and Nomenclature

Both the data structure and the software features in Project InfoTrak have a bearing on how relationships between the projects in the LRTP and the TIP are described. This section provides a guide to the data relations and terminology used by InfoTrak.

Relationship Between LRTP and TIP Records in Project InfoTrak

This section provides an overview of InfoTrak's database structure and how the relationship between LRTP and TIP records meets federal requirements, what happens when a project transitions from the LRTP into a TIP record, and how individual LRTP and TIP project records can be related to each other and one another using InfoTrak's features.

The TIP Is Part of the LRTP

The TIP is often described as the implementation of, or the first four years of the LRTP. Federal law requires that for a project to be in the TIP, it also must be included in the LRTP.

In Project InfoTrak, the LRTP and TIP records all carry with them the same data points (the only difference being the Programming Information section of the LRTP form requires fewer details regarding funding). Since the TIP form contains all the same data points as the LRTP form, the requirement that any TIP project is included in the long-range plan is met. A project should not have both an LRTP record and a TIP record that describes the same scope of work, nor any sub-component thereof. Any record describing a project or subcomponent of a project must be discrete and exclusive of any project or component described in another record.

Moving from the LRTP to the TIP

If the entire scope of an LRTP project becomes ready to be programmed in the TIP, the record should be converted from an LRTP record to a TIP record (see instructions in the next section). This action will create a duplicate of the LRTP record with a new TIP ID and Programming Information section for detailed TIP funding data. It will also edit the LRTP record to indicate that it was converted and submit the record for archival.

If a subcomponent of an LRTP record needs to be broken out and included in the TIP, the data entered into each record must be mutually exclusive. When a new TIP record is created for a break-out project, the LRTP record from which it is being extracted must be updated to exclude the scope of work described in the new TIP record. The project title, limits, description, and cost of the updated LRTP record should reflect the revised limits and reduced project cost, which are now accounted for in the TIP record, After this, changes to the TIP project record only need to be reflected in the original LRTP record if more of the scope of work is being amended into the TIP. For more guidance on breakout project components, see the section on Total Project Cost in **Appendix B**.

Introducing Overarching Projects

To support the zero-based budgeting process for moving projects into the LRPT and TIP, TPB staff are introducing a new concept of "over-arching projects." These are groups of LRTP and TIP project records that are geographically and/or temporally proximate, and interrelated. This section provides more detail on how overarching will be used and managed in Visualize 2050 and in Project InfoTrak.

Note: Use of the word "group" as found in this section should not be confused with the practice of grouping projects in the TIP. Federal regulations allow state DOTs to group smaller scale projects that are not regionally significant together in the TIP by project type (e.g., roadway resurfacing or reconstruction, safety, transit asset maintenance, etc.) so that funding is easier to access as projects become ready to implement. To differentiate from the practice of grouping TIP projects, TPB staff use the term "over-arching projects" to describe the collections of LRTP and TIP project records discussed in this section.

Staff recognize that agencies need to break some projects down into smaller segments or phases for various reasons, and those break-out segments need to be managed distinctly in Project InfoTrak. Unfortunately, this has often made conversations about the larger projects somewhat obscure as we focus on the pieces described in separate project records. To make "bigger picture" projects easier to discuss and understand, TPB staff, agencies, and localities carried out an exercise to "batch" some project records together to form overarching projects in late 2022.

Overarching Projects and Project InfoTrak

Data on these overarching projects will be maintained in Project InfoTrak. Each overarching project (OAP) record includes a smaller set of data that is meant to provide a high-level summary of its LRTP and/or TIP component projects. Descriptive text fields (Project Title, Description, Facility/ Corridor, From, and To) for each OAP record are manually entered, while the remaining fields (Cost, Completion Year, Jurisdiction, and ZBB-Exempt Status) are populated automatically based on data from the component projects. Overarching projects must have a record established in InfoTrak before LRTP or TIP project records can be associated with them, therefore, TPB staff recommend making sure that all OPA records are created first. Moving forward, this feature may be used to relate additional or new projects to each other under the existing overarching projects or under new ones. See instructions on **Managing Overarching Projects** on page 14 for further information.

Record Relations and the Project IDs Tab

This section and the corresponding instructions in the next chapter will be updated prior to the beginning of inputs for the FY 2026–2029 TIP.

At the top of every LRTP and TIP record is a set of tabs, the third of which is titled "Project IDs." This tab features several other types of project IDs that may be associated with that project. Currently, these include Federal Aid Project (FAP) numbers, the sponsor agency's internal project identifiers, and LRTP IDs. Once the Project InfoTrak application platform is upgraded (expected summer 2023), the LRTP ID field that currently appears on LRTP project records will be replaced by a field titled

TIP ID(s) At present, the LRTP ID field on the Project IDs tab on any new TIP records created in the amendment process, either as break-out projects from an LRTP record, or as a conversion of an LRTP record, automatically fills in the originating LRTP record's ID. When the platform upgrade is complete, the Project IDs tab on LRTP records will automatically update the TIP ID(s) field to display the project IDs of any breakout TIP project records or TIP records that were converted in whole from that LRTP record.

Nomenclature and Numbering

The structure and functionality of Project InfoTrak also have a bearing on how we talk about certain aspects of updating and amending the LRTP and TIP. This section defines InfoTrak's terminology and plan versioning system.

Updates, Adoptions, and Amendments

Throughout this document and other Technical Inputs Solicitation documents, this process has been referred to as the beginning of an "update" to the TPB's long-range transportation plan. Since the 1960s, federal regulations have required that the TPB follow the "3C" planning process (continuing, comprehensive, and cooperative), and to update its plan at least every four years. In 2025, the TPB will not approve a "new" plan, but rather, it will *continue* the planning process and approve an update to the decades-old original plan.

When the TPB acts in 2025, it will "adopt" a resolution that approves this update to the plan. This is sometimes shortened to say that the TPB "adopts the update of the plan." The term "Adoption" is used within Project InfoTrak to refer specifically to the development and approval cycle of an update to the long-range plan or TIP.

InfoTrak uses the term "Amendment" to refer to any formal approval of changes made to the plan or TIP by the TPB or its Steering Committee (when empowered to do so). For the LRTP, this would include the two-year interim amendment to the plan when the TIP is updated between plan updates and any off-cycle amendments to the LRTP conducted by special request of one or more implementing agencies.

LRTP Cycle Numbering Conventions

To identify successive updates and amendments of the LRTP, Project InfoTrak uses a uniquely assigned "LRTP Action" code number. These are also referred to as "cycles." Visualize 2050, for instance will be the 50-00 cycle, or 50-00 Adoption. The first two digits of this code indicate the horizon year of the LRTP and the last two numbers are the "version" of the plan. In this case, the -00 indicates the initial major update cycle. Presuming no off-cycle amendment is requested in 2025, then the two-year TIP update and LRTP amendment would be designated as LRTP Action 50-01. If an off-cycle amendment is requested, that would be 50-01 and the 2026 interim amendment would be designated 50-02.

TIP Cycle Numbering Conventions

A similar numbering convention is used for identifying cycles of the TIP. The first two numbers in the TIP Action code refer to the first year of the program and the second two refer to the version, with "26-00" indicating the adoption of the FY 2026–2029 TIP and 26-03 would be the third version of the TIP which would include the TIP as initially adopted, plus amendments and modifications approved in 26-01 and 26-02.

For amendments to the TIP, a single digit modifier, separated by a decimal, is appended to the code to indicate to which of the three sections of the TIP and corresponding Statewide Transportation Improvement Program (STIP) the action applies: 26-XX.1 actions to the District of Columbia's STIP, .26-XX.2 actions to Maryland's STIP, and 26-XX.3 to Virginia's.

Administrative modifications approved by TPB staff do not require federal approval for inclusion in a STIP, therefor all modifications will be processed using the same TIP Action code each month.

6: USING PROJECT INFOTRAK

This section provides detailed instructions for using Project InfoTrak to find, enter, and edit project submissions for the inputs to the Air Quality Conformity Analysis of the plan and TIP.

Getting Started: Signing Up for an Account & Logging In

To log in or sign up for an account or to log in to the system, visit www.mwcog.org/PIT. This redirects you to a secure login page. Redirects are blocked by some IT or email systems. If this happens, please set your bookmark to: https://projectinfotrak.mwcog.org/secure/login. To create a new account, follow these steps:

1. Click the link under the orange **LOGIN** button, where the text reads, "**New to Project InfoTrak? CLICK HERE.**"
2. Enter your email address, answer the Captcha, and click "**Submit**. "
3. Complete the user registration form. Note that the password is case sensitive while the username is not.
4. Select your agency name.
5. If you work with editing/adding projects in the LRTP, mark YES for 'Do you need access to LRTP' (this will be most of you).
6. Select user type:
   a. For agency staff entering and editing project information, select SPONSOR.
   b. For federal review agency members, select FED FHWA or FED FTA
7. Once the system receives your Project InfoTrak User Account request, an automated email will be sent for verification. ***New users will not have access to InfoTrak until they receive the email described in the next step.***
8. Your user account must be granted access by an Administrator. ***Once approved as a user, Project InfoTrak will send a second e-mail notification and then you can begin to use the system.*** This may take anywhere from a few minutes to the next business day, depending on the time of the request.

Managing Overarching Projects

As noted in the Nomenclature section on page 12, overarching projects (OAPs) are groups of LRTP and TIP project records that are geographically and/or temporally proximate, and interrelated. To assign records to an overarching project, users must first create an overarching project entry. This is done by going to "Other Tools" in the top menu and then clicking on "Manage Overarching Projects". Click on the text link labeled "Create New" on the top right of the page.

From here, the user will be asked to fill out some information on the OAPs including an ID, project title, sponsor agency, description, the facility/corridor, and from/to. On the bottom of the page are fields that will be automatically filled in once project records are linked to the OAP. Those are completion year, ZBB-Exempt Status, Cost, and Jurisdictions.

If an Overarching Project includes component projects from more than one sponsor agency, please select all agencies that apply in the Lead Agency drop-down menu.

Once created, users can continue to edit the OAP from the "Manage Overarching Projects" list. As project records are linked to the OAPs, a list of those records will be viewable through their assigned OAP page along with some of the records' data. To link records to the OAPs, users will need to navigate to the project record and fill out the appropriate fields in the Project Information section. There are three fields related to OAPs: Overarching Project (Yes/No), Overarching Project Name, and ZBB-Exempt Status. Once an OAP is created, it should show up in the Overarching Project Name list.

Submitting Project Data for Existing LRTP and TIP Projects

When agencies begin Step 2 of the Technical Inputs Solicitation process, users will find that the Project ID, record version number, and project title are the only field that have been carried over for all conformity-related records from the currently approved LRTP and TIP. Links to these two lists of projects can be found under the "In Progress Adoptions" panel (Fig. 1) in the upper-right corner of the dashboard on the InfoTrak home page.

Figure 1: In Progress Dashboard Panel

In Progress Adoptions
TIP Adoption/LRTP Adoption
17 In Progress (TIP)/25 In Progress (LRTP)
0 In Denied (TIP)/0 In Denied (LRTP)

Agencies will need to review and edit every record in both the "**In Progress (LRTP)**" and "**In Progress (TIP)**" lists to complete the submission of their existing projects. TPB staff recommend beginning with project records from the provided "Green List" of funded/committed projects before moving on to records on the "Orange List".

After clicking on one of the two In Progress links, users will see an index list of the conformity-related projects in the currently approved LRTP or TIP. Use the Project ID (LRTP IDs begin with "CE" and TIP IDs begin with a "T") and Project Titles to find the project record you wish to edit. You can use the TIP ID and Project Title column headers to sort and make finding records easier. Click the Project ID to open the record and begin editing.

Projects to Be Included in Visualize 2050 or the FY 2026–2029 TIP

Line-by-line field definitions and instructions follow later in this chapter. When editing each record, please consider both the content Guidelines from page 4 and the technical instructions on the next page.

Identify Overarching Projects

Please remember to fill out the "Overarching Project" fields to link individual project records to overarching projects, where appropriate.

Ensure Project Information and Conformity Records Are Consistent

Conformity Location records will be carried over for each project into the 50-00 and 26-00 Adoption cycles. These location records form the core of the project's scope. Review every conformity record associated with each project record and update as necessary. Make sure that the project's Title, limits, Description, Cost, and Projected Completion are consistent with these records. TPB staff will deny and return any project record to the submitting agency where the descriptive fields and Conformity Location records are inconsistent, or where a conformity location record shows a Projected Completion Date of 2022 or earlier and not marked as complete or withdrawn.

HELP DESK HINT

If a Conformity record needs to be moved to or from another project record, contact TPB staff at PIThelp@mwcog.org.

Update Project Costs

For "Total Project Cost" on LRTP records, provide the cost broken down by estimated revenue source (federal, state, local, private, bond, or other) in year-of-expenditure dollars. Please ensure that costs are consistent with data provided in the financial analysis work done in Step 1 of the Technical Inputs Solicitation. The Fiscal Year and project phase columns will not be used. TPB staff recommend entering 2050 for the FY value and putting funding amounts for each federal, state, local, etc. source in the "Other" column.

Programmed funds from the FY 2023–2026 TIP have been carried over for each TIP project record with related conformity records to facilitate the calculation of Total Project Costs. Hopefully most of these costs are accurate and will not need to be edited. However, if a project cost needs to be changed to match data provided for the Financial Analysis you may add to or deduct from any programmed amount to arrive at the correct Total Project Cost. **Note: this will not impact or change any funding programmed in the FY 2023–2026 TIP, nor will it be portrayed as programming for the FY 2026–2029 TIP.** It is solely for the purposes of deriving a Total Cost for the project. Until development of the FY 2026–2029 TIP begins in early 2025, all reports for TIP projects will suppress the programming section and will only show the Total Cost.

Update Current Implementation Status

Please set the Current Implementation Status field to reflect any updates as necessary. Consider that this status should be accurate as of the "pencils down" moment that inputs to the conformity analysis are due, which is December 29, 2023. If there is a high degree of certainty that the project will be moving on to a new phase by that time, then select the more advanced phase.

