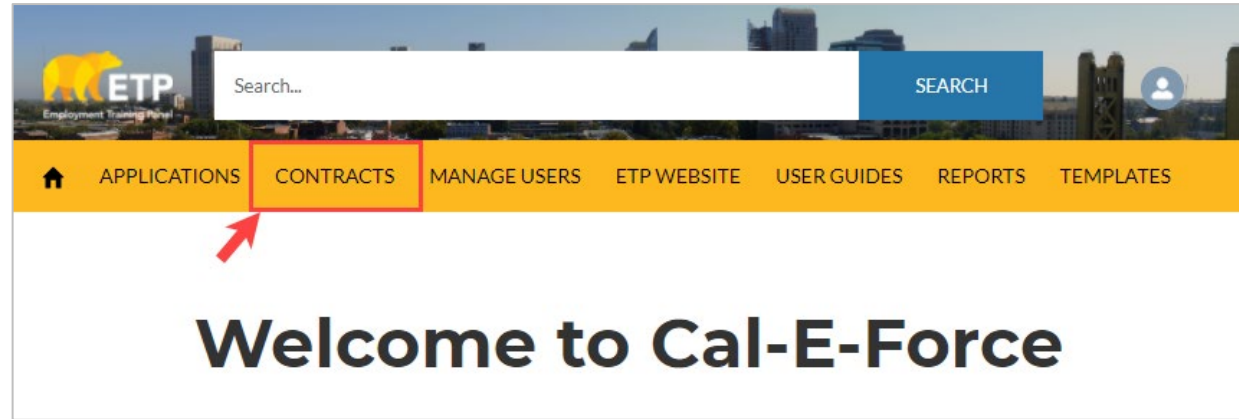


CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

LOCATING AND COMPLETING THE REQUEST REVISION FORM

1. At the top of the landing page, select the **Contracts** button on the button bar



2. Click on the **View** hyperlink for the contract in which you would like to submit a revision request

The system will take you to that contract's details page

The screenshot shows the 'Contracts' page in the Cal-E-Force system. The 'CONTRACTS' button in the top navigation bar is highlighted with a red box. The 'View' hyperlink for the first contract in the table is highlighted with a red box and a red arrow pointing to it.

	Contract Nu... ↑	View Contr... ↓	Performanc... ↓	Account Name ↓	Status ↓
1	Contract 1	View	3.55%	Account 1	Contract Executed
2	Contract 2	View	0.57%	Account 1	Contract Executed

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

3. Select the **Request Revisions** button on the button bar at the top of the Contract Details Page
The Request Revision form will popup



ENROLL TRAINEES UPLOAD TRAINEES ADD HOURS UPLOAD HOURS UPLOAD CBT HOURS UPDATE ROSTERS ADD CBT CLASS UPLOAD CBT CLASS CREATE INVOICE **REQUEST REVISION** ADD WORKPLACE

4. Please read and check the box to acknowledge the statement.

Then click the **Next** button.

Note: In order to move on to the next step, you must accept the acknowledgement.

ETP contract revisions can only be made upon mutual agreement by all parties and cannot be made after termination of the contract.

To proceed, please acknowledge you understand the following:

- All revision requests must be submitted as early as possible and prior to the end of the contract term.
- Requests must include justification. Requests received without a justification will be returned and closed without action and a new request will need to be submitted.
- All applicable required documentation must be provided (i.e. Collective Bargaining Agreement Support).
- Any request submitted by an Authorized Third Party must be reviewed and approved by the ETP Contractor
- ETP is unable to consider contract revisions that fall outside of current ETP Policy.
- Contract revision requests may be considered based on various factors, including the Contract status when the request is received.

Please note, if the revision impacts invoicing, all invoices will be on hold for this Contract until the revision status is Executed. If you have questions or need more information, please contact your monitoring analyst.

