

APPENDIX A – Preparation Guidelines for Project Study Report-Project Report

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APPENDIX A – Preparation Guidelines for Project Study Report-Project Report

ARTICLE 1 Overview

Reference Information

Some of the references found in this appendix have hyperlinks that connect to Caltrans intranet pages which are not displayable to the general public. Until such time that the specific reference becomes available on the internet, the user will have to contact their district liaison, Caltrans project manager, or the appropriate Headquarters division to inquire about the availability of the reference.

Use of Project Study Report-Project Report

A project must meet the criteria specified in [Chapter 9](#) – Project Initiation to use a combined project study report-project report (PSR-PR). The PSR-PR satisfies the requirements for both the project initiation document (PID) and the project report (PR) and, as such, must meet the requirements in [Chapter 9](#) – Project Initiation and [Chapter 10](#) – Formal Project Studies.

Both Headquarters and the district use the PSR-PR as the primary project reference document and, as such, the need for accurate and complete project information is essential.

Preparation of Project Study Report-Project Report

Article 2 presents the template that can be used for the PSR-PR. Use [Appendix L](#) – Preparation Guidelines for Project Study Report and [Appendix K](#) – Preparation Guidelines for Project Report for guidance in preparing the PSR-PR. Use checklists discussed in [Appendix L](#) – Preparation Guidelines for Project Study Report to properly scope the project.

The template was created for broad application and, as such, portions of the template may not strictly apply to all transportation projects. The template should be modified to include or exclude sections so that pertinent project deficiencies, issues or coordination are clearly presented. The preparer of the report should evaluate the

number of the alternatives and the complexity of the issues to determine whether to organize the information by alternatives or issues. The space for filling in various sections of the template is condensed for practical viewing of the template. As appropriate, each section can be expanded to accommodate necessary information.

Approval of Project Study Report-Project Report

The District Director (or Deputy District Director if identified in Caltrans' delegation of authority) is responsible for approval of the PSR-PR.

Distribution of Project Study Report-Project Report

Two copies of the approved report shall be sent to:

Headquarters Division of Design
Office of Project Development Procedures
Attention: Design Report Routing
Mail Station #28

For SHOPP projects:

One copy of the unsigned report shall be sent to the appropriate Headquarters SHOPP program advisor. Descriptions of the SHOPP programs and the corresponding Headquarters SHOPP program managers and advisors can be determined from: [SHOPP Programs and Program Managers](#).

One copy of the approved report shall be sent to the appropriate Headquarters SHOPP program advisor.

Five copies of the approved report shall be sent to:

Headquarters Division of Engineering Services
Program/Project & Resource Management
MS 9-5/11g

ARTICLE 2 Template

This article is a template for the project study report-project report. When using the template, delete any italicized text within the body of the document. The italicized text provides instructions for template users and does not provide any value to the final document. If applicable and approved by the Headquarters SHOPP program manager, the preparer may modify an existing PSSR form to use as a combined document.

The template is located at:

<http://www.dot.ca.gov/hq/oppd/pdpm/templates/apdx-a-template.docx>