Required Fields

Before you can successfully save and/or submit a record, InfoTrak will review the data provided to make sure certain fields have been filled in. To save time and avoid having to wait for the form to review and provide an error message, make sure the following fields all have a value:

- **Project Title**
- **Primary Project Type**
- **System**
- **Location Type** (for both Project and Conformity Information sections)
- **Map –** any project record being submitted for inclusion in the air quality conformity analysis must be mapped on the Map tab
- **Change Reason** – this field may show a value, but it needs to be updated. Select "**Schedule/ Funding/Scope**" and either select "50-00/26-00 Adoption" from the drop-down menu or type "50-00/26-00 Adoption" under "**Other Change Reason"**

Saving and Submitting

When completed, click on the "**Submit for Review**" button on the bottom of the page. If users need to come back to the record later, there is an alternate option to "**Save**". This will create the record in the database without submitting it for review and allows users to return to it later.

For Projects in the Currently Approved LRTP or TIP That Are Complete

Agencies must identify any projects that have been completed since the inputs to the 2022 Update to Visualize 2045 and the FY 23-26 TIP were approved. For completed projects, agencies need not complete the information for every data field. Please enter the project title, limits, and description, then follow these steps to submit the record as complete and ready for archiving:

1. Edit the Project Title to remove annotation.
2. For each Conformity record, change the Improvement Type to "Complete" and enter the appropriate year in "Completed Year."
3. Under Schedule Information, Select "Project Complete" for "Current Implementation Status
4. Select "Complete Project" in the Change Reason section.
5. Click "Save & Submit."

For Projects Being Withdrawn from the Currently Approved LRTP or TIP

If a project record is being withdrawn from the LRTP or TIP, agencies do not need to re-enter data for every field. So that we may list the project as withdrawn, please do edit to include project title, limits, and description, then follow these steps to submit the record as withdrawn and ready for archiving:

1. Edit Project Title to remove annotation.
2. For each Conformity record not already complete, select "Withdrawn" for the "Improvement Type" field.
3. Set the "Current Implementation Status" to "Project Cancel."
4. Select "Delete Project" as Change Reason.
5. Click "Save & Submit." Modifying an Existing Project Record

New Project Record Submissions

To create a new record, users will need to be at the homepage and locate the boxes at the top of the page labeled “In Progress Amendments” or “In Progress Adoptions” (Figure 2). From there, click on the LRTP or TIP Adoption links. This will bring the user to a new page where users will then select the option for “Create New Project”. The next page may ask users to select which action or version of the TIP/LRTP that the record pertains to. At this time, all new projects should be submitted as LRTP projects, so select 50-00.

Figure 2: In Progress Dashboard Panel

In Progress Adoptions
TIP Adoption/LRTP Adoption
17 In Progress (TIP)/25 In Progress (LRTP)
0 In Denied (TIP)/0 In Denied (LRTP)

When filling out the record page, please refer to the detailed form instructions later in this section. As a reminder, please do not forget to fill out the “Overarching Project” field to link individual project records to overarching projects, where it is necessary. When completed, click on the “Submit for Review” button on the bottom of the page. If users need to come back to the record later, there is an alternate option to “Save”. This will create the record in the database without submitting it for review and allows users to return to it later.

7: DETAILED PROJECT DESCRIPTION FORM INSTRUCTIONS

This section provides line-by-line instructions and definitions for fields on the LRTP and TIP project description forms. The data collected for both LRTP and TIP projects is essentially the same, save for the information in the Programming/Cost Information sections, so these instructions apply the same to both documents.

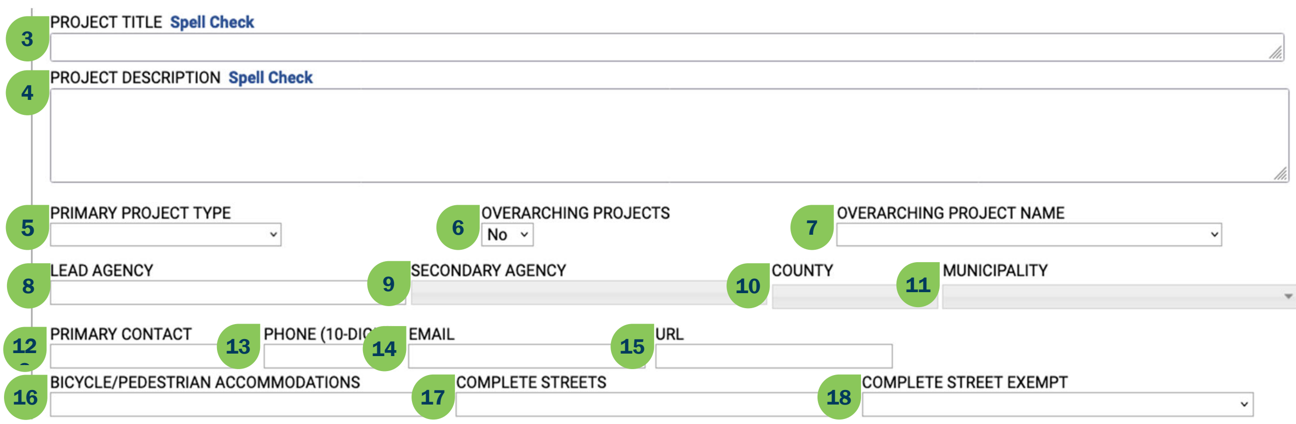
ADMINISTRATIVE AREA

Fields in this section cannot be edited by implementing agency staff.

1. **ADOPTION/AMENDMENT** — **This field indicates the LRTP or TIP cycle in which the project is being submitted. See sections on LRTP and TIP Cycle Numbering Conventions on page 10.**
2. **LRTP ID/TIP ID** — **Unique project ID number assigned to each record upon creation**

Note: *If viewing a TIP record, the field to the right may show an LRTP ID. This indicates either the associated LRTP project from our legacy data system or that the TIP project was created by amending that LRTP project into the TIP. The Agency Project ID can be edited on the Project IDs tab and is useful for associating records in InfoTrak with your own systems.*

PROJECT INFORMATION



3. **PROJECT TITLE** — Provide a brief, public-friendly name for the project
4. **PROJECT DESCRIPTION** — Describe the project as clearly as possible. Use public-friendly phrasing and avoid technical jargon where possible
5. **PRIMARY PROJECT TYPE** — Classify the major purpose or nature of the project using one of the
6. **OVERARCHING PROJECTS** — Select “Yes” to indicate that this record is a component of an Overarching Project
7. **OVERARCHING PROJECT NAME** — If the project is a component of a larger Overarching Project, please select the name from the pull-down menu.
8. **LEAD AGENCY** — The agency that is submitting the project information. This is automatically filled in defined by the user’s agency.
9. **SECONDARY AGENCY** — Other agency working in conjunction with primary agency.
10. **COUNTY**
11. **MUNICIPALITY** — The municipality(ies) in which the project is located. Multiple values may be selected from the dropdown menu.
12. **PRIMARY CONTACT** — Name of project manager or point-of-contact for more information.
13. **PHONE** — Phone number for project manager or point-of-contact for information.

14. **EMAIL** — Email address for project manager or point-of-contact for information

15. **URL** — Website address for additional project information

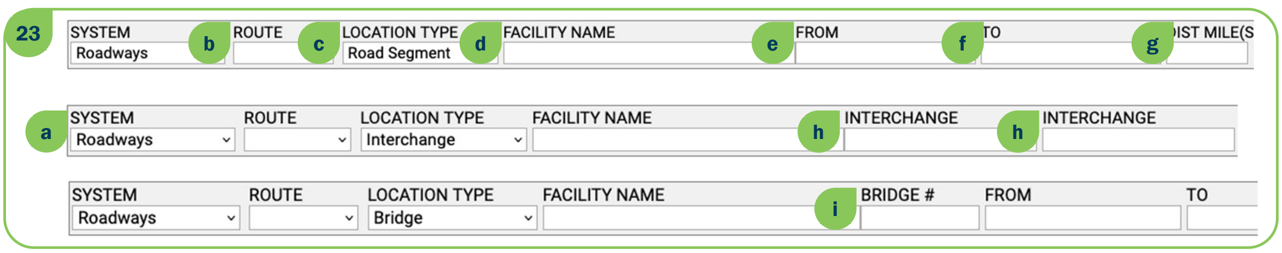
16. **ACCOMMODATIONS** — Check the appropriate box to indicate whether bicycle and/or pedestrian accommodations are:
- Included
- Not Included
- Not Applicable

17. **COMPLETE STREETS** — Use the dropdown menu to indicate if the project:
- Advances the jurisdiction's Complete Streets policy goals
- Not applicable to a Complete Streets policy
- Is exempt from the jurisdiction's Complete Streets policy.

18. **COMPLETE STREET EXEMPT** — If the previous response was "Exempt," use the dropdown menu to identify the reason for its exemption.

LOCATION INFORMATION

Use this set of fields to identify the facility and limits included in the scope of the project. The fields available will change based on the **SYSTEM** selected (several examples of this section are shown below). Use the Conformity Details fields in the next question to define the project for air quality conformity modeling.



SYSTEM — Select from the menu to indicate if the project is on:
- Roadway System (Functional Class 1-3, 5)
- Local Street System (Functional Class 4)
- Transit System
- Non-Infrastructure (None of the above)

The SYSTEM field will dictate the options made available in the LOCATION TYPES menu.

ROUTE — Identify the interstate, U.S., or state highway designation from the dropdown menu. The routes have been prepopulated based on county(ies) selected in field 10. This field only appears when "Roadways" is selected for System.

LOCATION TYPE — Select the best option to describe the project from the list available. The list is filtered based on the System type and will determine the fields that follow on the same line.

FACILITY NAME — Full name of facility; e.g. "Capital Beltway," "East Street" or "Red Line". To the extent possible, this field should be limited to actual street names or transit routes. If the project or program is not road, trail, or transit route-related, the PROJECT TITLE and DESCRIPTION fields will be sufficient to identify the project and this field, along with associated limit fields should not be used

FROM — The beginning project limit or location of a spot improvement

TO — Terminal project limit

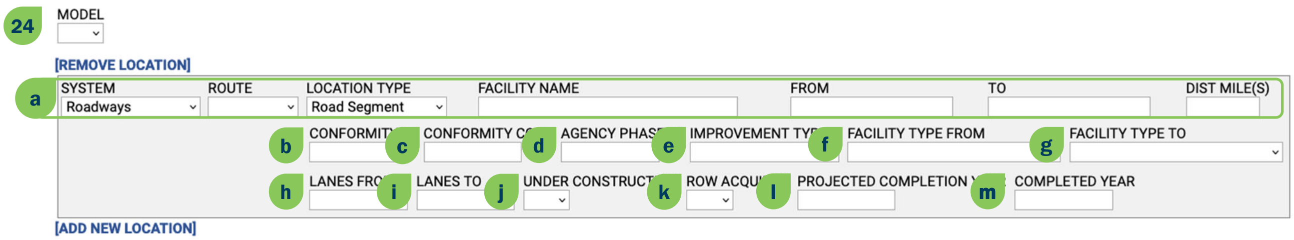
DISTANCE — Distance in miles of the complete project.

INTERCHANGE/INTERSECTION — Use these fields to identify one or more facilities that cross the main facility to form an interchange or intersection

BRIDGE# Use this field to provide the federal or state bridge asset identification number

CONFORMITY INFORMATON

Use this section to provide detailed information on how the project should be coded in the TPB's network for use in the Travel Demand Model. Multiple segment records may be required to distinguish pieces of the project that have different completion dates, improvement types, lane configurations, etc. If you are unsure on whether a project meets the regionally significant criteria for inclusion in the model, please contact **Jane Posey**.



24. **MODEL** Select "YES" to indicate that this project record will have or more Conformity Location records. To add a new Conformity segment, click the **[ADD NEW LOCATION]** link

SYSTEM – DIST MILE(S) The fields on this row behave in the same manner as fields a – i in the Location Information section described above. The **DIST MILE(S)** field does not need to be calculated for these records.

CON ID Automatically generated unique conformity segment identifier. This field is not editable.

CONFORMITY NUMBER A project code assigned by TPB staff that is used for modeling inputs. This field is not editable by agency sponsors.

AGENCY PHASE ID Agencies can use this field to track projects with their own ID systems.

IMPROVEMENT TYPE Pull-down field to identify type of improvement being made to the facility. The following values are available to select from:

FACILITY TYPE FROM Functional class of facility before improvement

FACILITY TYPE TO Functional class of facility after improvement

LANES FROM Number of lanes on facility before improvement

LANES TO Number of lanes on facility after improvement

ROW ACQUIRED Right-of-way has been acquired for the facility

UNDER CONSTRUCTION Construction has begun on the facility

PROJECTED COMPLETION Estimated year that the project will be complete

COMPLETED YEAR Year that the project was completed or implemented visualize 2050

CONGESTION MANAGEMENT PROCESS INFORMATION

This section asks for information about congestion in the project area and determines if a Congestion Management Process (CMP) Documentation form needs to be submitted with the project. The CMP is primarily intended to ensure that alternatives to adding capacity for SOVs have been adequately considered during the study and planning stages before moving forward with construction. Some of the factors that may exempt projects from requiring documentation of the CMP are subject to change (e.g., costs may rise above $10 million; HOV facilities might be converted to HOT, thus allowing SOVs, federal funding might eventually be used, etc.) TPB staff will review data in this section during the development of the TIP to ensure that the exemption criteria indicated in **25b** still hold true for records where **25a** is true.

SPECIAL NOTE:
This section can be deferred until development of the FY 2026–2029 TIP begins. CMP documentation is due by July 26, 2024.

Transit agency users may select "NO" for 24e and move on to the next section.