1 I acknowledge that I understand the statements above.

2 **NEXT**

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

5. From the popup, select the checkbox(es) next to each request(s) that may apply


Then select all that applies and **Next** button

*Note: You may exit at any point by clicking the **X** at the top right hand corner and it will be saved in draft mode*

*To edit your draft revision, please refer to **Editing Draft Revision** guide*

Request to Revise the Contract (check all that may apply)

- Contractor Name
- Revise Term Start Date
- Revise Term End Date
- Add or Delete Job Number (Except for Apprentices)
- Expand or Reduce Estimated Number of Trainees in a Job Number
- Change the trainee occupation in a Job Number
- Redistribute the Estimated Number of Trainees Funding between Job Numbers
- Add or delete training courses identified in Exb. B Menu Curriculum
- Revise Range of Hours so long as there is not change to the per trainee cap on hours
- Add/Edit Health Benefits to wages
- Revise Standard Contract Language
- Revise Subcontractor Information
- Revise Participating Entities/Workplace
- Revise Waiver Information
- Revise Physical/Mailing Address
- Revise Primary Contact Information
- Other

 **NEXT**

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

6. Complete all required fields as prompted from your selection

Note: Each request will prompt different requirement fields

Click on the link to be directed to the section

- [Contractor Name](#)
- [Revise Term Start Date](#)
- [Revise Term End Date](#)
- [Add or Delete Job Number \(Except for Apprentices\)](#)
- [Expand or Reduce Estimated Number of Trainees in a Job Number](#)
- [Change the trainee occupation in a Job Number](#)
- [Redistribute the Estimated Number of Trainees Funding between Job Numbers](#)
- [Add or delete training courses identified in Exb. B Menu Curriculum](#)
- [Revise Range of Hours so long as there is not change to the per trainee cap on hours](#)
- [Add/Edit Health Benefits to wages](#)
- [Revise Standard Contract Language](#)
- [Revise Subcontractor Information](#)
- [Revise Participating Entities/Workplace](#)
- [Revise Waiver Information](#)
- [Revise Physical/Mailing Address](#)
- [Revise Primary Contact Information](#)
- [Other](#)

7. Upload all files under **Supporting Document(s)**

*Note: Certain documents are **required** to be submitted for the change request (i.e. Subcontractor Agreement, Std. 204/205)*

Should the required document be missing, there may be a delay in processing time

✓ SUPPORT DOCUMENT(S)

Upload Supporting Documents

 **UPLOAD FILES** Or drop files

Last file uploaded:

