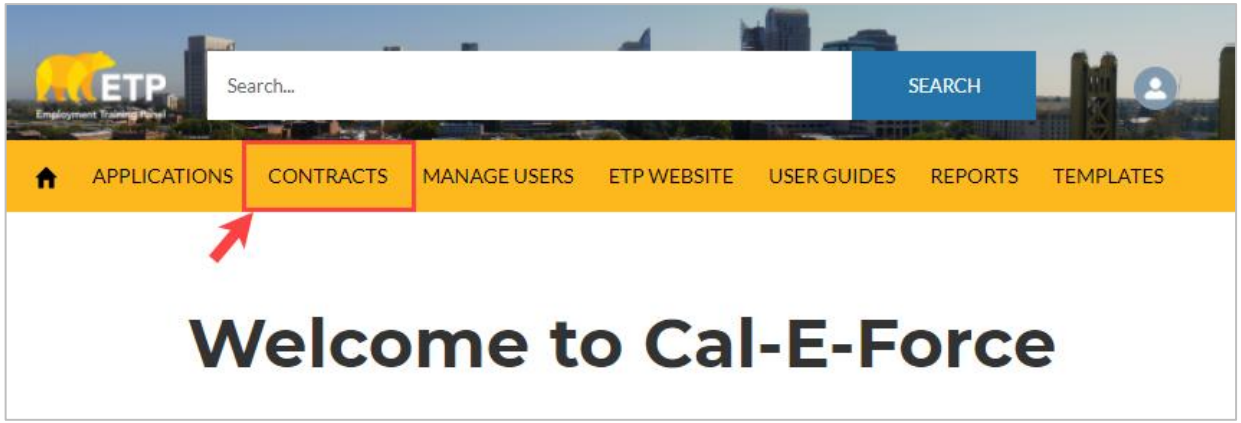
CAL-E-FORCE REFERENCE GUIDE: REVISION REQUEST

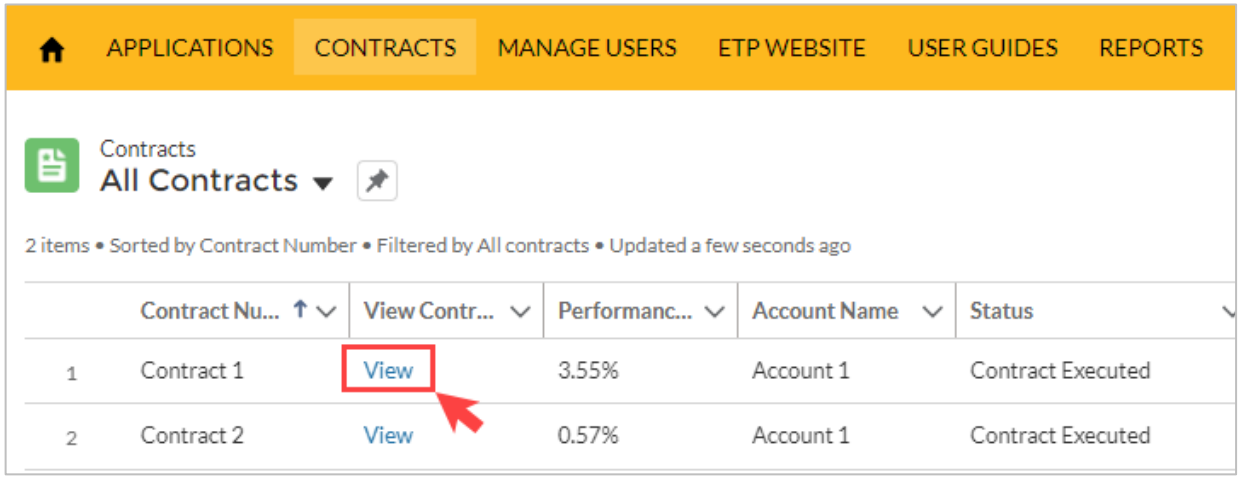
LOCATING AND COMPLETING THE REQUEST REVISION FORM

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

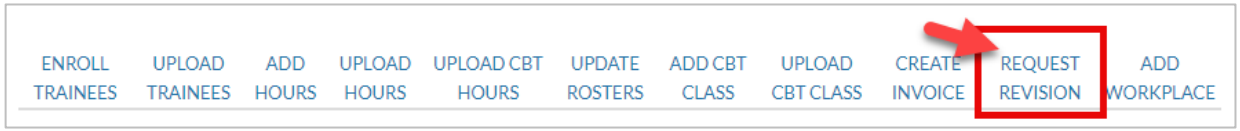


2. Click on the **View** hyperlink for the contract in which you would like to submit a revision request

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



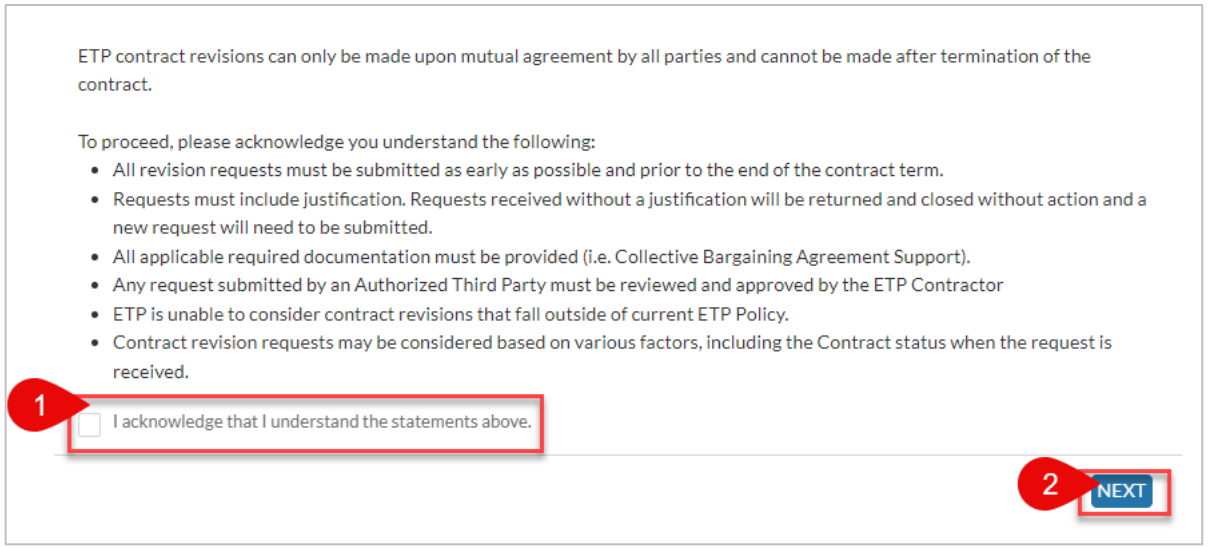
3. Select the **Request Revisions** button on the button bar at the top of the Contract Details Page
The Request Revision form will popup



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.