24 a ☐ Traffic congestion conditions necessitate the proposed project or program and are

b ☐ If the congestion is on another facility, please identify it:

25 a ☐ This project is capacity-increasing and on a limited access highway or other principal arterial

b ☐ The following exemption criteria are true about the project? (Choose one, or indicate that none of the exemption criteria apply)

c CMP

24 a. CONGESTION CONDITIONS	Check the box if the statement is true and select the appropriate response at the end of the statement.
b. OTHER FACILITY	If true, check the box and provide the name of the other facility.
25 a. CAPACITY INCREASING	Check the box if this statement is true. Please note that this is not the same question as whether the project is required to be in the air quality conformity analysis. This statement only applies to those projects on facility types of 1, 2, or 5.
b. CMP EXEMPTION	Check the box next to each true statement about this project. If none of the first six statements are true, check the last box indicating that a CMP documentation form is required. If this box is checked, a new line of text will appear below the next field providing a link to download a blank form. Once completed, the CMP documentation form should be uploaded on the Documents tab at the top of the form.
c. CMP REQUIRED	If **25a** is checked and none of the exemption criteria in **25b** apply, select "YES," otherwise select "NO."

ENVIRONMENTAL REVIEW INFORMATION

This section asks for the status of NEPA documentation and environmental mitigation activities.

26 ENVIRONMENTAL REVIEW DOCUMENT

27 ENVIRONMENTAL REVIEW STATUS

28 ☐ This project has been identified for the following potential environmental mitigation activities.

26. ENVIRONMENTAL REVIEW DOCUMENT	Select the type of NEPA documentation required, if any.
27. ENVIRONMENTAL REVIEW STATUS	Select the current status of any required NEPA documentation
28. ENVIRONMENTAL MITIGATION	Check appropriate boxes to identify any mitigation activities.

PROGRAMMING INFORMATION

This section asks for project funding information. This is the only section of the form that is different for LRTP records and TIP records. For this Technical Inputs Solicitation document, these instructions apply primarily to LRTP records. Instructions are provided on using the TIP Programming Information section are provided solely for the purposes of updating the Total Project Cost. Complete details on programming funds in the FY 2026–2029 TIP will be provided in the supplement to this Instructional Guide in early 2024.

A new addition to this section is the Source Document and Source Document Page/Record Link fields. These will be required fields to be filled out where users will enter which document notes the funding source(s) of each of the records.

LRTP Funding and Total Project Cost

The funding information requested in this section has been simplified from the previous Visualize 2045 instructions. TPB staff are only requesting that the total cost of a project be broken down by source category (federal, state, local, etc.). No data on fiscal years (or bands of fiscal years) or project phasing is required.

[Section image and instructions will be provided here once EcoInteractive has implemented updates.]

TIP Funding and Total Project Cost

This section uses the standard TIP fund programming block of data, which need not be shown here for these instructions. Funding data will be included for every project record carried forward from the FY 2023–2026 TIP. If the Total Project Cost shown at the bottom of the programming block does not match what was included in the Financial Analysis in Step 1 of the Technical Inputs Solicitation, then please adjust by adding or subtracting the necessary amount in any funding line item.

Please note:

- Changes made here are solely for the purposes of deriving a Total Project Cost that is consistent with data provided in the financial analysis.
- Changes made will not affect programming in the currently approved FY 2023–2026 TIP, nor will any change to the approved TIP of record be required.
- Funding information provided WILL NOT be used or portrayed as inputs to the FY 2026–2029 TIP.
- Fund programming data shown here is TEMPORARY. When development of the FY 2026–2029 TIPbegins, this data will be replaced by funding programmed in the FY 2023-2026 TIP as amended and modified at that time, and protocols will be in place to ensure that updates to funding made by amendments or modifications to the FY 2023-2026 TIP through the end of July 2024 are carried over to the draft FY 2026–2029 TIP.

A Final Note on Total Project Costs for LRTP and TIP Projects

TPB staff recognize that some project costs will change over time. While a full update to the LRTP and TIP takes almost two years, the financial analysis can only account for the information available at the time that inputs for the conformity analysis are due. Update project costs can and should be provided prior to publication of the Visualize 2050 LRTP and FY 2026–2029 TIP documents. Any updates will be reflected in an addendum to the financial analysis.

SCHEDULE INFORMATION

This section asks for information on the current status and timing of the expected and actual completion of the project.

29 ESTIMATED PROJECT COMPLETION DATE	30 ACTUAL PROJECT COMPLETION DATE	31 CURRENT IMPLEMENTATION STATUS

29. **ESTIMATED PROJECT COMPLETION** Estimated year that the project will be open to traffic or implemented.
30. **ACTUAL PROJECT COMPLETION** Use this field to indicate the year that the full scope of the project has been opened to traffic or implemented.
31. **CURRENT IMPLEMENTATION STATUS** Indicate the current status of the project using one of the project milestones or activities in the dropdown menu.

REGIONAL POLICY & FEDERAL PLANNING FACTOR SUPPORT

The questions in this section address the goals identified in the Regional Transportation Priorities Plan (RTPP). Question 39 should be used to provide additional context of how this project supports the TPB Aspirational Initiatives the RTPP goals or other regional needs identified in the Technical Inputs Solicitation Policy Guide.

32a. **NON-AUTO TRAVEL** Does the project promote non-auto travel or can it be expected to reduce VMT?

32b. **TRANSPORTATION OPTIONS** Identify all travel mode options that this project provides, enhances, supports, or promotes.

33 **ACCESSIBILITY IMPROVEMENT** Does this project improve accessibility for historically transportation-disadvantaged individuals (i.e., persons with disabilities, low-incomes, and/or limited English proficiency?)

34a. **EQUITY EMPHASIS AREAS** Is this project physically in an Equity Emphasis Area (EEA)?

34b. **ADDITIONAL EQUITY RESPONSE** Please provide additional written information that describes how this project further supports or advances equity as described by the TPB **July 2020 resolution.**

35 **ACTIVITY CENTERS** Indicate if the project begins or ends within an activity center, connects two or more centers, and/ or promotes non-auto travel within one or more centers

a. **BEGINS OR ENDS IN** Does this project begin or ends in an Activity Center?

b. **ACTIVITY CENTER WITHOUT** Does this project connect two or more Activity Centers?

c. **NON-AUTO TRAVEL WITHIN** Does this project promote non-auto travel within one or more Activity Centers?

d. **EEA-ACTIVITY CENTER CONNECT** Does this project connect an Equity Emphasis Area to an Activity Center?

36 **MAINTENANCE** Does this project contribute to enhanced system maintenance or preservation?

37 **OPERATIONS AND TRAVEL DEMAND** Does this project reduce travel time on highways and/or transit without building new capacity, (e.g., ITS, bus priority treatments, etc.)?

38 **SAFETY** Is this project expected to significantly reduce fatalities or injuries among motorists, transit users, pedestrians, and/or bicyclists?

39 **REDUCE EMISSIONS POLLUTANTS** Is the project expected to contribute to reductions in emissions of criteria pollutants, specifically, to attainment of ozone levels consistent with the National Ambient Air Quality Standard (NAAQS)?

40a. **REDUCE GREENHOUSE GASES** Is this project expected to contribute to reductions in emissions of greenhouse gases by 50% below 2005 levels by 2030?

40b. **ADDITIONAL RESPONSE**

If the answer to question #40 regarding contributing to greenhouse gas emission reductions was yes, then how is this project anticipated to reduce emissions? If 'No', please describe how the project will mitigate increased greenhouse gas emissions or vehicle miles traveled.

41 **PROMOTES FREIGHT**

This project enhances, supports, or promotes the following freight carrier modes (select all that apply):

42 **PASSENGER CARRIER MODES**

This project enhances supports, or promotes the following passenger carrier modes (select all that apply):

43 **ASPIRATIONAL INITIATIVES**

Please check each initiative that is implemented by this project. The aspirational initiatives are: (see next page)

44a. **ADDITIONAL POLICY FRAMEWORK**

Please provide additional written information that describes how this project further supports or advances the TPB Aspirational Initiatives.

44 b.

Please provide additional written information that describes how this project further supports or advances other regional goals or needs.

45 **FEDERAL PLANNING FACTORS**

This project supports the following planning factors (select all that apply):

APPENDIX A

Additional Financial Analysis Information

MEMORANDUM

TO: TPB Technical Committee

FROM: Eric Randall, TPB Transportation Engineer

SUBJECT: Revised Work Plan for the Visualize 2050 LRTP Financial Analysis

DATE: May 22, 2023

This memorandum provides the work plan and revised schedule for conducting the financial analysis of the Visualize 2050 update to the TPB's Long-Range metropolitan Transportation Plan (LRTP), following the TPB's revised schedule for the LRTP adopted on April 19, 2023.

The Visualize 2050 financial plan will cover years 2026 through 2050 (twenty-five years). It will build on work done for the 2022 update of Visualize 2045, with five additional "out" years.

The financial analysis work plan has two components. First, high-level "top-down" projections of revenue and expenditures (by type) are needed from the funding agencies. Second, a "bottom-up" review of project costs in the Project Info Track (PIT) database will need to be conducted to reconcile project costs with the high-level projections. This project cost review will take place in tandem with the Technical Inputs Solicitation and submission of all projects to the Project Info Track (PIT) database which will take place through December 29, 2023. Other financial analysis work includes a forecast of costs and revenues for transit services.

Respondents

- State DOTs: DDOT, MDOT, VDOT
- Major Transit Agencies: WMATA, PRTC, VRE, MTA, DRPT
- Jurisdictions: Counties and Cities
- Other: NVTA, NVTC, MDTA

Schedule

Phase 1a *(October 2022 – February 2023)* – High-Level Revenue and Expenditure Projections

- DOTs provided long-term (through 2050) financial projections.
  - Discuss and coordinate on long-term inflation factors
    - Congressional Budget Office (CBO) 2022 Forecast is for **2.3%** Consumer Price Index -Urban Consumers (CPI-U) inflation rate for 2031 through 2052.[1]
  - Projections of revenues: Federal (programmatic and discretionary grant projections), state fuel tax revenues, tolls/fares, sales taxes, and other source projections.
  - Projections of expenditures, by mode and by category:
    - a) Operations and Maintenance
    - b) Capital – State of Good Repair
    - c) Capital – Expansion, and

---

[1] Supplement to CBO's July 2022 report *The 2022 Long-Term Budget Outlook* www.cbo.gov/publication/57971

DOTs Deliverable(s): Submitted by March 1, 2023.

- Revenues and expenditures projected for 2026-2050 for all participants, by category:

Phase 1b *(January – May 2023)* – Local Jurisdictions and Agencies High-Level Projections

- Repeat high-level revenue and expenditure forecast process with local jurisdictions and other agencies for 2026-2050.
- Jurisdiction expenditures – local roadway and locally operated transit systems.
    - MD: Charles, Frederick, Montgomery, Prince George's Counties
    - VA: City of Alexandria; Arlington, Fairfax, Loudoun, Prince William Counties
    - DRPT, MDTA, NVTC, PRTC, VRE

Local Jurisdictions/Agency Deliverable(s): Due May 1, 2023.

- Revenues and expenditures projected for 2026-2050 for all participants, by category.

Phase 2a *(June – September 2023)* – Initial Analysis Results

- TPB staff work with all agencies to review high-level revenues and expenditures.
- Presentation of initial analysis results to Technical Committee as part of the Visualize 2050 progress updates and to inform Technical Inputs Solicitation project inputs (***September 2023)***

Phase 2b *(September 2023 – January 2024)* – PIT Database Project Cost Review

- Review of Project Info Track project costs (TIP and LRTP) submitted in response to the Technical Inputs Solicitation to validate planned expenditures.
    - Validate cost of <u>all</u> projects in PIT
    - Categorization of expenditures, by mode and by category
        a. Operating and maintenance
        b. Capital – State of Good Repair
        c. Capital – Expansion

All Funding Agencies Deliverable(s): Complete by December 29, 2023.

- Newly inputted project costs in PIT.

Phase 3 *(January – April 2024)* – Reconciliation and Preliminary Analysis Results

- TPB staff work with all agencies to complete reconciling revenues and expenditures.
- Presentation of preliminary financial analysis results to TPB as part of Visualize 2050 AQC Analysis Project Inputs review and approval

TPB Deliverable(s): Preliminary Financial Analysis by March 2024.

- Preliminary Regional Revenues projected for 2026-2050 for all participants, by mode and category:
    - Federal, State, Local, Fares, Tolls, Private/ Other
- Preliminary Regional Expenditures projected for 2026-2050 for all participants, by mode and category:
    - a) Operating and maintenance
    - b) Capital – State of Good Repair
    - c) Capital – Expansion

Deliverable(s):

- Draft Preliminary Tables to Participants by February 23, 2024.
- TPB / Tech Presentations in March (March 1, March 20).

Phase 4 ***(May 2024 – January 2025)*** **– Final Revisions, Report Production**

- Incorporate revisions by member agencies.
- Prepare a draft and final Financial Plan report for the Visualize 2050 LRTP.

Deliverable(s):

- Draft Report by October 2024.
- Final Report by January 2025.

APPENDIX B

Amendment and Administrative Modification Procedures

PROCEDURES FOR REVISIONS TO THE LONG-RANGE TRANSPORTATION PLAN AND THE TRANSPORTATION IMPROVEMENT PROGRAM (TIP) FOR THE NATIONAL CAPITAL REGION

RESOLUTION ADOPTED SEPTEMBER 2019

Introduction

On January 16, 2008, the TPB adopted procedures for processing revisions to its Long-Range Transportation Plan (LRTP) and Transportation Improvement Program (TIP). A revision is a change to the LRTP or TIP that occurs between scheduled periodic updates. A minor revision is an Administrative Modification and a major revision is an Amendment. These procedures are in accordance with the US DOT planning regulations 23 CFR 450. These procedures were most recently amended by TPB Steering Committee Resolution SR 8-2020 on September 6, 2019.

According to 23 CFR 450.326: TIP Revisions and Relationship to the STIP, the regional TIP projects must be included without change in a federally approved state transportation improvement program (STIP) in order for them to receive federal funding. In the TPB's metropolitan Washington region, the District of Columbia Department of Transportation (DDOT), the Maryland Department of Transportation (MDOT), and the Virginia Department of Transportation (VDOT) each provide the project descriptions and funding information for the development of the regional TIP and LRTP. Each DOT has adopted procedures for revising its STIP. When it becomes necessary for a DOT to revise the project information in the TIP, its procedures must be consistent with the TPB procedures for revising its regional TIP.