None

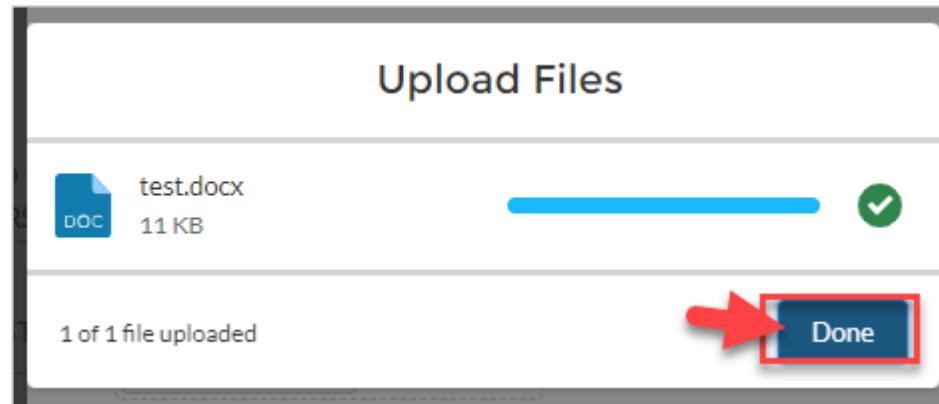
NEXT

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

8. An Upload Files popup will appear to show to progress of the upload

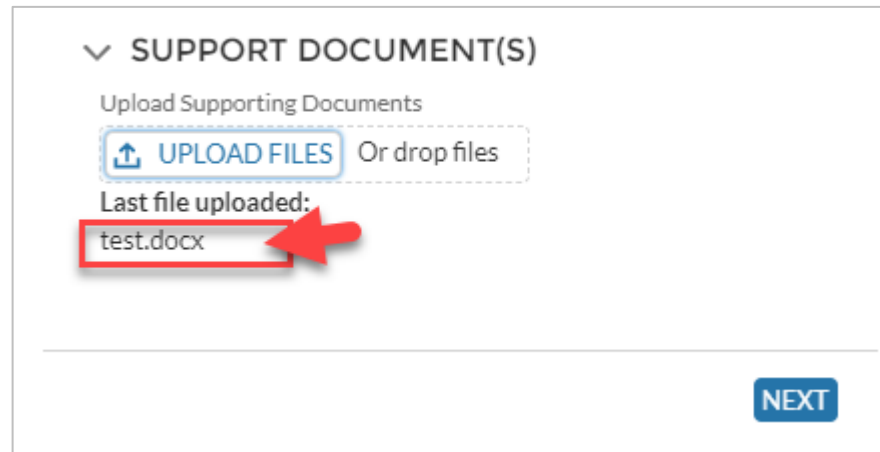
A green checkbox will appear next to the document to show the completion of the upload

Click **Done** to exit screen



9. The file will be listed under **Last file uploaded**

*Note: If multiple files were uploaded, the list will only display the **Last file uploaded***



CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

10. Select the **Next** button to submit the request

*Note: If wish to place the request in draft mode to edit, click the **X** at the top to exit the screen*

The screenshot shows a web form for a 'CONTRACTOR NAME CHANGE' request. At the top right, there is a small blue button with a white 'X'. A red callout box with an arrow pointing to it says 'Select X to place request in draft mode'. The form has two main sections: 'CONTRACTOR NAME CHANGE' and 'SUPPORT DOCUMENT(S)'. The first section includes a 'Current Legal Name' field and a 'Contractor Name Change' field. Below that is a 'Contractor Name Change Justification' text area. The second section is for 'SUPPORT DOCUMENT(S)' and includes an 'Upload Supporting Documents' area with an 'UPLOAD FILES' button and the text 'Or drop files'. Below this, it says 'Last file uploaded: test.docx'. At the bottom right of the form, there is a blue 'NEXT' button. A red callout box with an arrow pointing to it says 'Select Next to submit request'. At the very bottom of the form, the text 'Term Start Date' is visible.

11. Please read and check the box to acknowledge the statement.

Then click the **Next** button.

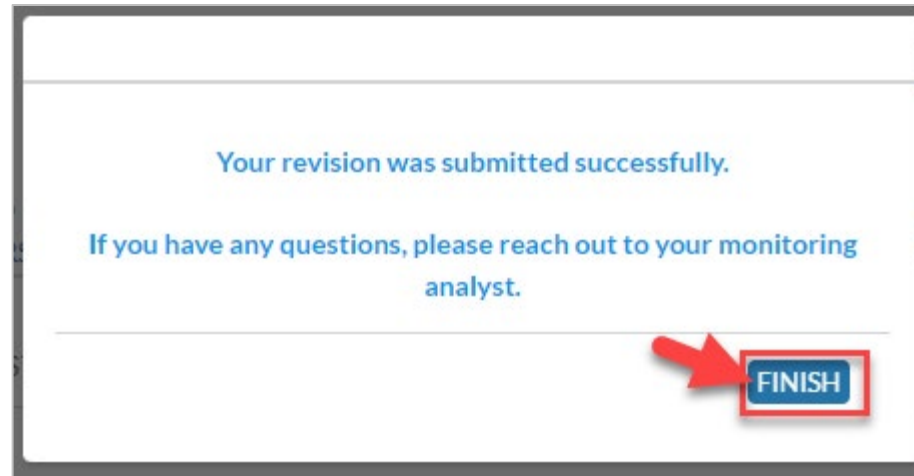
Note: In order to move on to the next step, you must accept the acknowledgement.