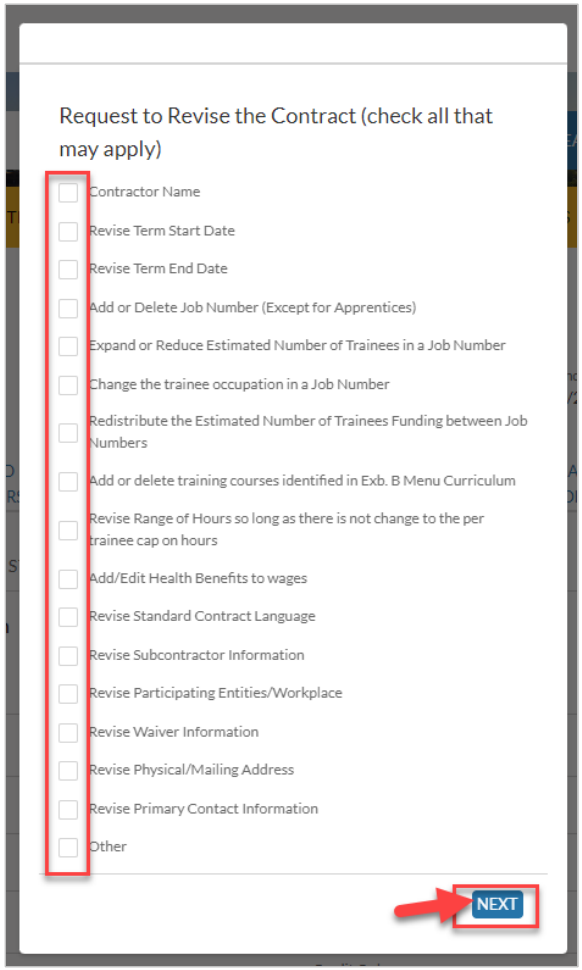


5. From the popup, select the checkbox(es) next to each request(s) that may apply

   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*



6. Complete all required fields as prompted from your selection

Note: Each request will prompt different requirement fields

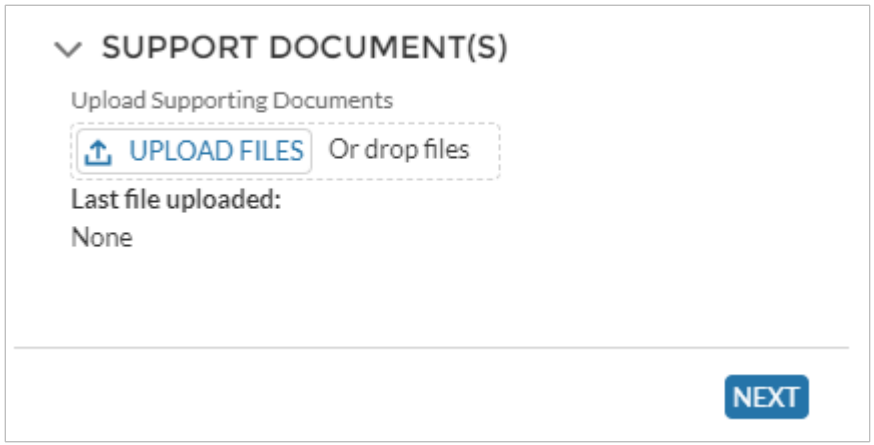
***Click** on the link to be directed to the section*

- 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)*

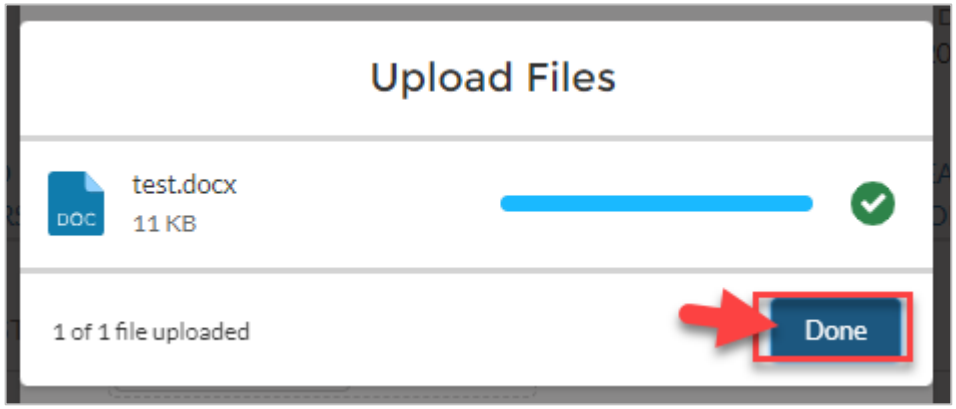
Should the required document be missing, there may be a delay in processing time



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

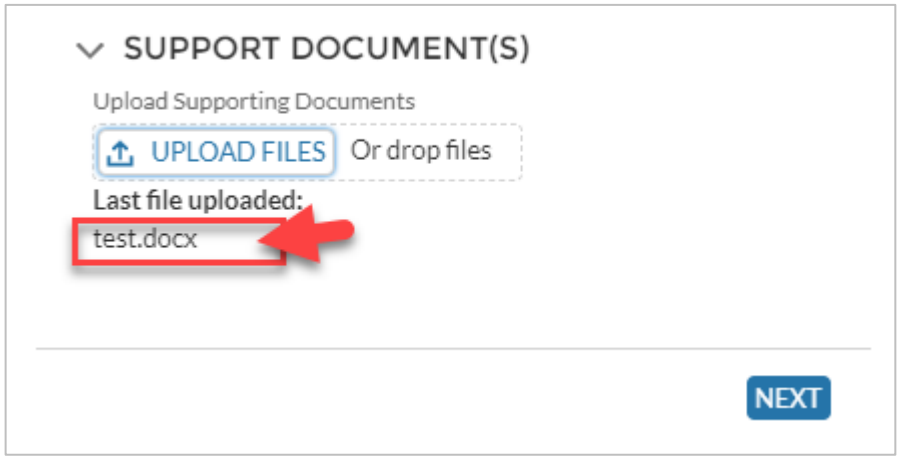
   A green checkbox will appear next to the document to show the completion of the upload