The TPB procedures are based upon the procedures adopted by DDOT, MDOT and VDOT. The procedures define what Administrative Modifications and Amendments are.

Definitions

Administrative Modifications are minor changes to a project included in the LRTP, TIP or STIP that do any one or combination of the following actions:

1. Revise a project description without changing the project scope or conflicting with the environmental document;
2. Change the source of funds;
3. Change a project lead agency;
4. Split or combine individually listed projects; as long as schedule and scope are unchanged and as long as the funding amounts stay within the guidelines in number seven below.;
5. Change required information for grouped project (lump sum) listings; or,
6. Add or delete projects from grouped project (lump sum) listings as long as the funding amounts stay within the guidelines in number seven below.
7. Revise the funding amount listed for a project's phases subject to the applicable definition of the funding limitations adopted by DDOT, MDOT, and VDOT for their respective STIPs.

a. For projects to be included in the DDOT STIP, the additional funding is limited to 20% of the *total project cost**.
b. For projects to be included in the MDOT STIP, changes to the funding amount is limited based upon a sliding scale that varies by the total cost* of the project as follows:
   - If the total project cost is less than $3 million, an Administrative Modification shall be used for an increase or decrease in cost of up to 50% of the total project cost or $1 million, whichever is less.
   - If the total project cost is greater than $3 million but less than $10 million, an Administrative Modification shall be used for an increase or decrease in cost up to 30% of the total project cost.
   - If the total project cost is greater than $10 million, an Administrative Modification shall be used for an increase or decrease of cost up to 20% of the total project cost.
c. For projects to be included in the VDOT STIP, the additional funding is limited based upon a sliding scale that varies by the funding source and total cost* listed for the project as follows:
   - For transit projects using Federal Transit Administration (FTA) funds:
     - If the Approved STIP total estimated project cost is $2 million or less, an Administrative Modification shall be used for an increase of up to 100% of the total project cost.
     - If the project cost is greater than $2 million but is $10 million or less, an Administrative Modification shall be used for an increase of up to 50% of the total project cost.
     - If the project cost is greater than $10 million, an Administrative Modification shall be used for an increase of up to 25% of the total project cost
   - For highway projects using Federal Highway Administration (FHWA) funds:
     - If the Approved STIP total estimated project cost is $2 million or less, an Administrative Modification shall be used for an increase of up to 100% of the total project cost.
     - If the project cost is greater than $2 million but is $10 million or less, an Administrative Modification shall be used for an increase of up to 50% of the total project cost.
     - If the project cost is greater than $10 million but is $20 million or less, an Administrative Modification shall be used for an increase of up to 25% of the total project cost.
     - If the project cost is greater than $20 million but is $35 million or less, an Administrative Modification shall be used for an increase of up to 15% of the total project cost.
     - If the project cost is greater than $35 million, an Administrative Modification shall be used for an increase of up to 10% of the total project cost

An Administrative Modification can be processed in accordance with these procedures provided that:
- It does not affect the Air Quality Conformity determination;
- It does not impact financial constraint; and
- It does not require public review and comment.

Amendments are major changes to a project included in the LRTP, TIP or STIP that are not Administrative Modifications.

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* See "Defining Total Project Cost" on the next page for further clarification of this term and how it relates to the definitions permitting Administrative Modifications.

Defining Total Project Cost

One of the TPB's primary roles is to verify the financial constraint of the region's LRTP and TIP. In order to accomplish this, the TPB must have accurate estimates for all expenditures planned in the LRTP and programmed in the TIP. The Project InfoTrak database application is one tool that the TPB uses to meet this requirement. Project InfoTrak includes hundreds of records of projects and programs in the LRTP and TIP and their planned expenditures. Each of these records can be categorized as either a *discrete project* or an *ongoing program*. These two terms are defined below along with an explanation of how the "total project cost" for each type is calculated. These two definitions for the total project cost are what TPB staff will use when determining the threshold between which actions can be performed as Administrative Modifications and which will require

Total Project Cost for Discrete Projects

Discrete projects are those LRTP or TIP records that have finite total costs and actual projected completion dates. The total project cost is not the same as the total amount of funding programmed in the four years of the TIP and can include funding spent or programmed outside the four years of the TIP.

The total project cost for discrete project records should cover the full scope of work described in the project's description including studies, planning, preliminary engineering, right-of-way acquisition, construction, utilities, and overhead or any other capital expenditures through the expected completion of the project. The TPB's Project InfoTrak database application automatically calculates a total cost for each project by adding together all funds programmed in previous TIPs (shown in TIP tables in the "Prior" column), all funds programmed in the active four years of the TIP, and any funding that the implementing agency has scheduled beyond the final year of the TIP (shown in TIP tables as "Future" funding, sometimes called "balance to build" or "cost to complete"). ***For discrete projects, this calculated "total programmed amount" will serve as the total project cost.*** While the Project InfoTrak system labels all funding entered for a project as "programmed," any future funding amount is provided only for the purpose of calculating the total project cost and does not necessarily represent an agency's programmed funding beyond the TIP, nor shall it be considered a commitment to program those funds. Consistent with practices used in the LRTP financial analysis, all future funding should be provided in Year-of-Expenditure (YOE) dollars.

Breakouts from Discrete Projects

Sometimes agencies will advance one segment of a larger discrete LRTP project into the TIP to begin programming it for construction. There may also be instances where an agency will begin studying, planning, preliminary engineering or even acquiring rights-of-way for projects that aren't expected to begin construction until much later. This section discusses how breakouts from discrete projects should be handled and what constitutes the "total project cost" for those breakout records.

As stated in the "Definitions" section of this document, a project segment or phase may be broken out in the TIP as an independent discrete project record, so long as there is no change to how the project is reflected in the most recently approved air quality conformity analysis and the action is in compliance with any and all other federal requirements. Discrete projects or any sub-segment or independent phase thereof should be submitted in the Project InfoTrak system as either an LRTP record or a TIP record so as to prevent double counting of projected expenditures. Any breakout record should be titled, categorized (using the Primary Project Type field) and described so that it is clear the record covers only that specific phase or segment. Break-out records for project segments should include the total projected cost for that segment only, using prior and/or future funding if necessary. Breakout records for any pre-construction phases should capture the projected cost of that entire phase (again using prior and/or future funding if necessary). This will then be considered the “total project cost” for those breakout phases or segments. Whenever a project phase or segment is broken out from a larger LRTP (or another TIP) project, the original project data (title, description, map, and funding, etc.) should also be updated to reflect the removal of that phase or segment. For example, the total project cost of a record that is identified as “Study Only” should only cover the cost of doing the actual study. The full projected cost of constructing the project should remain with the original project record minus the cost of the study, presuming it had previously included that amount.

Total Project Cost for Ongoing Programs

Ongoing programs differ from discrete project records in that they are typically anticipated to continue indefinitely and do not have an estimated completion date. These programs are often funded at or near the same level from year to year. They may be operational programs such as a Commuter Assistance Program or traffic operations. They may focus on roadway, sidewalk, or transit asset maintenance. Ongoing programs also include project groupings which are utilized by every agency. Project groupings may themselves be a collection of smaller-scale discrete projects, however the continuous annual funding and lack of a conclusive date mean they behave more like an ongoing operational program than a discrete project. This continuous nature makes calculating a finite “total project cost” somewhat arbitrary. ***For ongoing program records, the 4-year program total will serve as the total project cost.*** Funds shall be programmed in the active four years of the TIP only. All prior funding will be removed and no future funding should be entered. To account for all expenditures in the LRTP, ongoing programs should have one TIP record to cover the first 4 years, and one LRTP record that reflects the cost of the program beyond the final year of the current TIP through the horizon year of the LRTP.

Procedures

When it becomes necessary for a DOT to revise the information for a project in the LRTP or TIP, the agency will review the type of changes to the project and apply the above definitions to determine if it can be processed by the TPB as an Administrative Modification or an Amendment. The DOT will then submit the project changes to the TPB and request that it take the appropriate action to approve either a project Administrative Modification or a project Amendment.

TPB staff will publish a schedule that announces in advance when submissions for amendments and administrative modifications will be accepted and the associated due dates for data entry and submission of the requests. These dates are subject to change due to unforeseen circumstances, but staff will update the published schedule as far in advance as possible and make every effort to inform the implementing agencies of any such changes. Amendment and administrative modification submissions will not be accepted after the posted due dates, save for extenuating circumstances.

Amendments

At the beginning of each Amendment cycle, TPB staff will issue a call for Amendments. Each agency requesting an LRTP or TIP Amendment must complete their data entry and submit a signed letter addressed to the Chair of the TPB by the specified deadline. The letter must state why the

Amendments are being requested, specify if any funds are simply being advanced and deducted from “future” funding (which would not change the total project cost), identify the source of any new funding that would increase the total project cost, and whether or not that funding was included in the financial analysis of the most recently approved LRTP and TIP.

The requests will be reviewed by TPB staff and those meeting the definition of an Amendment will be presented to the TPB Steering Committee. The Steering Committee will consider and be asked to approve project Amendments that are non-regionally significant[†]. Under the TPB Bylaws, the Steering Committee “shall have the full authority to approve non-regionally significant items, and in such cases, it shall advise the TPB of its action.” The Steering Committee will consider and place all other project Amendments on the TPB agenda for consideration and approval after meeting the applicable US DOT planning regulations for LRTP and TIP Amendments. For agencies requesting an amendment to update its entire section of the TPB’s TIP, a 30-day public comment period is required. In such instances, agencies must provide TPB staff with notice at least 60 days in advance in order to ensure that the amendment can be given adequate time on the necessary agendas.

All TPB approved requests for LRTP and TIP project Amendments will be forwarded to the requesting DOT and recorded in Project InfoTrak. Upon receipt of the approved amendment, the requesting DOT will transmit it to FHWA and/or FTA (depending on the funding sources involved) along with the request for federal approval of an amendment to its STIP. Agencies may transmit their STIP amendment requests either directly from within Project InfoTrak or via email to the appropriate US DOT agency. Requests sent via Project InfoTrak will alert the federal agency personnel responsible for review of that jurisdiction’s STIP that there is a pending amendment request and provide them with a link to log into the system, review the request and approve it if deemed acceptable. Requests sent via email should include courtesy copies sent to the Director of the Department of Transportation Planning of the Metropolitan Washington Council of Governments and any relevant TPB staff member(s). The DOT is also responsible for ensuring that TPB staff are kept appraised of any federal approvals so that they may be logged in Project InfoTrak. After approval by FHWA and FTA, the Amendment will be incorporated into the DOT’s STIP.

Administrative Modifications

In accordance with the posted schedule, TPB staff will announce the opening of each period for accepting Administrative Modification requests. The TPB has delegated approval of LRTP and TIP project Administrative Modifications to the Director, DTP. Requests for LRTP and TIP project Administrative Modifications will be submitted via email to the Director or their designee. In the Administrative Modification request, the submitting agency must state why each Administrative Modification is needed, the source of any new funds that increase the project cost and whether those funds were included in the most recent financial analysis of the LRPT and TIP, and why the agency believes that the action qualifies as an Administrative Modification, citing the definitions provided above and the agency’s procedures and agreements with FHWA and FTA. The request(s) will be reviewed and those meeting the definition of Administrative Modification will be approved and posted in the Project InfoTrak system. Approved LRTP and TIP project Administrative Modifications will be forwarded to the requesting implementing agency for incorporation into its STIP with no federal action required.

† The definition of “regionally significant” and “non-regionally significant” used here is not the same as that used in the air quality conformity process (which involves the creation of new movement options within the model used to predict travel patterns from which motor vehicle emissions are calculated). Here, the term is more subjective and factors such as the scale and scope of the project and the additional amount of proposed funding may be considered.

Cumulative Administrative Modification Totals

Since Administrative Modifications are not reviewed and approved by FHWA or FTA, only initial TIP adoptions or subsequent Amendments can provide those agencies with an official change in project or program cost. Therefore, when calculating the percentage increase in a total project cost across successive Amendment Modification requests, the baseline total project cost will always refer back to the total project cost most recently approved by adoption of, or Amendment to the TIP. Once the threshold between an Administrative Modification and an Amendment is reached the next action taken must be by Amendment, regardless of the size of the Administrative Modification requested. This will prevent a scenario where successive Administrative Modification requests would effectively bypass the intended limit to an increase of a project or program's cost.

Dispute Resolution

If a question arises on the interpretation of the definition of an Amendment, the TPB, the requesting DOT, FHWA and FTA (the parties) will consult with each other to resolve the question. If after consultation, the parties disagree on the definition of what constitutes an Amendment, the final decision will rest with the FTA for transit projects and FHWA for highway projects.

TECHNICAL INPUTS SOLICITATION:
Instructional Guide Addendum

For the Visualize 2050 National Capital Region Transportation Plan and the FY 2026-2029 Transportation Improvement Program (TIP), and the Air Quality Conformity Analysis conducted for the plan and TIP

April 2025

National Capital Region
Transportation Planning Board

TECHNICAL INPUTS SOLICITATION: INSTRUCTIONAL GUIDE ADDENDUM
April 2025

ABOUT THE TPB
The National Capital Region Transportation Planning Board (TPB) is the federally designated metropolitan planning organization (MPO) for metropolitan Washington. It is responsible for developing and carrying out a continuing, cooperative, and comprehensive transportation planning process in the metropolitan area. Members of the TPB include representatives of the transportation agencies of the states of Maryland and Virginia and the District of Columbia, local governments, the Washington Metropolitan Area Transit Authority, the Maryland and Virginia General Assemblies, and nonvoting members from the Metropolitan Washington Airports Authority and federal agencies. The TPB is staffed by the Department of Transportation Planning at the Metropolitan Washington Council of Governments (COG).