The screenshot shows a text-based acknowledgment statement. The text reads: 'By submitting this request as an ETP Contractor or Authorized Third Party, you acknowledge you understand the following:'. Below this are two bullet points: '• You must adhere to the terms and conditions of the current contract, until the contract revision is approved and executed.' and '• You accept the risk for any implementation done prior to contract revision approval and execution. You may not receive reimbursement for such implementation if ETP is unable to approve the revision request.' Below the bullet points is a checkbox with the text 'I acknowledge that I understand the statements above.' A red callout box with the number '1' and an arrow points to the checkbox. At the bottom right of the form, there is a blue 'NEXT' button. A red callout box with the number '2' and an arrow points to the 'NEXT' button.

12. A successfully submitted message will appear

Select the **Finish** button to complete and exit the screen

Note: Reach out to your monitoring analyst should you have any follow up questions



CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

COMPLETING THE REQUIRED PROMPTED FIELDS

CONTRACTOR NAME CHANGE

1. Input the name change for the contractor in the **Contractor Name Change** section

Note: The screen will display the Current Legal Name for reference

✓ **CONTRACTOR NAME CHANGE**

Current Legal Name:

* Contractor Name Change

* Contractor Name Change Justification

2. Input the justification for the change in the text box

Note: Text box has a 5000 character limit.

✓ **CONTRACTOR NAME CHANGE**

Current Legal Name:

* Contractor Name Change

* Contractor Name Change Justification

3. [Return to step 6 to continue](#)

*Note: **Click** on the link to be directed to the section*

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

REVISE TERM DATES

1. Select which term dates (Start Date, End Date, or both) you wish to revise

Request to Revise the Contract (check all that may apply)

- Revise Term Start Date
- Revise Term End Date

2. Select the term date change(s) in the appropriate section from the calendar

If inputting, dates must be formatted as MMM D,YYYY (example: Jan 1,2024) or MM DD,YYYY (example: 01/01/2024)

Note: The screen will display the current term dates for reference

▼ TERM DATES CHANGE

Current Term Start Date: Term Start Date Change

Current Term End Date:

Term Date Change Justification

▼ SUPPORT DOCUMENT

Upload Supporting Documents

[UPLOAD FILES](#) Or drop file

Last file uploaded: None

Calendar: January 2024

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

TODAY

NEXT

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

3. Input the justification for the change in the text box

Note: Text box has a 5000 character limit

▼ TERM DATES CHANGE

Current Term Start Date:

* Term Start Date Change

Current Term End Date:

* Term End Date Change

* Term Date Change Justification

4. [Return to step 6 to continue](#)

Note: Click on the link to be directed to the section

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

JOB NUMBER CHANGES

1. When one, multiple, or all of these revisions are selected, it will prompt a Job Number change

Request to Revise the Contract (check all that may apply)

- Add or Delete Job Number (Except for Apprentices)
- Expand or Reduce Estimated Number of Trainees in a Job Number
- Change the trainee occupation in a Job Number
- Redistribute the Estimated Number of Trainees Funding between Job Numbers
- Revise Range of Hours so long as there is not change to the per trainee cap on hours
- Add/Edit Health Benefits to wages

2. Provide reason for the change in the text box

Note: Only one text box will populate regardless of how many revision request you selected

Text box has a 5000 character limit

▼ **JOB NUMBER CHANGE**

* Details of Job Number Changes

* Job Number Changes Justification

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

3. Input the justification for the change in the text box

Note: Only one text box will populate regardless of how many revision request you selected

Text box has a 5000 character limit

▼ JOB NUMBER CHANGE

* Details of Job Number Changes

* Job Number Changes Justification

4. [Return to step 6 to continue](#)