   Click **Done** to exit screen



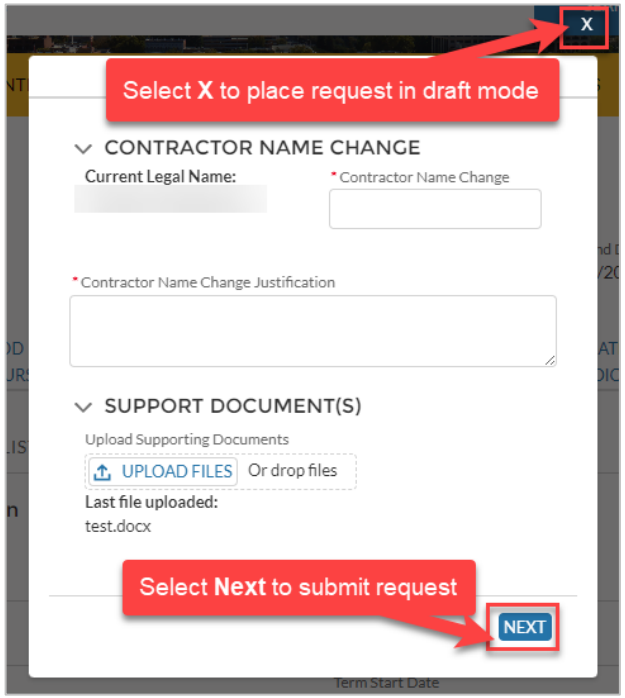
9. The file will be listed under **Last file uploaded**

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



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*



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

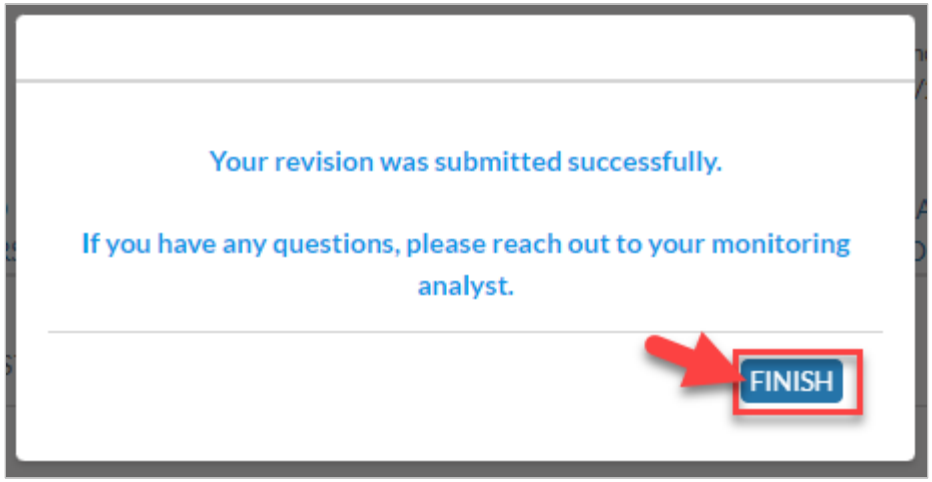
    Then click the **Next** button.

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

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

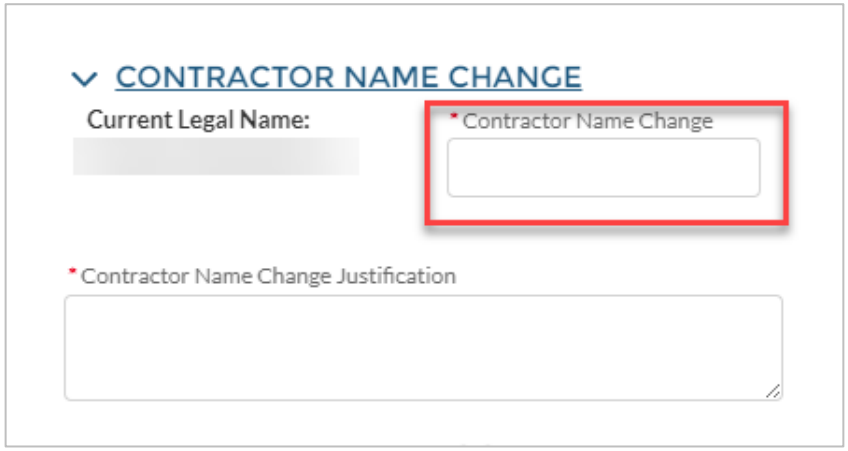


COMPLETING THE REQUIRED PROMPTED FIELDS

CONTRACTOR NAME CHANGE

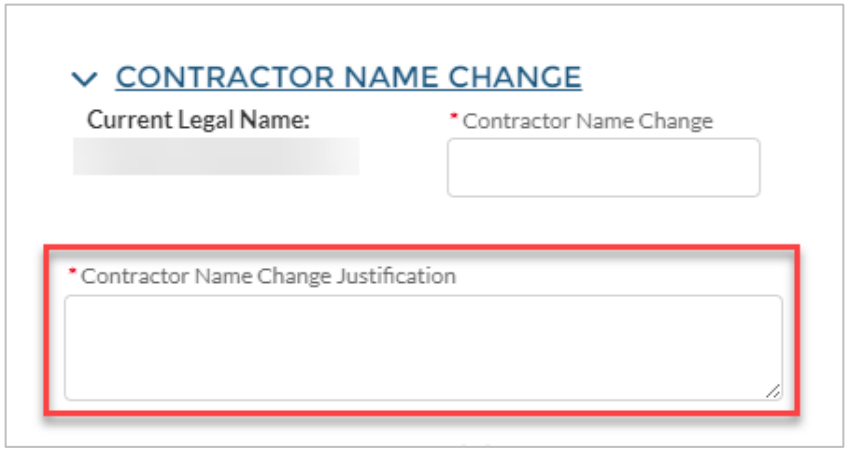
1. Input the name change for the contractor in the **Contractor Name Change** section

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



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

   Note: Text box has a 5000 character limit.