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TABLE OF CONTENTS

INTRODUCTION

The initial Technical Inputs Solicitation (TIS): Policy Guide for Visualize 2050 and the FY 2026-2029 Transportation Improvement Program (TIP) was approved by the TPB in February 2023. Staff from the TPB member implementing agencies responsible for providing project inputs via the TPB's Project InfoTrak (PIT) system were provided a separate Instructional Guide that same month. This Instructional Guide Addendum is a continuation of that initial document, intended for the same audience of Project InfoTrak system users for the purposes of providing inputs to the FY 2026–2029 TIP. It contains no new policy directions or changes from the initial Policy Guide document.

TIS Instructional Guide: Steps 1-4

The initial TIS Instructional Guide broke down the process by which agencies should submit their project and program information into four simple steps:

1. Financial plan and fiscal constraint analysis
2. Review and update existing projects and air quality conformity inputs
3. New projects and other additional air quality analysis inputs.
4. FY 2026–2029 TIP Development, Performance-Based Planning & Programming (PBPP), and Congestion Management Process (CMP) Documentation Review

Because the first three steps are critical to the air quality conformity analysis, all three had to be largely complete before the analysis could begin. In contrast, because the TIP deals with near-term funding, beginning with either the current or upcoming fiscal year, the fourth step occurs closer to the approval of the Visualize Plan and TIP. When the initial TIS Instructional Guide was written, TPB staff were aware that the consultant that provides the Project Tracker platform on which Project InfoTrak is built would be upgraded. Between the platform upgrade and the need for the latest planned obligation data for TIP programming, staff made the decision to release this supplementary documentation at a later time to provide more information on the TIP development process.

Training Sessions and Q&A Sessions

This Instructional Guide Addendum is being released in conjunction with two training sessions provided by TPB staff that will cover most of the topics herein. These sessions are recorded and available for later viewing. TPB staff will also be available for two 1-hour unformatted Question & Answer Sessions.

Trainings

Thursday, March 13 – 10:00 AM
Friday, March 14 – 2:00 PM

Question & Answer Sessions

Friday, March 21 – 1:00 PM
Friday, March 28 – 11:00 AM

Others TBA, as needed

FEDERAL REQUIREMENTS FOR THE TIP

While not a comprehensive list, these requirements are proscribed in federal legislation and pertain to some of the data that will be requested during this next phase and analysis done with the financial inputs.

CMP DOCUMENTATION

When the **Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU)** was signed into law in 2005, the Federal Highway Administration (FHWA) began requiring MPOs to develop and document a regional Congestion Management Processes, or CMP. The CMP requires that alternatives to major highway capacity increases be considered and, where reasonable, integrated into capacity-increasing projects. Except if projects fall under at least one of the exemption criteria listed in Table A below, projects in the following categories require a Congestion Management Process Documentation Form:

- New limited access or other principal arterial roadways on new rights-of-way (PIT Project Type: Road – New Construction)
- Additional through lanes on existing limited access or other principal arterial roadways (PIT Project Type: Road – Add Capacity/Widening)
- Construction of grade-separated interchanges on limited access highways where previously there had not been an interchange (PIT Project Type: Road - Interchange Improvements)

Figure 1: CMP Documentation Exemption Options

If a project meets any of the criteria listed below (a–e), it does not need a CMP documentation form:

a. Construction cost for the project is less than $10 million.

b. The number of lane-miles added to the highway system by the project is less than one lane-mile

c. The project consists of Study or PE phases only and is not funded for construction in the TIP.

d. The project is an intersection reconstruction or other traffic engineering improvements, including replacement of an at-grade intersection with an interchange

e. The project will not use federal funds in any phase of development or construction (100% state, local, and/or private funding).

f. None of the exemption criteria above apply – a CMP Documentation Form is required.

If you have the luxury of having more than one criteria be true, it's always best to opt for the one that is least likely to change. Projects adding less than a lane mile or undergoing intersection reconstruction are less likely to change scope than those funded with $9.8 million in state funding that may increase in cost or eventually require federal funding. Currently, the most frequently selected exemption criterion is option *c: the project consists of studies or PE only, and is not funded for construction in the TIP*. This option is almost always bound to expire as projects advance. TPB staff will review all records to verify that projects with this exemption do not have construction funds programmed.

PERFORMANCE-BASED PLANNING & PROGRAMMING

First mandated by the **Moving Ahead for Progress in the 21st Century Act (MAP-21)** in 2012 and then expanded upon in 2015 by the **Fixing America's Surface Transportation (FAST) Act** state transportation agencies and MPOs agencies have submitted their financial programming, TPB staff will use that data in combination with other data external to the PIT to meet these requirements. There are no special inputs or features in Project InfoTrak that relate specifically to PBPP, but this analysis will be done using the financial inputs provided by each agency.

REGIONALLY SIGNIFICANT PROJECTS

Regionally significant (for air quality purposes or RSAQ) projects must be included in the TIP, regardless of their funding source. RSAQ projects may not be entered as Component Projects of Project Grouping records; they must be Discrete Project records (these types of records are described in the next section).

Not all RSAQ projects need to be in the TIP. Projects slated for completion in 2035 or later, probably won't have specific funding allocated to them. However, if a project or phase of a project is slated for completion between 2030 and 2035 we might expect to see at least some PE or ROW activity funded in the FY 2026–2029 TIP. *Any project slated for completion by 2029 is federally required to show full funding for completion of construction in the TIP.*

TPB staff will conduct a review with each agency of all records that show a completion year prior to 2030. Staff will assist agencies as needed with converting any CE records into TIP records. Any RSAQ records will be required to demonstrate full funding for completion of construction or implementation and the estimated year of completion cannot be altered. Non-regionally significant records (NRSAQ) should either demonstrate full funding for completion or should revise the expected completion years for those projects.

FINANCIAL CONSTRAINT

The TPB is required by federal law to demonstrate that the FY 2026–2029 TIP is financially constrained. Meeting this requirement means that the TIP needs to include a financial plan that shows how the projects will be funded using funding sources are reasonably expected to be available. To achieve this, TPB staff need two relatively complex pieces of data: total costs for projects and programs in the TIP and the expected revenue streams from federal-aid programs, state, local, and other funding sources.

Total Project Cost

To verify that sufficient funding is reasonably expected to be available to afford the projects and programs in the TIP, each record must include a "Total Cost". The Total Cost also plays a critical role in the amendments and administrative modification procedures once the TIP is active. The Total Project Cost is not a single manually entered field in the Project InfoTrak system, rather it is a calculated total cost of programmed funds. These calculations are performed in one of two ways, as discussed in the TIP Data Records definitions in the next section.

Four-Year Financial Projections

TPB staff will be asking each agency for their four-year projections of estimated revenues from federal-aid programs administered by FHWA and FTA, and other sources such as state, local, and private investments. This will be done in an exercise following the May 9, 2025 deadline for financial inputs.

THE TIP AND PROJECT INFOTRAK ARCHITECTURE

This section describes how TIP, MTP, and Overarching Project (OAP) records relate to each other within the Project InfoTrak system. MTP record IDs start with "CE" (for "Constrained Element," a reference to projects included in the financially constrained element of the long-range transportation plan, formerly called the CLRP). TIP record IDs usually start with a "T." OAP records are multi-record projects containing two or more MTP and/or TIP record IDs that make sense to describe in a single way due to their scope, location, and primary project type. The following section further categorizes TIP records into Discrete, Ongoing, and Grouped projects and programs. and explains their identification and classification.

TIP, MTP, and Overarching Project Records

TIP records cover projects and programs that are present and active in the first four years of the TPB's Metropolitan Transportation Plan. MTP records pick up from there and capture capital and operating investments through the 25-year horizon of the Visualize 2050 plan. The data-collection forms for MTP records and TIP records are nearly identical, with the only real difference being found in the Programming Information section, where the TIP asks for much greater detail on funding levels, phases, sources, etc. Essentially, TIP records are MTP records with a little more information about funding.

For the first time, Visualize 2050 and the FY 2026–2029 TIP will utilize a new type of record in the Project InfoTrak system: Overarching Projects (OAP). OAPs are multi-record projects that offer a new way of discussing the "bigger picture" of projects or programs that are conceptually related to each other by contiguity, proximity, chronology, and/or category. Any two or more MTP and/or TIP records can be assigned under an OAP.

OAPs can be thought of as super-projects or super-programs; each record contains some qualitative data, such as project title/program name, a description, and for project-oriented records, a route ID, facility name and limits that capture the breadth of the associated sub-projects. However, unlike their MTP and TIP counterparts, OAP records will aggregate some of the data like cost, completion year, jurisdictions and lead agencies (where applicable), to keep the information associated with these records as up-to-date and accurate as possible. The following are some examples of ways that Overarching Projects may be used:

- Multiple segments along a corridor: may include multiple MTP and/or TIP records and roadway segments may be contiguous or disjointed.
- Interdependent project records where Project B would not be built, but for the implementation of Project A (e.g. a new highway interchange ramp is being constructed because a new infill transit station will require access improvements).
- A TIP record with only PE funding for a discrete project, and its related MTP record covering all remaining phases through construction.
- A TIP record for an ongoing program with funding in each fiscal year of the TIP, and a companion record for the MTP to account for the projected expenditures of that program through the horizon year of the plan.

Types of TIP Records: Projects, Programs, and Groupings

Records in the TIP generally fall into one of three categories:

- Discrete Projects and Programs
- Ongoing Programs
- Project/Program Groupings

General definitions for these types of records are provided in the sections that follow. How the total cost for these record types is calculated is covered in the next section.

NEW FIELD ALERT

There is a new field in the Project Information section labeled "Record Type". Please use the definitions provided on this page to determine which response should be selected for this field. This value determines how the total cost for the record is calculated and whether prior or future funding

DISCRETE PROJECTS AND PROGRAMS

Discrete projects are those TIP records that have finite total costs and projected completion dates. Discrete projects will typically program funds for Planning & Engineering, ROW Acquisition, and Construction phases. Funding for these phases will often span fiscal years prior to and beyond the active four-year span of the current TIP of record. Discrete Programs may not follow the same project phase structure, but they are short-term programs that begin and end with a finite total cost. Examples may include replacement of standard diesel buses with electric buses or signal prioritization for transit vehicles. Discrete projects and programs account for the majority of records in the TIP. As such, this is the default record type in Project InfoTrak; there are no field designations that explicitly denote a record as a discrete project or program.

ONGOING PROGRAMS

Ongoing programs differ from discrete project records in that they are typically anticipated to continue indefinitely and do not have an estimated completion date. These programs are often funded at or near the same level from year to year, typically adjusted to account for inflation. They may be purely operational in nature such as a Commuter Assistance Program or traffic and transit operations. Or they may be more capital in nature, reflecting annual roadway resurfacing, spot improvements, streetlight or signage maintenance, or transit asset maintenance.

PROJECT GROUPINGS

TIP grouping records program funds for a collection of smaller-scale, non-regionally significant, discrete projects. They can also be used to fund smaller-scale operational programs that don't continue indefinitely. The projects or programs grouped together like this are identified as "Component Projects" in Project InfoTrak, and these sub-projects or sub-programs should be listed individually on the Component Projects tab.

Calculating Total Cost for Projects, Programs, and Groupings

TOTAL PROJECT COST FOR DISCRETE PROJECTS

- There are two primary reasons that we focus on the definitions of a "total project cost" in the Project InfoTrak system: for the financial analysis of the MTP and TIP, and for Project InfoTrak calculates the total cost of TIP records by summing all amounts included in the Program Information section of each record. This includes:
- The sum of all funding programmed prior to the first year, or Annual Element of the TIP,
- The sum of all planned obligation funds programmed in the current four years of the TIP, and
- The sum of any allocations, planned obligations, or otherwise reasonably anticipated funding that the implementing agency has scheduled beyond the out- year of the TIP.

About Prior and Future Funding

While funds are shown by fiscal year in the financial programming tables of the PIT, when presented in any formal outward-facing report, any funding prior to the Annual Element is summed up by source and phase and labeled as "Prior Funding." Likewise, any funding beyond the out- year of the TIP is summed up by source and phase and labeled as "Future Funding", which should only be used to show remaining funding for a phase that goes beyond the four-year TIP window. A companion, MTP record should be used for project phases not yet programmed in part in the TIP.

Transitioning from MTP to TIP records for Discrete Projects

This section discusses the mechanics of advancing a segment or a phase of an MTP discrete project into the TIP and what constitutes the "total project cost" and "year of completion" when parts of the full MTP record advance on different timelines.