*Note: **Click** on the link to be directed to the section*

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

PROVIDE REASON AND JUSTIFICATION(S) FOR THE FOLLOWING CHANGES:

1. Select one or multiple of these revision request(s)

Request to Revise the Contract (check all that may apply)

- Add or delete training courses identified in Exb. B Menu Curriculum
- Revise Standard Contract Language
- Revise Participating Entities/Workplace
- Revise Waiver Information

2. Input the details of the change in the text box(es)

Note: A separate text box will populate for each request made

Text box has a 5000 character limit

▼ CURRICULUM CHANGE

* Details of Curriculum Changes

* Curriculum Justification

▼ STANDARD CONTRACT LANGUAGE CHANGE

* Details of Contract Language Changes

* Contract Language Change Justification

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

3. Input the justification for the change in the text box(es)

Note: A separate text box will populate for each request

Text box has a 5000 character limit

▼ CURRICULUM CHANGE

* Details of Curriculum Changes

* Curriculum Justification

▼ STANDARD CONTRACT LANGUAGE CHANGE

* Details of Contract Language Changes

* Contract Language Change Justification

4. [Return to step 6 to continue](#)

*Note: **Click** on the link to be directed to the section*

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

REVISE SUBCONTRACTOR INFORMATION

1. Select all that applies from the Subcontractor change list

▼ SUBCONTRACTOR INFORMATION CHANGE

- Add/Edit Administrative Subcontractor(s)
- Remove Administrative Subcontractor(s)
- Add/Edit Training Subcontractor(s)

2. Click on the links to direct you to the section for the appropriate steps

- [Add/ Edit Administrative Subcontractor\(s\)](#)
- [Remove Administrative Subcontractor\(s\)](#)
- [Add/Edit Training Subcontractor\(s\)](#)

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

ADD/ EDIT ADMINISTRATIVE SUBCONTRACTOR(S)

1. Select the checkbox next to **Add/ Edit Administrative Subcontractor(s)**

▼ SUBCONTRACTOR INFORMATION CHANGE

Add/Edit Administrative Subcontractor(s)

Remove Administrative Subcontractor(s)

Add/Edit Training Subcontractor(s)

2. Choose either **Yes** or **No** in response to the question 'Is there a secondary administrative subcontractor company assisting with your contract?'

If **Yes** is selected, complete the fields that will prompt for the Subcontractor's data

Administrative Subcontractor(s) Changes

Current Administrative Subcontractor Name (Primary):

Current Administrative Cost of Service (Primary):

Current Administrative Subcontractor Description of Service (Primary):

Current Administrative Subcontractor Address (Primary):

* Administrative Subcontractor Name (Primary)

* Administrative Cost of Services (%)

* Is there a secondary administrative subcontractor company assisting with your contract?

Yes
 No

Current Administrative Subcontractor Name (Secondary):

Current Administrative Cost of Service (Secondary):

Administrative Subcontractor Name (Secondary)

Administrative Cost of Services (%)

If 'YES' was selected, then these fields will populate

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

3. Complete all required fields

Administrative Subcontractor(s) Changes

Current Administrative Subcontractor Name (Primary):

Current Administrative Cost of Service (Primary):

Current Administrative Subcontractor Description of Service (Primary):

Current Administrative Subcontractor Address (Primary):

* Is there a secondary administrative subcontractor company assisting with your contract?

Yes

No

Current Administrative Subcontractor Name (Secondary):

Current Administrative Cost of Service (Secondary):

* Administrative Subcontractor Name (Primary)

* Administrative Cost of Services (%)

* Description of Services

Administrative Subcontractor Address (Primary)

* Street Update

* City Update

* State Update

* Zip Code Update

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

4. Upload a new Subcontractor Agreement and any additional supporting document(s)

*Note: A new Subcontractor Agreement is **required**. A missing agreement may cause a delay in the processing time*

With the change of an Administrative Subcontractor, a new Subcontractor Agreement will need to be completed and uploaded below.