3. Return to step 5 to continue

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

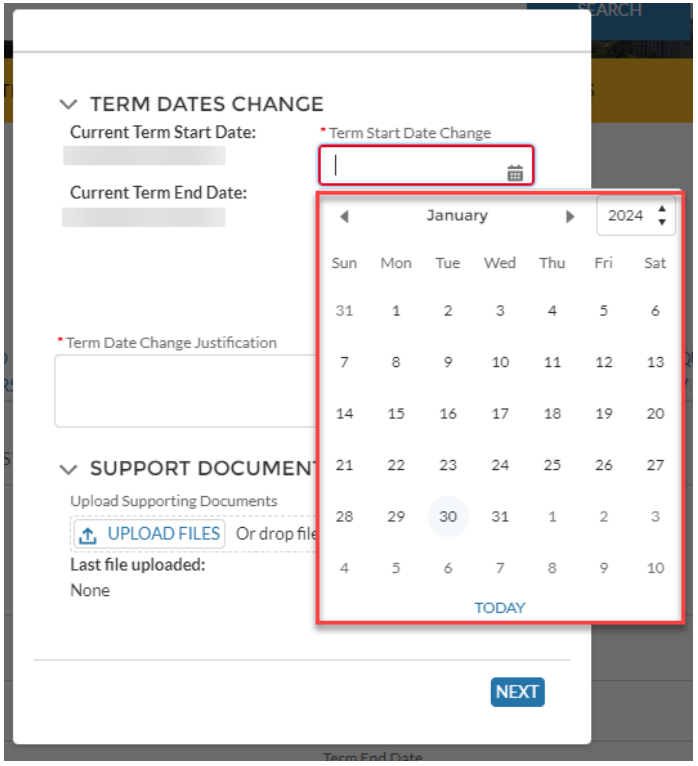
REVISE TERM DATES

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

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

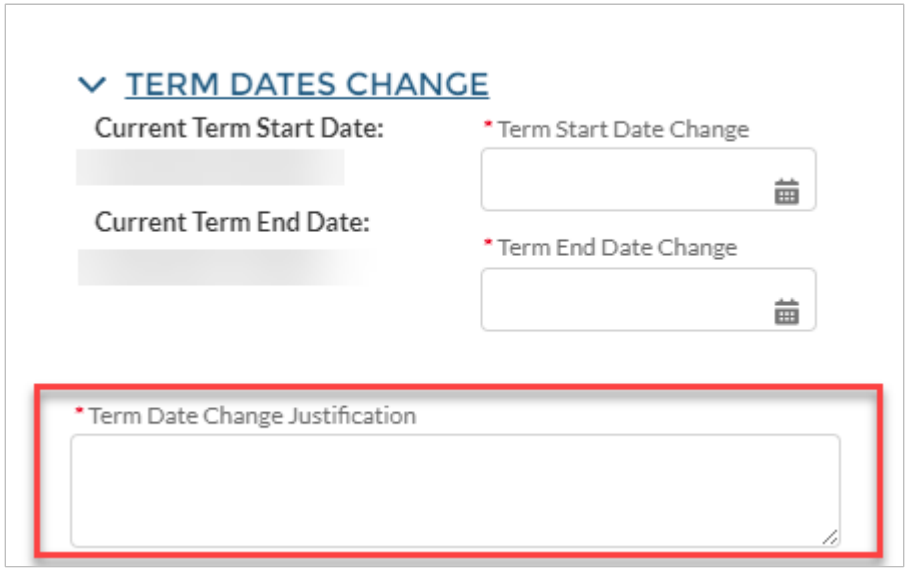
   If inputting, dates must be formatted as MMM D,YYYY (example: Jan 1,2024) or MM DD,YYYY (example: 01/01/2024)