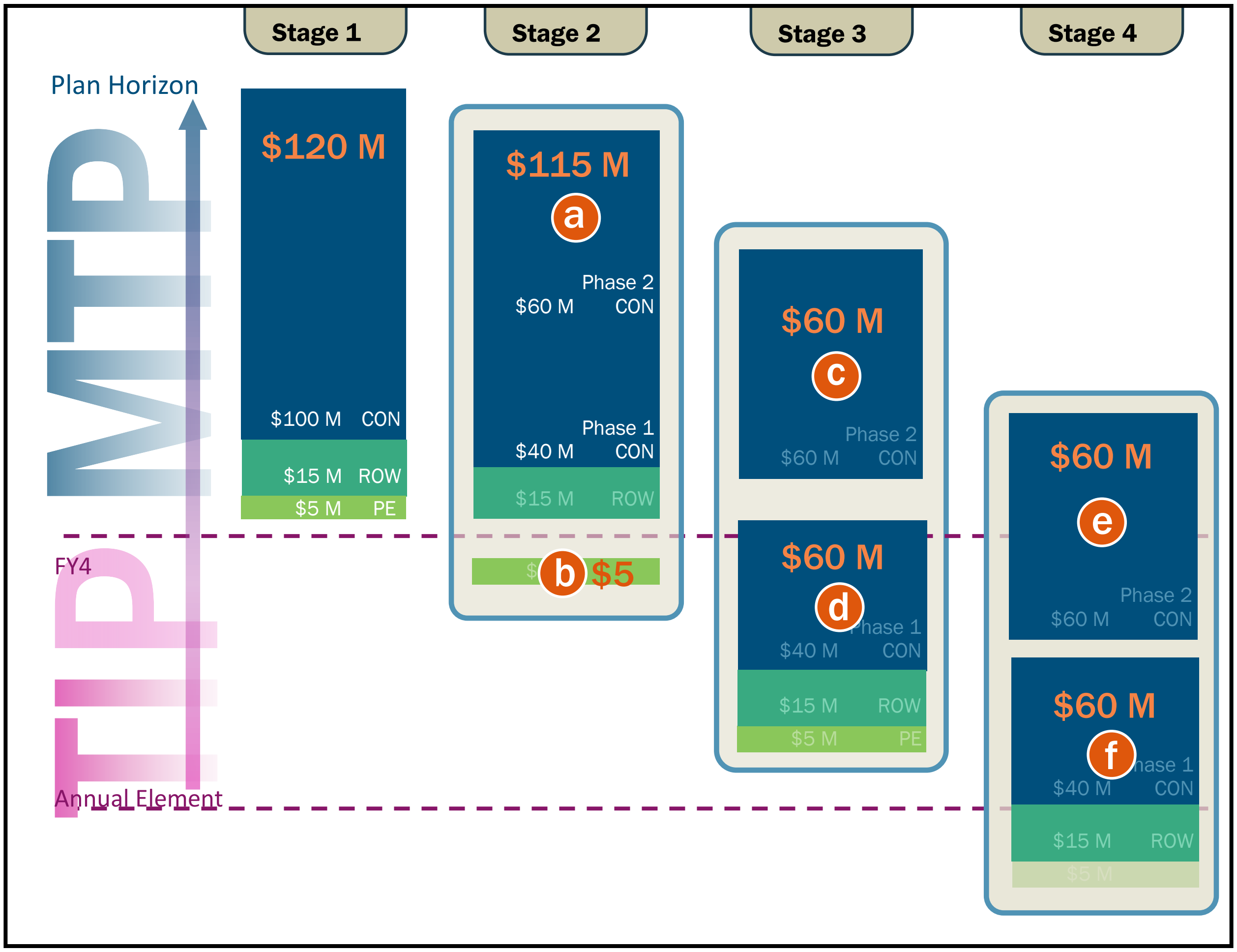
When an agency wants to advance the first segment of a larger discrete MTP project for construction or to begin planning and engineering for a project expected to be complete in ten years they will need to break out that segment or phase from the MTP record and create a new discrete project record in the TIP. This can be done as long as there is no change to how the project is reflected in the most recently approved air quality conformity analysis of the MTP and TIP. Any breakout TIP record from the MTP project should be clearly titled, properly categorized (using the Project Type field), and described as covering only that specific phase or segment. The funds programmed for a TIP record of this kind should be dedicated solely to that phase or segment, so that the calculated total cost reflects only the breakout phase or segment. If the breakout record is a pre-construction phase, funding for that entire phase should be shown in that record, including the use of prior and/or future funding years where necessary. In addition to the creating of the new TIP record, the MTP record should be adjusted to remove any descriptive and/or monetary references to the phase or segment that has been extracted.

WHAT ABOUT CONFORMITY?

New TIP records can only be created by adoption or amendment. Funding can be programmed in a draft TIP only if it is consistent with the inputs to the draft conformity analysis for that MTP and TIP adoption cycle. Any project being amended into an existing TIP must be in the approved conformity analysis of record and may not make any changes to those details. The examples in this section presume that conformity is not at issue.

Now that this project requires two records it will also require the establishment of an Overarching Project. This process and organizational schematic is described in more detail in Figure 2 below. For now, TPB staff will be responsible for setting up OAP records.

Figure 2: Progression of MTP, TIP, and OAP Records



The following is a hypothetical example of how a project may progress from the MTP to the TIP, based on the illustration in Figure 2.

STAGE 1

The process begins with one project record in the Metropolitan Transportation Plan (a CE record). The project is estimated to be complete by 2040 and cost approximately $120 million. This project is contained entirely within this one record so there is no need for an Overarching Project to be created yet.

STAGE 2

Two years later the TPB is in the process of updating the TIP to cover fiscal years 2028 through 2033 and has issued a call for updates to the projects included in the conformity analysis. Based on initial studies the agency has decided to split completion of the project into two segments; one complete in 2035 and the second in 2040. When programming funds for the updated TIP, the agency advances the Planning & Engineering (PE) phase into the TIP with $5 million. This project must now be accounted for with two records: an MTP record (a) and a TIP record (b).

a) The original MTP record should now contain two conformity records. The project description should be updated to indicate that it now only covers the right-of-way acquisition (ROW) and construction (CON) phases, and the total project cost should be adjusted to reflect the removal of the PE phase.

b) The new TIP record should be created using the Duplicate Project tool found in the context menu that opens when you click on the three vertical ellipsis dots (⋮) to the right of the Submit for Review button (see full instructions on page 10). The title of and description should be modified to indicate that this is a PE-only phase record. The project type should be changed to “Study/ Planning/Research” and any conformity records that copied over should be removed. Funding for the entire PE phase should be included on this record, even if that requires using “future funding”. The expected completion year should identify when the PE phase is expected to be complete. Lastly, the agency should contact TPB staff to request that an OAP record be created to hold both project records.

Stage 3

Several months later, the agency requests an amendment to the TIP to include funding for ROW and CON for Phase 1. Providing there are no changes to the conformity analysis in terms of scope or schedule, the amendment is permissible. In preparing the amendment, the following should take place:

c) The MTP record should again be adjusted as follows: the title, description, total cost, and map should be updated to reflect the removal of all of Phase 1. The conformity record for Phase 1 should be manually copied from the MTP record to the existing TIP record previously designated as “PE Only”.

d) The title and description should be edited to remove any reference to “PE Only” and to reflect the full construction of Phase 1 of the project. The conformity record for Phase 1 should be included with this record (TPB staff may need to edit the CON ID field to maintain the same ID from the MTP record). The expected completion year should be changed to 2035 and the Current Implementation Status field updated accordingly. When programming funds for ROW and CON, it is likely that some funding for CON will extend beyond the out-year of the TIP of record (2033). Since construction is already being funded for Phase 1 prior to 2033, the remaining CON funds should be placed in FY 2024 and 2025 to be shown as “Future Funding.” Depending on the alignment of the TPB’s TIP and the agency’s STIP, these funds may already be allocated and planned for obligation in those years, thus the TIP and STIP are in agreement.

STAGE 4

In another couple of years, the TPB is once again updating the MTP and TIP. The new TIP will cover fiscal years 2030 through 2035. During development of the TIP, the agency advances Phase 2 of the project into the TIP, including funding for construction (additional PE and ROW funding would likely be included with this new TIP record, but for simplicity’s sake it is shown only as CON funding). The following actions must be taken:

e) The new TIP record should be created using the same Duplicate Record method described above and on page 10 of this document. The conformity record should be copied from the MTP record to the new TIP record. The Change Reason for the MTP record should be set to “Project Changed,” and “Converted to TIP record” should be selected from the additional change details sub-menu. The agency can then save and submit the MTP record and it will effectively be archived. Do not set the Change Reason to “Completed” or “Withdrawn.” Since the original MTP record is being archived and CON funding is being programmed in the new TIP, the remaining CON funding required to complete construction of Phase 2 should be included on this record, using Future Funding years as necessary.

f) Since the completion year for this segment as shown in the conformity analysis is now within the 4-year span of the TIP, funding for completion of construction of Phase 1 must be fully programmed.

TOTAL PROGRAM COSTS FOR ONGOING PROGRAMS AND GROUPED PROJECTS

Even though they are comprised of multiple discrete projects and programs, the overlapping and continuous funding and the lack of a conclusive date for project grouping records mean that they behave more like ongoing operational programs than discrete projects. Each agency may have different means of determining funding levels for project groupings, but for the purpose of determining a total program cost, they are addressed together in this section.

We cannot use the sum of all prior, current, and future funding to determine total project cost for ongoing programs and project groupings, as we do for discrete projects, For the purposes of a financial analysis of the plan, adding the annual funding in the four-year program of the TIP and the linear projection of that cost through the horizon year provides a valid “total expenditures” amount. But if the prior funding were also to be included, the “total project cost” would very quickly become astronomical. The continuous nature of Ongoing Program and Project Grouping records makes calculating a finite “total project cost” somewhat arbitrary. So, for ongoing program and project grouping records, the four-year program total will serve as the total program cost. Funds shall be programmed in the four active years of the TIP only. All prior funding will be removed and no future funding should be entered. To account for all expenditures in the MTP, ongoing programs should have one TIP record to cover the first four years, and one MTP record that reflects the cost of the program beyond the final year of the current TIP through the horizon year of the MTP.

USING PROJECT INFOTRAK FOR YOUR FY 2026–2029 TIP FINANCIAL INPUTS

Preparing for Inputs to the FY 2026-2029 TIP

Before beginning data entry for their financial inputs to the TIP, TPB staff will meet with each agency to review some preparatory steps that address the following issues:

1. Carry-over of project/program records from 23-xx to 26-00 data sets
2. Conversion of CE records that show completion prior to 2030
3. Removal of all prior funding for ongoing program records (performed by TPB staff and not described in this document)

Step 1: Carry-over any remaining 23-xx records

The first step in preparing the new TIP is to make sure all relevant records that need to, have been carried over to the 26-00 data set. For the most part, this process has already taken place. TIP records were carried over at the outset of the conformity inputs process, and then again when TPB staff asked agencies to review ongoing program records and all remaining non-regionally significant project records.

INSTRUCTIONS: HOW TO CARRY RECORDS OVER TO A NEW CYCLE

The PIT database includes functionality that can move projects in bulk from plan cycle or revision to another. If, for any reason a record or group of records was not carried over, most users are also able to carry over individual project records.

To carry over one or more records, navigate to the Accepted project list. From here, users will need to click on the vertical ellipsis (⋮) to the right of the "New Project" button. There will be an option to make "Bulk Actions" that will need to be activated. When activated, checkboxes will appear on the left side of the projects in the list that can be clicked to select the projects that need to be carried over. When all the projects are selected, the top of the project list contains a bulk action tool labeled "Carry-Over" that will need to be clicked. When clicked, the user will be prompted to select the Plan Cycle and Plan Revision. After the selections have been made, users will be prompted to confirm their actions before the projects are carried over.

Step 2: Convert Appropriate MTP (CE) Records to TIP (T) Records

Once the carry-over step is complete, TPB staff will provide your agency with a list of MTP records (both regionally significant or not) that have completion years that fall within the active years of the draft TIP. If no corresponding record exists in the current draft TIP data, then TPB staff will work with the agency to convert the MTP record to a TIP record. If a related record does exist in the draft TIP data, TPB staff will work with agencies to ensure that all critical data from the MTP record is reflected in the TIP record before marking the MTP record for archiving (effectively ending the CE record in the same way that marking it as "complete" or "withdrawn".

Federal Requirement

Federal regulations regarding the metropolitan TIP state that all *regionally significant* projects scheduled to be complete by the out-year of the TIP must show full funding for completion of the project.

For regionally significant projects, it is each agency's responsibility to meet the federal requirement showing full funding through the completion of construction. The year of completion cannot be adjusted for these records since they are included in the air quality conformity analysis. For non-regionally significant projects, the agency has the option to either show full funding or to modify the estimated year of completion.

INSTRUCTIONS: CONVERTING MTP (CE) RECORDS TO TIP (T) RECORDS

Before converting an MTP (CE) record into a TIP (T) record, please verify that there are no TIP records already associated with the MTP record that cover the scope of work either of the MTP record as a whole or that covers the scope of the proposed new TIP record. If no such record exists, then you may follow the steps described below.

1. Open the version of the MTP record that you wish to convert to a TIP record. For this process, it should be the 50-00 version of the record.
2. Click on the vertical ellipsis (⋮) located to the right of the blue Save/Submit/Amend button in the upper right corner of the record and select "Duplicate Project".
3. In the white dialog box that pops up, select the Plan Cycle the duplicate record should be created in. For this process, it should be the TIP / TIP 2026 cycle listed under the Draft cycle options.
4. Select the initial adoption (only option available to select from) 26-00 in the Plan Revision drop-down.

5. For the Relationship Type, select “TIP Project” to indicate that this is a TIP project in relation to the original MTP record, then click “Continue”.
6. On the Confirm Destination Revision to Duplicate panel, leave the default radio button checked indicating that the PIT should assign a new auto-generated ID for the new record, then click “Continue”.
7. Edit the new TIP record as necessary
    - On the IDS/CONTACTS tab, enter the originating MTP (CE) ID under “LRTP ID#” and click “Add ID”
    - When finished with all edits and click “Save Changes”.
8. Return to the original MTP record and click “Edit”.
9. Scroll down to the Change Reason section and select “Project Changed”.
10. A new field labeled “Change Reason Details” will appear. From the drop-down menu provided, select “Converted to TIP Project”.

Navigating Project InfoTrak

The Project InfoTrak platform gives users a few different ways to find the records they need to update: the Dashboard, the Projects record listing page and Advanced Search Menu, or the Quick Search by ID. This section provides guidance on how to best use these tools to navigate the system and get to the right records as efficiently as possible.

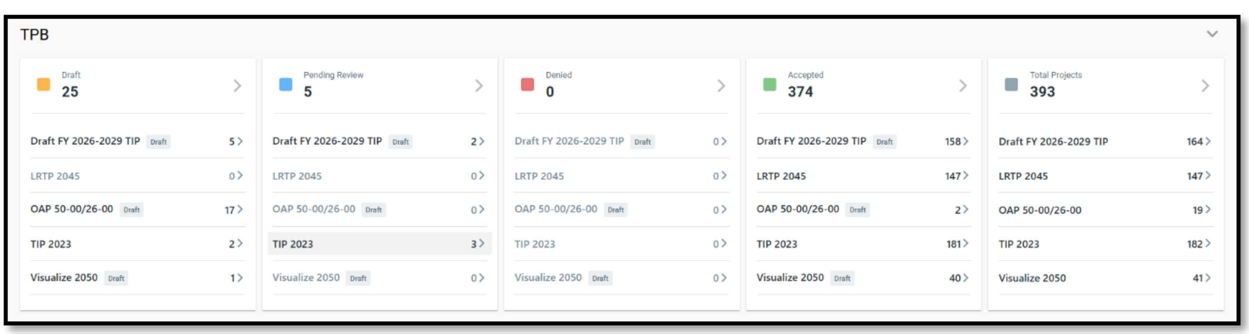
DASHBOARD

Upon signing into Project InfoTrak, users are presented with the dashboard shown in Figure 3. The dashboard is divided into five “buckets” of records grouped by status: Draft, Pending Review, Denied, Accepted, and Total (explained below). Each bucket lists any active and draft plan cycles like the MTP and the TIP. Click on any of the bucket headers to view a listing of all agency records matching that status, as described below. Click on

Figure 3: Project InfoTrak Dashboard

any of the listed plan cycles below a status heading to see only the agency’s records from that plan with the corresponding status.