Please upload your completed agreement. A missing agreement may delay future payments and revision processing.

▼ SUPPORT DOCUMENT(S)

Upload Supporting Documents

 **UPLOAD FILES** Or drop files

Last file uploaded:

None

5. [Return to step 6 to continue](#)

*Note: **Click** on the link to be directed to the section*

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

REMOVE ADMINISTRATIVE SUBCONTRACTOR(S)

1. Select the checkbox to **Remove Administrative Subcontractor**

▼ SUBCONTRACTOR INFORMATION CHANGE

- Add/Edit Administrative Subcontractor(s)
- Remove Administrative Subcontractor(s)
- Add/Edit Training Subcontractor(s)

2. Select the checkbox to indicate if you wish to **Remove Administrative Subcontractor (Primary)** or **Remove Administrative Subcontractor (Secondary)**

Administrative Subcontractor(s) Changes

Current Administrative Subcontractor Name (Primary):

Current Administrative Subcontractor Name (Secondary):

Current Administrative Cost of Service (Primary):

Current Administrative Cost of Service (Secondary):

Current Administrative Subcontractor Description of Service (Primary):

Current Administrative Subcontractor Address (Primary):

Remove Administrative Subcontractor (Primary)

Remove Administrative Subcontractor (Secondary)

3. [Return to step 6 to continue](#)

Note: Click on the link to be directed to the section

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

ADD/EDIT TRAINING SUBCONTRACTOR(S)

1. Select the checkbox to **Add/Edit Training Subcontractor(s)**

▼ SUBCONTRACTOR INFORMATION CHANGE

- Add/Edit Administrative Subcontractor(s)
- Remove Administrative Subcontractor(s)
- Add/Edit Training Subcontractor(s)

2. To add, click the **Add Training Subcontractor** button

Training Subcontractor(s) Changes



Training Subcontractor(s)