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



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

   Note: Text box has a 5000 character limit

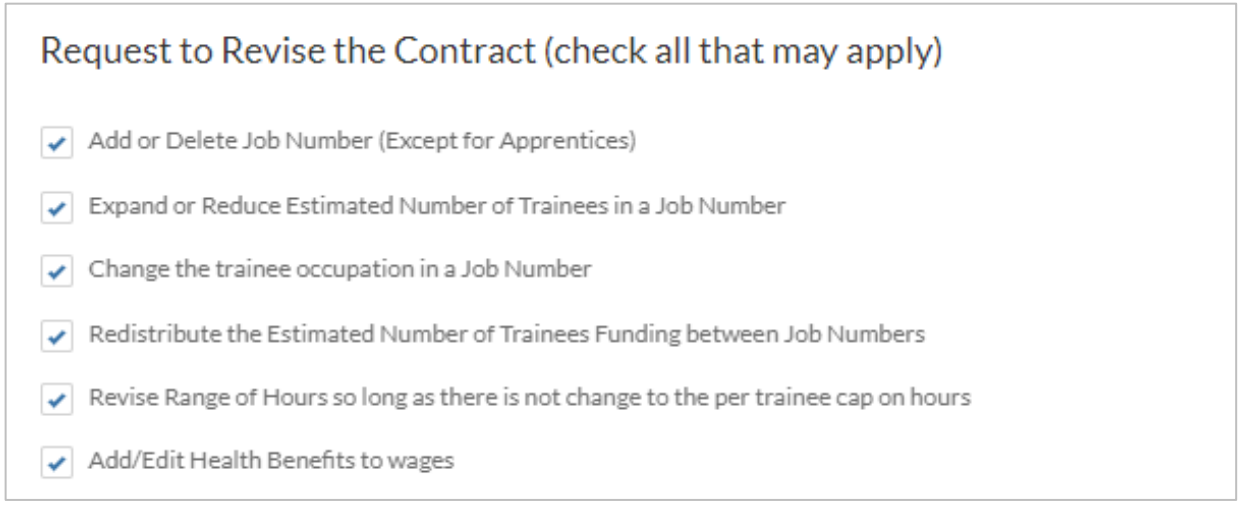


4. Return to step 5 to continue

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

JOB NUMBER CHANGES

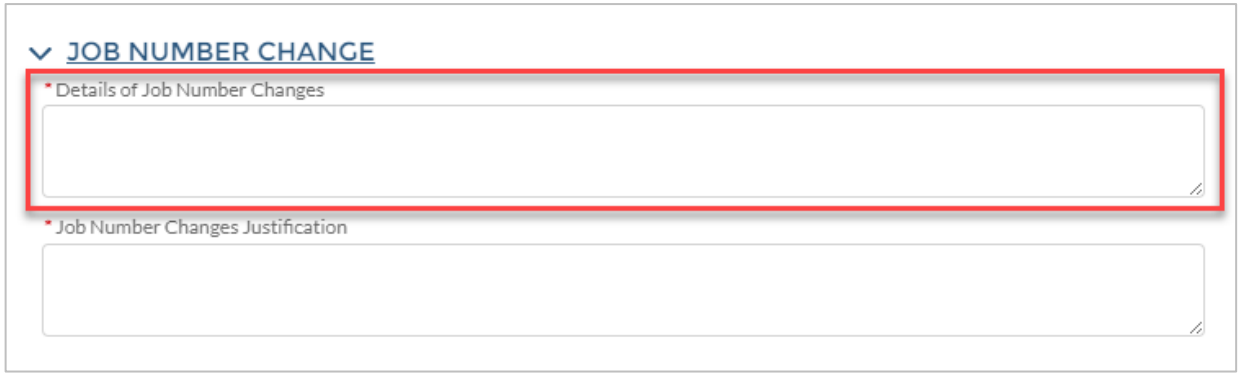
1. When one, multiple, or all of these revisions are selected, it will prompt a Job Number change



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



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

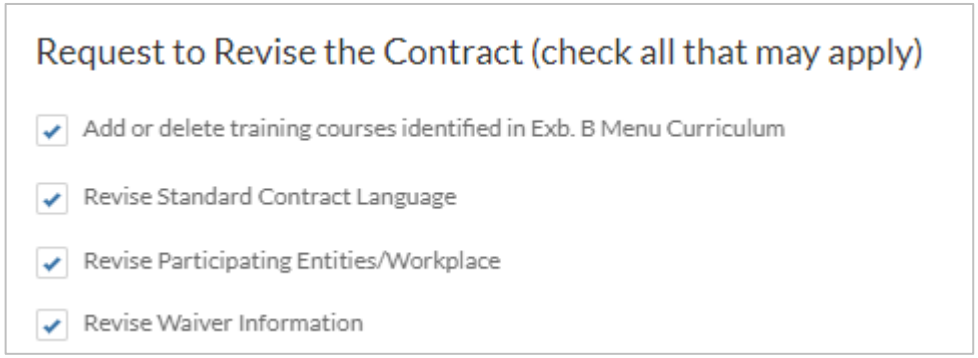
   Text box has a 5000 character limit

4. Return to step 5 to continue

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

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

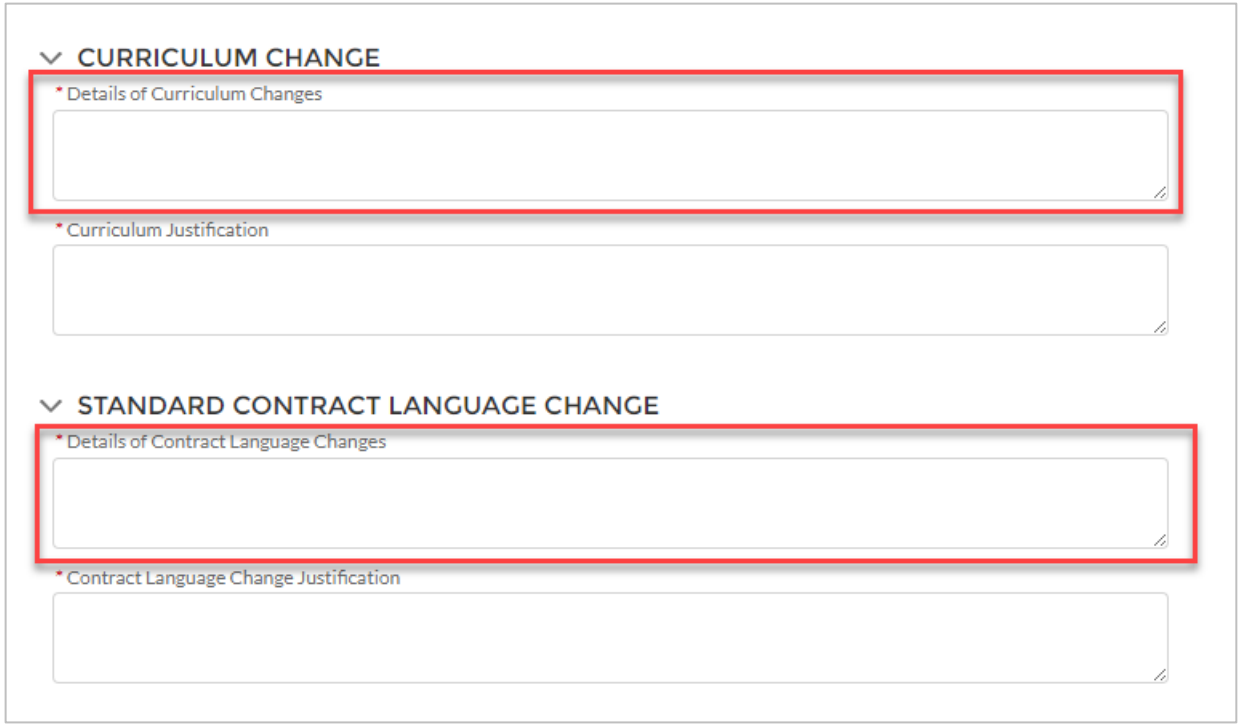
1. Select one or multiple of these revision request(s)