- Draft – Records in this status may be edited by agency users with their updates or amendments before submitting them to TPB staff for review.



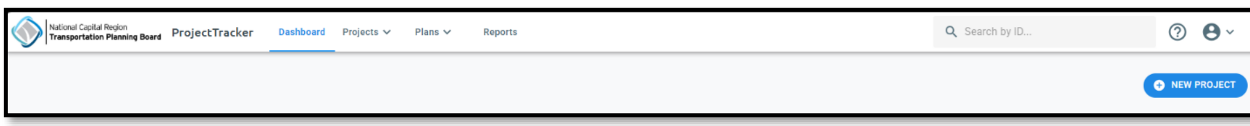
- Pending Review – When users submit their records, the records will move to this status where TPB staff will review the updates for approval or denial.
- Denied – If TPB staff see any reason to not accept the changes that were made to a record, it will show up as denied. Records that appear in this bucket may be edited and re-submitted to TPB staff for another round of review.
- Accepted – Records in this status have been reviewed and accepted by TPB staff. When in the accepted tab, records may be amended or carried over to another plan cycle or revision. Please note that “Accepted” does not mean “Approved”.
- Total Projects – This column provides a cumulative total of all records in a plan cycle across statuses.

The dashboard features an optional banner space that TPB staff may use for posting important announcements or other general information.

MAIN MENU

The menu shown in Figure 4 is featured at the top of every screen.

Figure 4: Main Menu Bar



The primary menu options are:

- Dashboard – returns users to the Dashboard “home page”
- Projects – provides access to the Projects Index and Advanced Search Tool
- Plans – This option is used primarily by TPB staff admins. Documentation of this is not provided in this guide.
- Reports – Provides access to a variety of pre-configured reports, many with a wide variety of customizations available.

The menu bar also includes:

- A “Search by ID” tool for quick access to specific records.
- An email link to our platform provider’s Help Desk service
- An account icon that provides options for users to edit their notification preferences and to log out.

There is also a New Project button that will be covered later in this guide. The following sections will describe actions available under the Projects and Reports menu items. The Plans menu item is primarily for system admins and is not covered in this guide.

Search by ID Tips

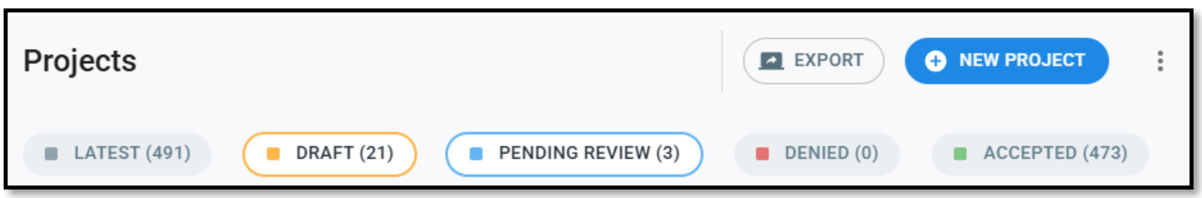
- This search works on any IDs that appear in the Contacts/IDs tab, including Project ID (T, CE, and G records), Agency Project ID/UPC, and Conformity IDs.
- To edit a list of records that start with the same characters (e.g. T3211, T3212, T3215,...) type in those first common characters and wait until a pop-up menu shows the first few records and then click “VIEW ALL RESULTS” to see a full-screen index of those records.

PROJECTS INDEX AND THE ADVANCED SEARCH TOOL

You can access the Projects index page via the Projects menu or by clicking on one of the specific draft or approved Plan cycles under one of the five buckets described previously. The list of projects here is dynamic and quickly responsive. The Advanced Search panel on the left side of the screen is an incredibly powerful tool with a set of standard filters on plan cycle/revision, project, and funding data, plus a complete set of customizable data filters, and the ability to include as many additional columns of data to the results index as needed

By default, the index displays the first 50 rows of all records under the user's agency's control. At the bottom of the page, users may adjust the number of records shown per page to 100, 200, or ALL. As shown in Figure 5, the top of the Projects index includes a list of record statuses similar to those seen on the Dashboard page, with "Total" being replaced by "Latest," which now appears first. However, these buttons do not behave in the same manner as those on the dashboard – these buttons are actually filters. "Latest" is the default filter which stands alone and always displays all records that meet the search criteria provided. The other four filters can be turned on or off in any combination. For example, in Figure 5, the "Draft" and "Pending Review" are turned on to provide a list of all records matching the search criteria that have not yet been accepted or denied.

Figure 5: Record Status Filters



After employing the Advanced Search criteria and desired record status filters and including any additional columns, users can either click on any row to see the detail page for that record or. generate an Excel file of the entire resulting index of records by using the "Export" button..

The vertical ellipsis (⋮) to the right of the "New Project" button allows TPB staff to perform some bulk actions to records, such as deletions, status updates, and the carry-over of records to a new cycle. Aside from the Carry-Over option which has been covered previously, these actions are generally not available to agency users and should not be used unless directed to by TPB staff.

One final note on the Projects Index page: unless filtered out by the Plan Cycle option or by using the "Change Reason" under Custom Filters, the index will include records that the agency has already marked as "Completed" (indicated by a green circled checkmark) or "Removed" (indicated by a red circled slash). Until a cycle has been fully approved, removed and completed records will continue to be available to review

Editing Records in Project InfoTrak

The Record Detail Page provides access to all data about a project or program and any other versions of that record. If reached by the "Search by ID…" tool or if no specific Plan Cycle was selected, the default version will be the newest version of the record. As mentioned previously, records may describe discrete projects, ongoing programs, or groupings of projects. For the sake of brevity, the instructions in this section will simply use the word "project" as a shorthand for any of these types of records.

To make updates users must click the "Edit" button located at the top right of the record page to the left of the blue "Amend Project" button. While in edit mode, that blue button will read "Save Changes" and users must click that to save their edits. A pop-up window will appear if users try to navigate away from a record while in the edit mode warning the user that changes will be lost. Users may also cancel the edit mode by clicking "Discard."

Please note that projects can only be edited while the project is in Draft or Denied status. There are some exceptions to this rule:

- Data on the ID/Contacts, Map, and Related Projects tabs can be edited regardless of status.
- Fields in the Project Administration sub-section can only be edited by TPB staff.

RECORD DETAIL PAGE

At the top of each Record Detail Page are a set of ten tab headings:

- Programming
- Obligation
- Map
- IDs/Contacts
- Attachments
- Revision History
- Project Questions
- CMP Documentation
- Component Projects
- Related Records

Programming Tab

The Programming Tab is the main source of information for a project. This tab includes data fields about project administration, general project and schedule information, location information, conformity information, programming information, change reason details, and prior record versions.

There are many instances on this tab where the values entered for a given field will change the options available, requirements, and even visibility of other fields. These will be explained as best as possible in the pages that follow.

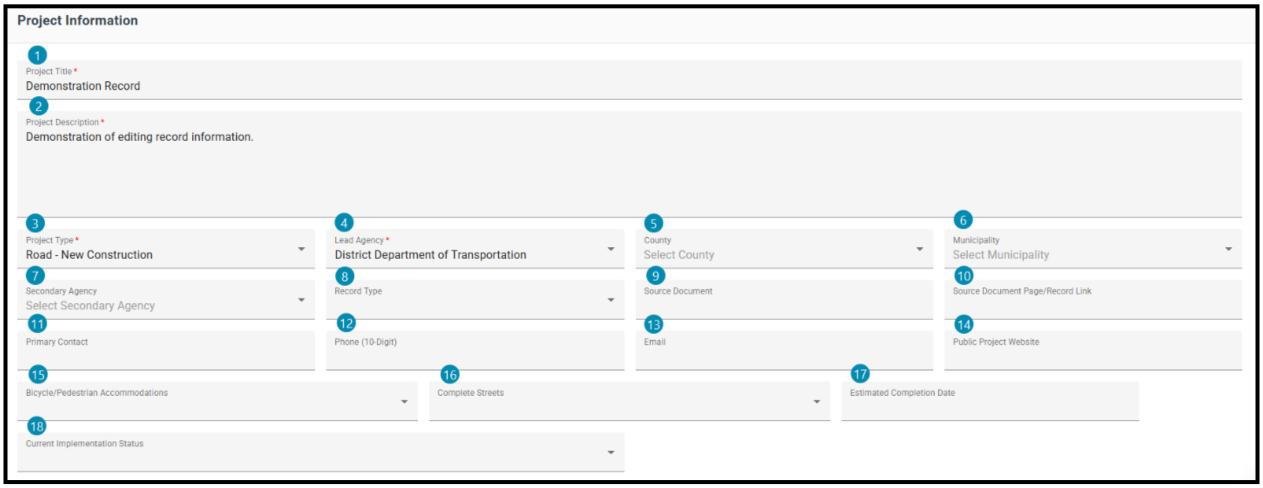
PROJECT ADMINISTRATION

The first three fields: Plan Revision, Region, and ID are all determined when the record version is established. The TPB Project Title field is added by TPB staff to establish consistent project naming conventions across multiple agencies to be used in Visualize 2050 publications. It has no impact on an agency's assigned Project Title which may need to remain consistent with other documentation including the US DOT's Financial Management and Information Systems (FMIS).

PROJECT INFORMATION

This section contains data details on the project’s title, description, type, agency, jurisdiction(s), schedule, status, and more.

Figure 6: Project Information Section



1. Project Title .... Provide a brief, public-friendly name for the project.
2. Project Description .... Describe the project as clearly as possible. Use public-friendly phrasing and avoid technical jargon where possible. Do not use this field to journal actions taken by amendment or similar processes. These are tracked in the Narrative Description of Changes in the Change Reason Details section below.
3. Project Type .... Select the most appropriate option to classify the major purpose or nature of the project.
4. Lead Agency .... The agency that is submitting the project information. This is automatically filled in defined by the user’s agency.
5. County .... Indicate which county or counties the project is located within. Multiple values may be selected.
6. Municipality .... Select the municipality(ies) in which the project is located. Multiple values may be selected.
7. Secondary Agency .... Other agency working in conjunction with primary agency.
8. Record Type .... Please indicate whether this record is a discrete project, ongoing program, or grouping record. See page 5 for further explanation of these record types.
9. Source Document .... Provide the name of the official budgetary document that authorizes funds to be expended on the project.
10. Source Document Link .... Provide a direct link to the project listing in the document referenced above. If a direct link to the individual project is not possible, please provide a reference ID or page number in the Source Document field to aid in its location.

11. Primary Contact .... Name of project manager or point-of-contact for more information.

12. Phone .... Phone number for project manager or point-of-contact for information.

13. E-mail .... Email address for project manager or point-of-contact for information

14. Public Project Website .... Public-facing website address for additional information. These are usually established for larger-scale projects and this data may not be available for every project.

15. Bicycle/Pedestrian Accommodations . Select the appropriate response to indicate whether bicycle and/or pedestrian accommodations are: Included, Not Included, or Not Applicable.

16. Complete Streets .... Use the dropdown menu to indicate if the project: Advances the jurisdiction's Complete Streets policy goals, is Exempt from the jurisdiction's Complete Streets policy, or if the Complete Streets policy is not applicable to this type of project.

    If the Exempt option is selected, a new field becomes visible asking the user to indicate why the project (which might otherwise advance Complete Streets goals) is exempt: Absence of Need, Accommodation contrary to jurisdiction or agency policies/plans, Environmental, Excessive Cost, Grandfathered, Historic Preservation, or User group prohibited by law.

17. Estimated Project Completion .... Estimated year the project will be open for use or implemented.

18. Current Implementation Status .... Indicate the current status of the project using one of the project milestones or situations in the dropdown menu.

    If "Project/Contract Complete" or "Project Close-Out" are selected, a new field titled "Actual Completion Date" will become visible immediately to the left of this field asking for the year that the project was completed.

CONGESTION MANAGEMENT INFORMATION

The two fields in this section are only required for roadway capacity-increasing projects.

19. Traffic Congestion Conditions .... Indicate if the congestion conditions being addressed by this project are recurring or non-recurring.

20. Congestion on Other Facility .... If the congestion conditions defined above are occurring on a separate facility from the one identified in the project title or location, please identify it here.

ENVIRONMENTAL INFORMATION

This section asks for the status of NEPA documentation and environmental mitigation activities.

21. Environmental Review Document .... Select the type of NEPA documentation required, if any.
22. Environmental Review Status............... Select the status of any required NEPA documentation
23. Environmental Mitigation .... Multi-select to identify any mitigation activities.

LOCATION INFORMATION

Use this set of fields to identify the facility and limits included in the scope of the project. The fields available will change based on the System and Location Type selected. Figure 7 below shows the most commonly visible fields. Multiple location records may be added, so there is no need to "double-up" facilities into one location record. Use the Conformity Information fields in the next section to define the project for air quality conformity modeling. The table below shows Location Types available for each System.