+ ADD TRAINING SUBCONTRACTOR

Subcontractor Name ▼ | City ▼ | State ▼ | Cost of Service ▼

* Subcontractor Changes Justification

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

3. A **New Training Subcontractor** popup will appear

Complete all required fields that are prompt

Select the **Submit** button


New Training Subcontractor

* Subcontractor Name

* City

* State

* Estimated Cost of Service

* Description of Service 

4. Confirm if a subcontractor agreement will be uploaded

If **'Yes'** was selected then go to step 5

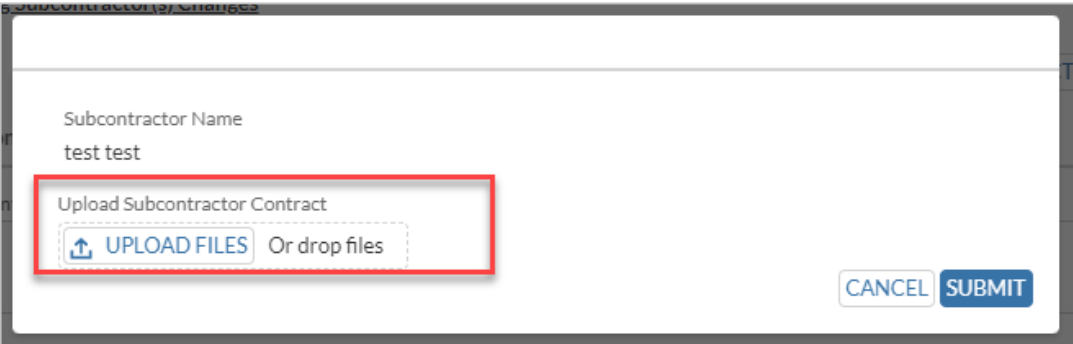
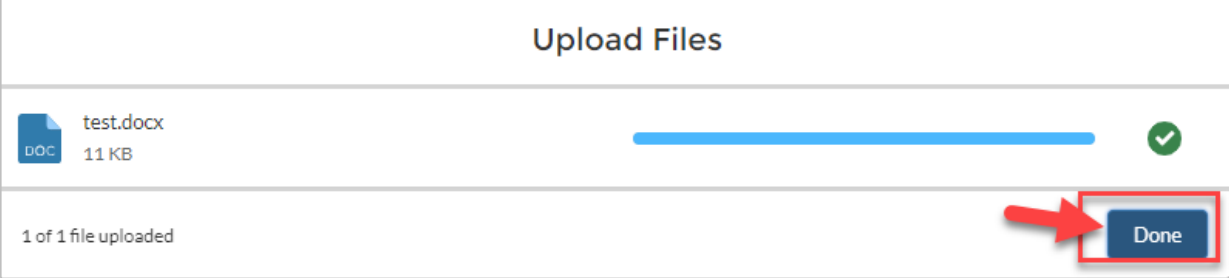
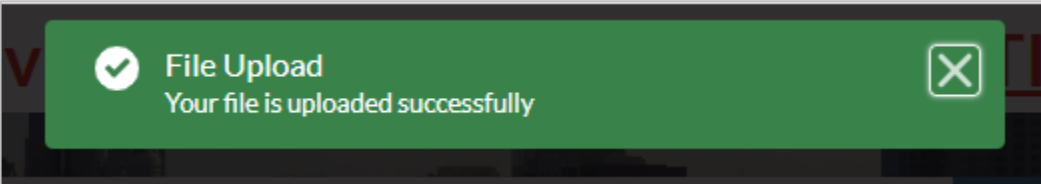

If **'No'** was selected then skip to step 8

* Do you have a subcontractor agreement to upload?

Yes

No


CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

<p>5. Upload the Subcontractor Contract in the next popup</p>	
<p>6. The Upload Files popup will appear and a green checkmark will appear when the upload is complete</p> <p>Click the Done button to exit the screen</p>	
<p>7. A successful message will appear at the top of the screen</p>	
<p>8. Select the Submit button to close out of the form</p>	

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

9. The newly added training subcontractor will now be shown

Training Subcontractor(s) Changes

 Training Subcontractor(s) + ADD TRAINING SUBCONTRACTOR


Subcontractor Name	City	State	Cost of Service
test test	Sacramento	CA	\$50.00

* Subcontractor Changes Justification

10. Input the justification for the change in the text box

Note: Text box has a 5000 character limit

Training Subcontractor(s) Changes

 Training Subcontractor(s) + ADD TRAINING SUBCONTRACTOR

Subcontractor Name	City	State	Cost of Service
test test	Sacramento	CA	\$50.00

* Subcontractor Changes Justification

11. [Return to step 6 to continue](#)

*Note: **Click** on the link to be directed to the section*

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

REVISE PHYSICAL/ MAILING ADDRESS

1. Select the checkbox to indicate which change is being requested

Note: The current physical address and mailing address will appear for reference

▼ ADDRESS CHANGE

Update Physical Address

Current Physical Address:

Update Mailing Address

Current Mailing Address:

2. Complete all of the required fields prompted

▼ ADDRESS CHANGE

Update Physical Address

Current Physical Address:

* Physical Street Update

* Physical City Update

* Physical State Update

--None--

* Physical Zip/Postal Code Update

Update Mailing Address

Current Mailing Address:

* Mailing Street Update

* Mailing City Update

* Mailing State Update

--None--

* Mailing Zip/Postal Code Update

3. Provide a justification for the change

Note: Text box has a 5000 character limit

* Address Changes Justification

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

4. Click the links for **STD 204 – Payee Data Record** and **STD 205 – Payee Data Record Supplement** to download the forms

*Note: The STD 204 and STD 205 are **required**. A missing agreement may cause a delay in the processing time*

With the change of physical/mailling address, a new STD 204/205 will need to be completed.