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

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

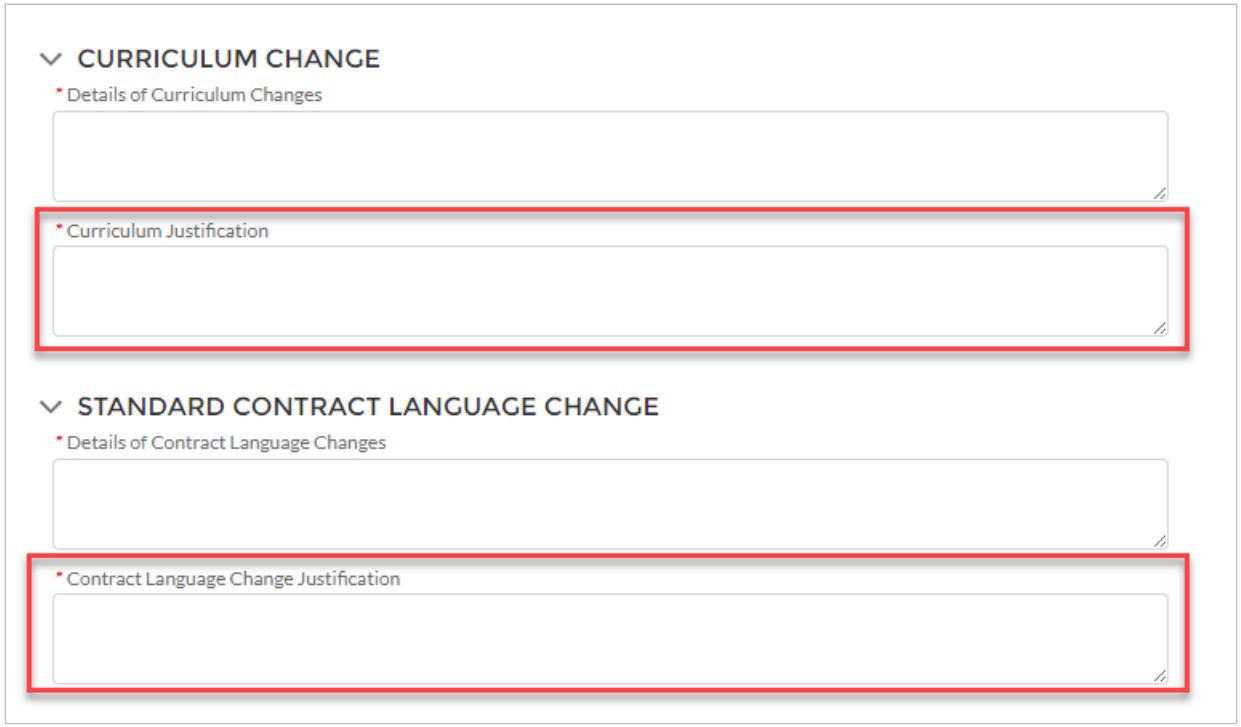
   Text box has a 5000 character limit



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

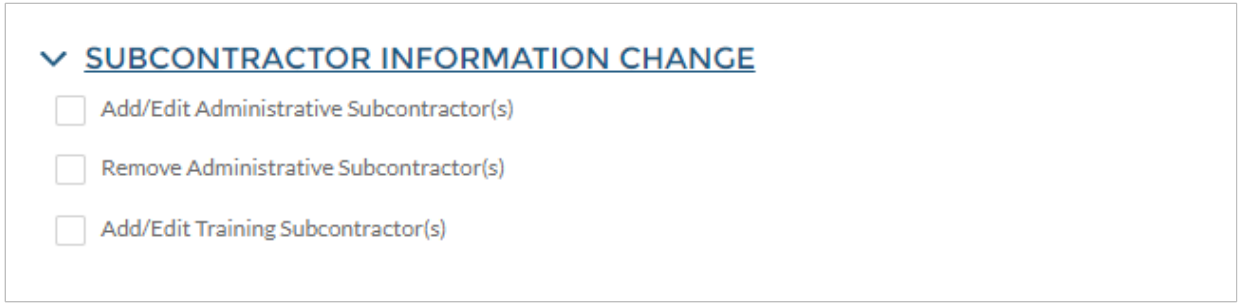
   Note: A separate text box will populate for each request

   Text box has a 5000 character limit



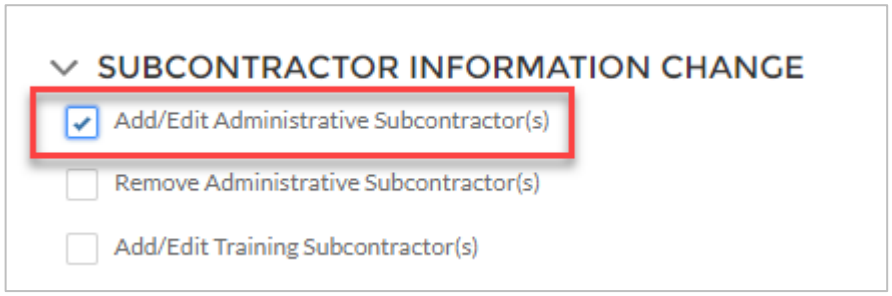
4. Return to step 5 to continue

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

REVISE SUBCONTRACTOR INFORMATION	
1. Select all that applies from the Subcontractor change list	
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)

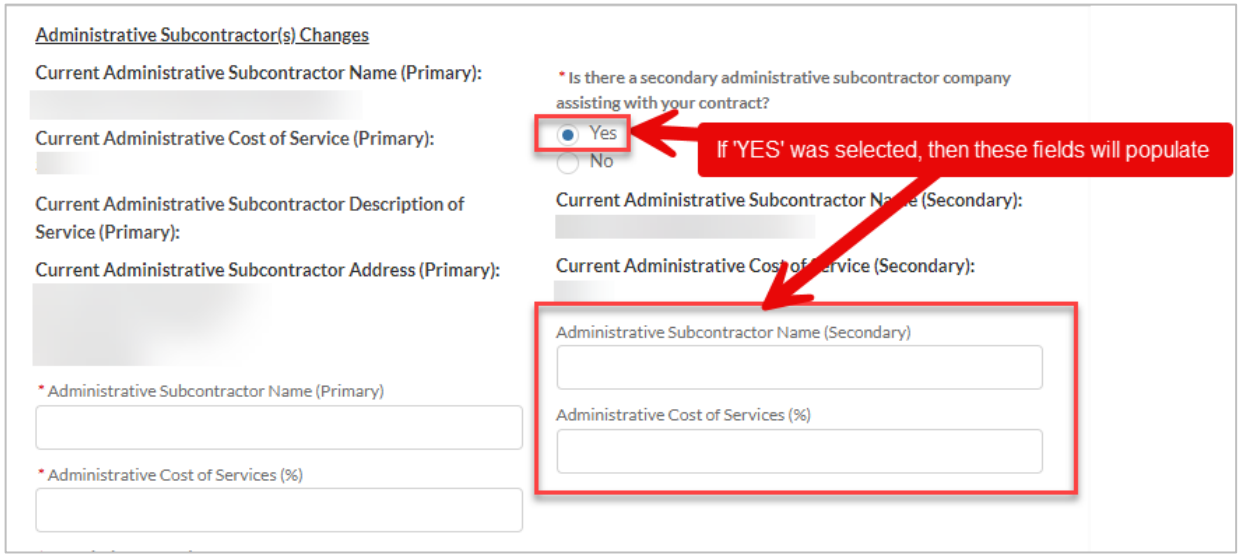
ADD/ EDIT ADMINISTRATIVE SUBCONTRACTOR(S)