Roadways	Local Streets	Transit	Non-Infrastructure/NA
• Bridge	• Bridge	• Not Location Specific	• Other
• Intersection	• Intersection	• On Road	• N/A
• Not Location Specific	• Not Location Specific	• Own ROW	
• Road Segment	• Street Segment	• Point Location	
• Various Locations	• Various Locations		
• Interchange	• Trail/Path Segment		

Figure 7: Location Information (Roadways)

24. System .... Select from the menu to indicate if the project is on: Roadway System (Functional Class 1-3, 5); Local Street System (Functional Class 4); Transit System; or Non-Infrastructure (None of the above)
25. Location Type .... Select the best option to describe the project from the list made available.
26. Route .... Identify the interstate, national, or state highway designation from the dropdown menu. The routes are pre-populated based on the county(ies) selected in field 5. This field only appears when "Roadways" or "Transit" are selected for System.
27. Facility Name .... Full name of facility; e.g. "Capital Beltway," "East Street" or "Red Line". To the extent possible, this field should be limited to actual street names or transit routes. If the project or program is not road, trail, or transit route-related, the Project

Title and Description fields will be sufficient to identify the project and this field, along with associated limit fields should not be used. Do not re-enter the route ID in this field name or it will appear in documentation as “US 1 US 1 Richmond Highway”. Please don’t do this. Please.

28. From/Primary..The beginning project limit or location of a spot improvement

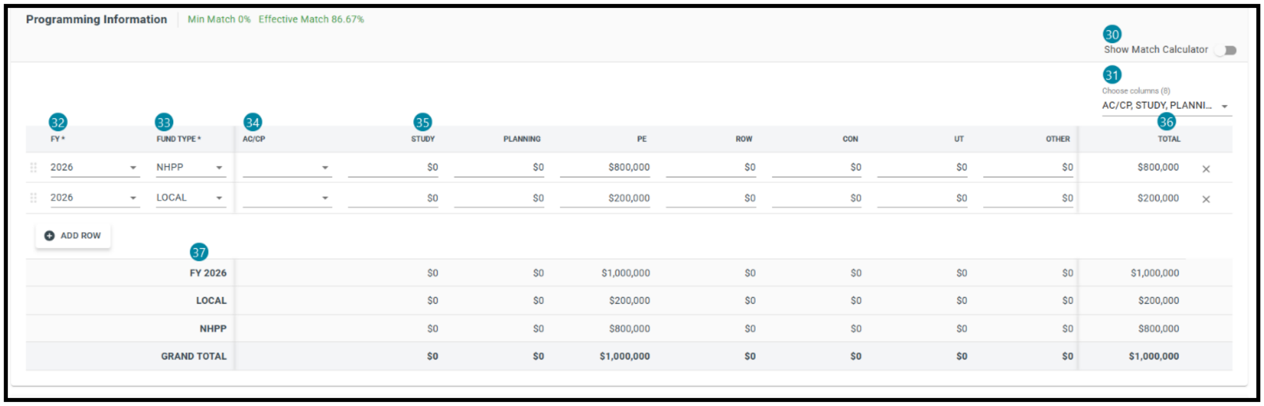
29. To/Secondary..Terminal project limit

CONFORMITY INFORMATION

At this time, conformity data may not be edited. More details on this section will be provided later.

PROGRAMMING INFORMATION

Figure 8: Programming Information Block



30. Show Match Calculator.........................Switch this on to reveal a fund matching calculator. Enter the total amount of funding, the primary source of funding, the match percentage, and the matching source. The calculator will calculate the primary amount and match amount. Next enter the fiscal year and phase. Finally, click the add funding button and those two-line items will automatically be added to the programming block.

31. Choose Columns ....Check or uncheck options in the dropdown menu to show or hide phase columns in the programming block.

32. FY ....Enter the federal fiscal year in which the funds are programmed for obligation. You may program funds beyond the window of the current TIP, which will be included in the Grand Total summaries below.

33. Fund Type ....See the next section for a definition of and links to resources for more information on each funding source.

34. AC/CP..If your agency is programming Advanced Construction (AC) funds on a project the following conditions must be met:

35. Any amounts designated as AC must note that in the pull-down menu in this column.

36. The source for those funds must be listed as the anticipated federal source that the agency intends to use to pay back the state coffers.

37. For any amount of AC programmed, there must be an equal amount of ACCP scheduled in the program. These amounts should be demonstrated within a year or two at most, of the initial AC programming.

38. Phase ....Place the programmed funds in the appropriate column depending on which phase they are programmed for: Study, Planning, PE – Preliminary Engineering, ROW – Right of Way Acquisition, CON – Construction, UT – Utilities, Other – Use for program operations, vehicle or other purchases, construction of maintenance facilities, debt service, or other purposes that don't comport to one of the phases above

39. Total..This is a calculated field, summing the line item.

40. Grand Total Block...................................This block provides calculated totals by FY, source, and a grand total. Note: this provides a running total of all fiscal years, prior to, including, and beyond the program window of the TIP.

CHANGE REASON DETAILS

41. Change Reason......................................This field must be updated with each adoption, amendment, or modification. Indicate whether the project is new, changed, completed, or removed. If the Project Changed option is selected, new fields become visible below the row of radio buttons (described below).

42. Change Reason Details.........................Options available are: Not Active, Cost Change(s), Location/ Limits Change(s), Pending Financial Close Out, Programming Update, Schedule Change(s), and Scope Change(s).

43. Other Change Reason Details..............This provides a "write-in" option for any change reason details that don't match any of the options above.

44. Narrative Description of Changes........An option for further notes. Use this instead of the Description field if you wish to journal any amendment or modification changes.

PRIOR PROJECT REVISION COMPARISON

The prior project revision comparison box displays any changes that have been made since the previous version of the record. This section summarizes changes made to the current change reason details, project changes, funding changes, federal project cost, and total project cost.

Other Tabs

This section describes the remaining nine tabs atop the Record Detail Page.

OBLIGATION

This tab provides all available federal obligation data obtained from FMIS. This data is only available if a valid FAP ID has been entered on the IDS/Contacts tab.

MAP

Please follow the following guidelines using this GIS-interface tool:

- Any project that can be mapped to a roadway, transit, or bike/ped facility should be mapped.
- Point location identifiers should be used for specific location installations, bridges, interchanges, and intersections.
- Line location identifiers should be used for road, transit, or trail segments. Do not use lines for interchanges, intersections, or bridges unless the scope and limits of the project specify a significant segment adjacent to those points.
- Use the “Snap to Road” feature for roadways, or on-road transit and/or bike/ped facilities.
- Do not map studies that are not included in the conformity analysis for construction.
- Do not use the polygon tool for any jurisdiction-wide programs.

IDS/CONTACTS

The fields on this tab provide information on the record’s relationship with other records. Project ID data on this tab is not connected to the Related Projects tab, but these fields are used in the general Search by ID tool at the top of every screen. Any IDs included on this tab will result in this record returning in the search results when using that tool. IDs available are: Federal Project # (also known as a Federal Aid Project (FAP) ID), TIP ID, LRTP ID, Agency Project ID, Component ID (Agency IDs for sub-projects in Grouped Project records), Conformity ID (numerical IDs only, not the alpha-numeric Conformity Codes), and OAP ID.

ATTACHMENTS

Any desired additional documentation may be uploaded using the tool on this tab. Examples of possible uses include: financial plans, grant award notices, detailed project plans, STIP amendment approval notices, maps or other schematic illustrations, etc.

REVISION HISTORY

This tab provides access to previous versions of this record in past plans or TIPs, or previously amended versions.

PROJECT QUESTIONS

The questions on this tab address the goals identified in the TPB's Vision, Regional Transportation Priorities Plan (RTPP), Visualize 2045 Aspirational Initiatives and other TPB or COG-identified goals listed in the Technical Inputs Solicitation Policy Guide for Visualize 2050 and the FY 2026–2029 TIP. The 21 questions on this tab are listed below. The default response for unanswered questions is "No Answer". Please choose Yes or No and/or select the most appropriate response(s) from the drop down menus.

1. This project promotes non-auto travel or can be expected to reduce VMT in the region.
2. Identify all travel mode options that this project provides, enhances, supports, or promotes.
3. This project improves accessibility for historically transportation-disadvantaged individuals (i.e., persons with disabilities, low-incomes, and/or limited English proficiency) Is this project physically in an Equity Emphasis Area (EEA)?
4. Please provide additional written information that describes how this project further supports or advances equity as described by the TPB July 2020 resolution.
5. Indicate if the project begins or ends within an activity center, connects two or more centers, and/ or promotes non-auto travel within one or more centers
6. Does this project begin or ends in an Activity Center?
7. Does this project connect two or more Activity Centers?
8. Does this project promote non-auto travel within one or more Activity Centers?
9. Does this project connect an Equity Emphasis Area to an Activity Center?
10. Does this project contribute to enhanced system maintenance or preservation?
11. Does this project reduce travel time on highways and/or transit without building new capacity, (e.g., ITS, bus priority treatments, etc.)?
12. Is this project expected to significantly reduce fatalities or injuries among motorists, transit users, pedestrians, and/or bicyclists?
13. Is the project expected to contribute to reductions in emissions of criteria pollutants, specifically, to attainment of ozone levels consistent with the National Ambient Air Quality Standard (NAAQS)?
14. Is this project expected to contribute to reductions in emissions of greenhouse gases by 50% below 2005 levels by 2030?
15. If the answer to the previous question regarding contributing to greenhouse gas emission reductions was yes, then how is this project anticipated to reduce emissions? If 'No', please describe how the project will mitigate increased greenhouse gas emissions or vehicle miles traveled.
16. This project enhances, supports, or promotes the following freight carrier modes (select all that apply)
17. This project enhances, supports, or promotes the following passenger carrier modes (select all that apply)
18. Please check each initiative that is implemented by this project.
19. Please provide additional written information that describes how this project further supports or advances the TPB Aspirational Initiatives.

20. Please provide additional written information that describes how this project further supports or advances other regional goals or needs.
21. This project supports the following planning factors (select all that apply).

CMP DOCUMENTATION

This tab appears only for records in the TIP and the questions here must be completed or all projects that increase capacity for single-occupant vehicles on roadways. When required, the questions on this tab address the federal requirement known as the Congestion Management Process (CMP). Please see www.mwcog.org/CMP for more information. The initial series of questions determine if complete documentation of the CMP is required, which will be revealed for capacity-increasing roadway projects that are not exempt from the requirement.

1. Does this project increase capacity on a limited access highway or other principal arterial?
    a. If yes, please move on to the Exemption question that is made visible.
    b. If no, select “CMP Documentation is not required from the CMP options below, and the tab is complete.
2. Select as many of the criteria that exempt the project from the CMP requirement (listed below) or indicate that none are applicable. If option f is selected, then select “CMP Documentation is required.” This will make five additional questions appear (3-7 below) that make up the CMP Documentation form.
    a. Construction costs for the project are less than $10 million
    b. The number of lane-miles added to the highway system by the project is less than one
    c. The project consists of studies, planning, or preliminary engineering activities only and is not funded for construction in the TIP
    d. The project is an intersection reconstruction or other traffic engineering improvements, including replacement of an at-grade intersection with an interchange
    e. The project will not use federal funds in any phase of development or construction (100% state, local, and/or private funds only)
    f. None of the above apply to this project
3. Indicate whether the proposed project's location is subject to or benefits significantly from any of the following in-place congestion management strategies.
4. List and briefly describe how the following categories of (additional) strategies were considered as full or partial alternatives to single-occupant vehicle capacity expansion in the study or proposal for the project.
5. Could congestion management alternatives fully eliminate or partially offset the need for the proposed increase in single-occupant vehicle capacity? Explain why or why not.
6. Describe all congestion management strategies that are going to be incorporated into the proposed highway project.

7. Describe the proposed funding and implementation schedule for the congestion management strategies to be incorporated into the proposed highway project. Also describe how the effectiveness of strategies implemented will be monitored and assessed after implementation.

COMPONENT PROJECTS

This tab may be used to list sub-projects of Grouped Project records. Additional details on this feature will be made available in future documentation.

RELATED PROJECTS

This tab provides connecting links to related projects. The relationships here can either be defined automatically when a record is created from another record or manually by using the "+Link Project" button. When the Link Project dialog box is shown, define the relationship between the records, then search for the record by entering the related Project ID for the related record, and clicking on that ID in the search results. To save the link, click the blue "Link Project" button.

Users can access any related projects by clicking on the record shown.

Please be sure to click "Save changes" when finished editing.

Reports

There are 29 report and data export options found under the Reports menu. This guide will only provide a brief description and instructions for three of the most common reports that agency users might find helpful. The remainder will be covered in more comprehensive user documentation that will be made available in the future.

PROJECT LIST

The Project List generates a list of projects including summary funding amounts by phase and fiscal year.

- Format: HTML-based customizable table that can easily be exported to Excel.
- Required filters: Plan Cycle
- Optional filters: Plan Revision, Additional Plan Cycle, Additional Plan Revision, Region, Review Status, Project ID (only one ID per report), Lead Agency, Project Type, County, Municipality, Title/Description (this works with partial word searches like "Purple" to find any projects associated with the Purple Line), Contact Name, Funding Type, Fiscal Year.
- Include Additional Columns allows users to customize the Project List report by adding as many additional fields to the results as desired.
- Custom Filters allows users to apply additional filters using almost every data field available including location data, conformity data, CMP data, schedule information, and much more. These filters look for exact matches and work best for fields that have pre-defined data to select from. Open-ended text box responses can be difficult to match unless the complete wording is always consistent.

PROJECT OVERVIEW

This report option generates a formatted one-project-per-page report that includes general project and funding information, mapped location (where applicable), and change reason(s). These are primarily used by TPB staff for generating TIP project reports for adoptions, amendments, and administrative modifications.

- Format: HTML-based report that can be printed or exported/saved as a PDF in either portrait or landscape orientation.
- Required filters: Plan Cycle, Order by
- Optional and custom filters behave as listed above for Project List reports. Additional data fields cannot be added to this report.

PROJECT DESCRIPTION

This report option generates a formatted PDF that includes most data fields.

- Format: Pre-defined PDF with a Visualize 2050 header. This report cannot be customized.
- Required filters: Plan Cycle, Order by
- Optional and custom filters behave as listed above for Project List reports. Additional data fields cannot be added to this report.