Download and complete the latest STD 204/205 forms:

[STD 204 - Payee Data Record](#)
[STD 205 - Payee Data Record Supplement](#)

Please upload your completed form(s). An incomplete or missing form may delay future payments and revision process.

5. Complete and upload the forms in the **Support Document(s)** section

With the change of physical/mailling address, a new STD 204/205 will need to be completed.

Download and complete the latest STD 204/205 forms:

[STD 204 - Payee Data Record](#)
[STD 205 - Payee Data Record Supplement](#)

Please upload your completed form(s). An incomplete or missing form may delay future payments and revision process.

∨ SUPPORT DOCUMENT(S)

Upload Supporting Documents

 **UPLOAD FILES** Or drop files

Last file uploaded:

None

6. [Return to step 6 to continue](#)

*Note: **Click** on the link to be directed to the section*

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

REVISE PRIMARY CONTACT INFORMATION

1. Select the checkbox to indicate which change is being requested

▼ PRIMARY CONTACT INFORMATION

- Replace Primary Contact
- Update Current Primary Contact's Title
- Update Current Primary Contact's Phone Number

2. Click on the links to direct you to the section for the appropriate steps

- [Replace Primary Contact](#)
- Update Current Primary Contact's Title or Phone Number

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

REPLACE PRIMARY CONTACT

1. Select the checkbox to **Replace Primary Contact**

▼ **Primary Contact Information**

Replace Primary Contact

Update Current Primary Contact's Title

Update Current Primary Contact's Phone Number

2. From the picklist of available users select the New Primary Contact and proceed to Step 4.

If the new primary contact is not listed, select the option **Primary Contact is not listed** and proceed to Step 3.

Note: The current primary contact name, title, email, and phone will be shown for reference

Current Primary Contact Name:
alayna@cal-e-force.com

Current Primary Contact Title:
Tester

Current Primary Contact Email:
alayna@cal-e-force.com

Current Primary Contact Phone:
8001234567

* New Primary Contact

Alayna NewContactTest

--None--

Alayna NewContactTest

Contact 1+

Contact 2+

test test

Primary Contact is not listed

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

3. For new primary contacts not listed, complete the required fields that appear

* New Primary Contact

Primary Contact is not listed

* First Name

* Last Name

* Title

* Email

you@example.com

* Phone Number

4. Provide a justification for the change request

Note: Text box has a 5000 character limit

* Primary Contact Changes Justification

5. [Return to step 5 to continue](#)

*Note: **Click** on the link to be directed to the section*

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

UPDATE CURRENT PRIMARY CONTACT'S TITLE OR PHONE NUMBER

1. Select the checkbox to either update the title or phone number of the current primary contact

▼ Primary Contact Information

Replace Primary Contact

Update Current Primary Contact's Title

Update Current Primary Contact's Phone Number

2. Complete all of the required fields prompted

*Note: The **current primary contact phone number** and the **current primary contact title** will be shown for reference*

▼ PRIMARY CONTACT INFORMATION

Update Primary Contact Phone Number

Current Primary Contact Phone Number:

* Phone

Update Primary Contact Title

Current Primary Contact Title:

* Title Update

3. Provide a justification for the change request

Note: Text box has a 5000 character limit

* Primary Contact Changes Justification

4. [Return to step 6 to continue](#)

*Note: **Click** on the link to be directed to the section*

CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

OTHER

1. When **Other** is checked, a textbox will populate

Provide details of request in the text box

Note: Text box has a 5000 character limit

Request to Revise the Contract (check all that may apply)

Other

* Details of Request

NEXT

2. Then click **Next** to submit

Request to Revise the Contract (check all that may apply)

Other

* Details of Request

NEXT

3. [Return to step 6 to continue](#)

Note: Click on the link to be directed to the section