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

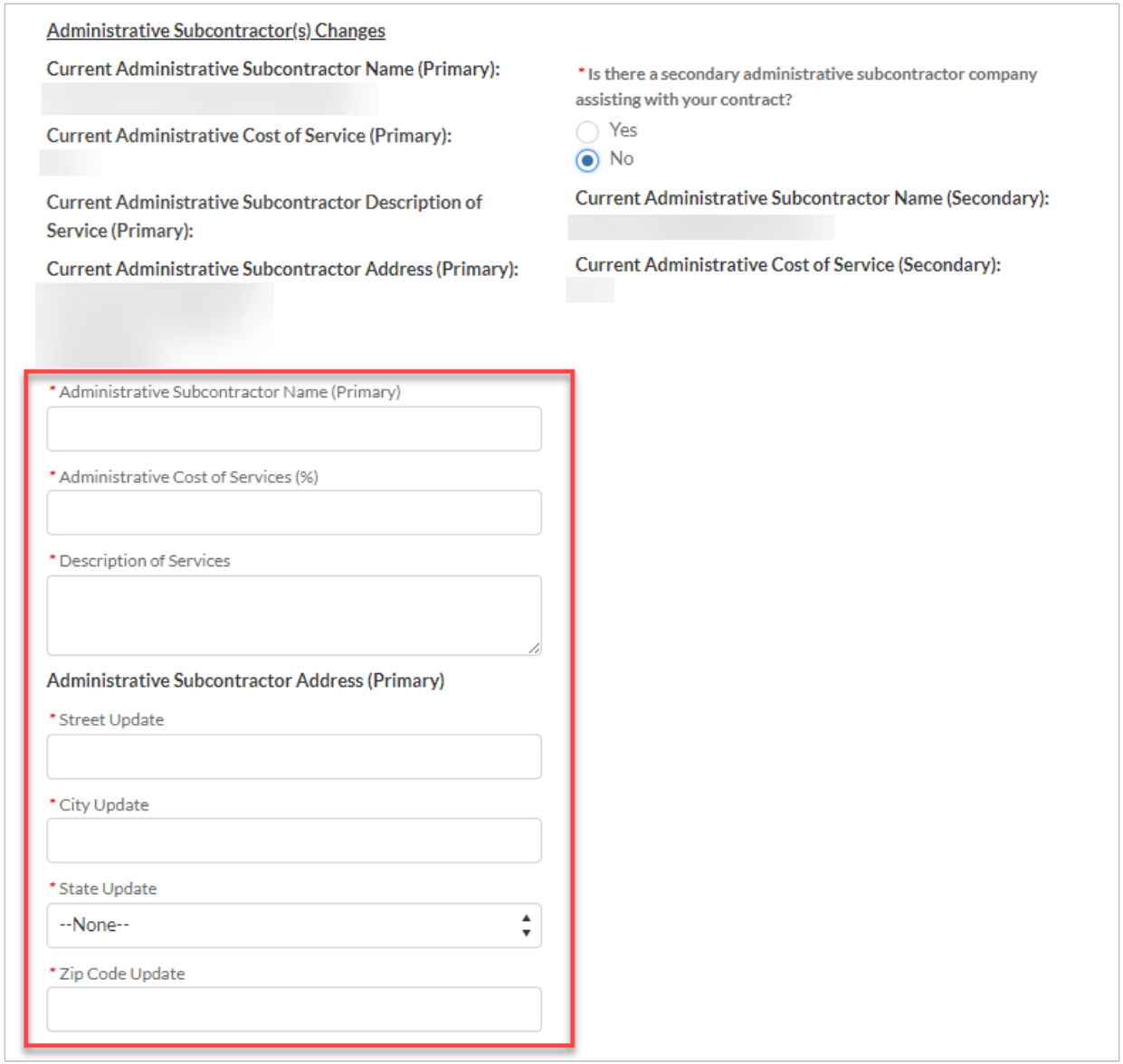


2. Choose either **Yes** or **No** in response to the question 'Is there a secondary administrative subcontractor company assisting with your contract?'

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

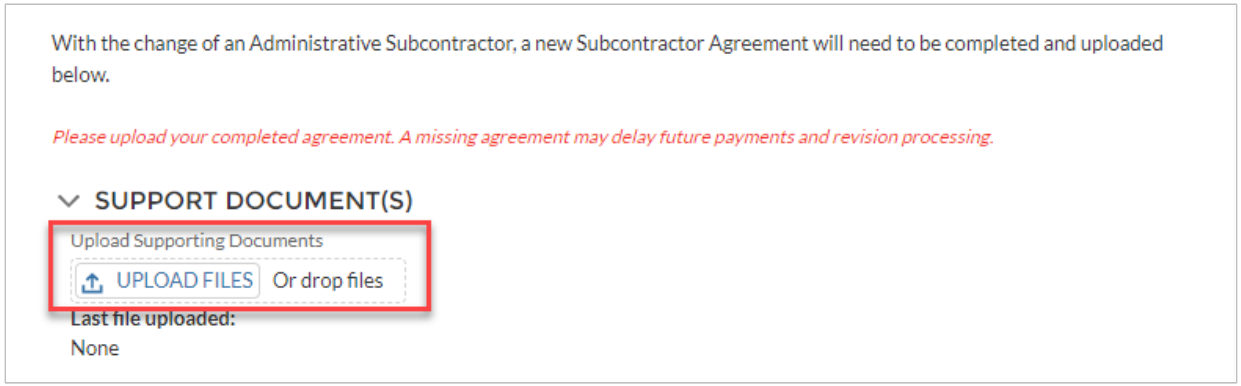


3. Complete all required fields



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*

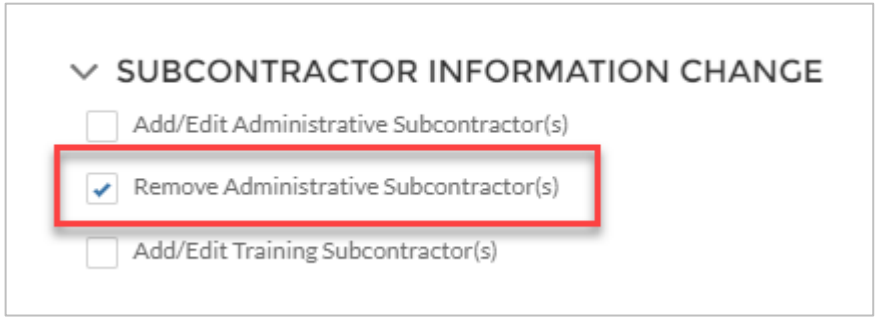


5. Return to step 5 to continue

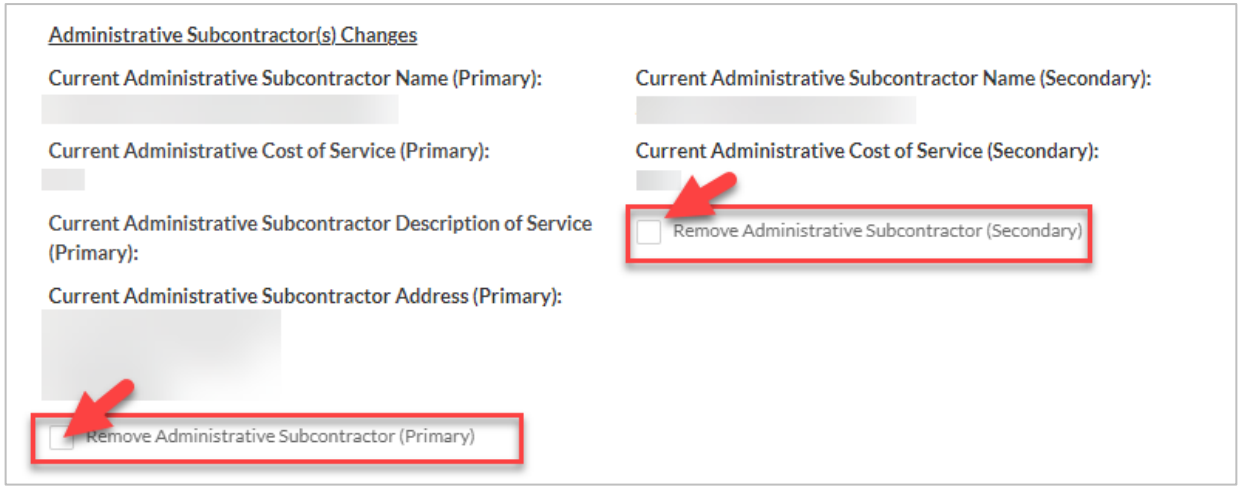
   *Note: **Click** on the link to be directed to the section*

REMOVE ADMINISTRATIVE SUBCONTRACTOR(S)

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



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

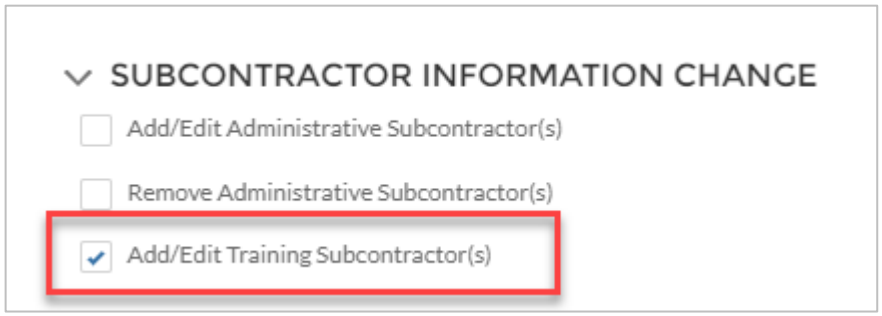


3. Return to step 5 to continue

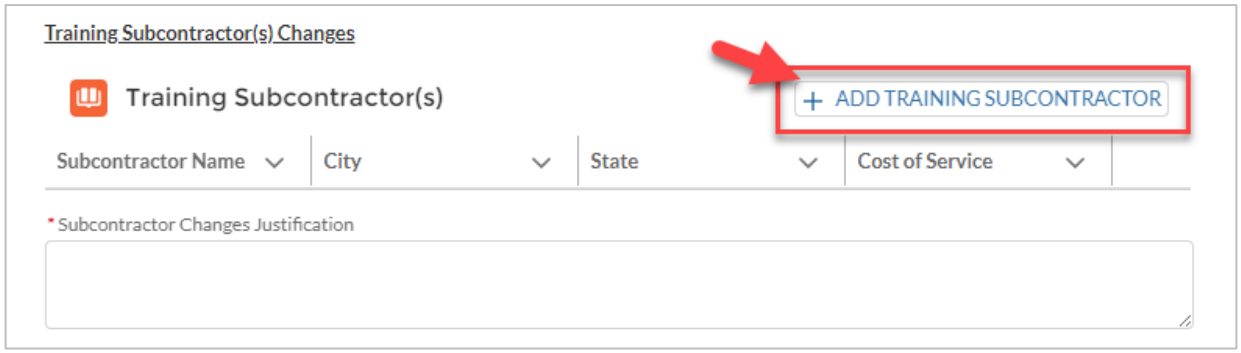
*Note: **Click** on the link to be directed to the section*

ADD/EDIT TRAINING SUBCONTRACTOR(S)

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



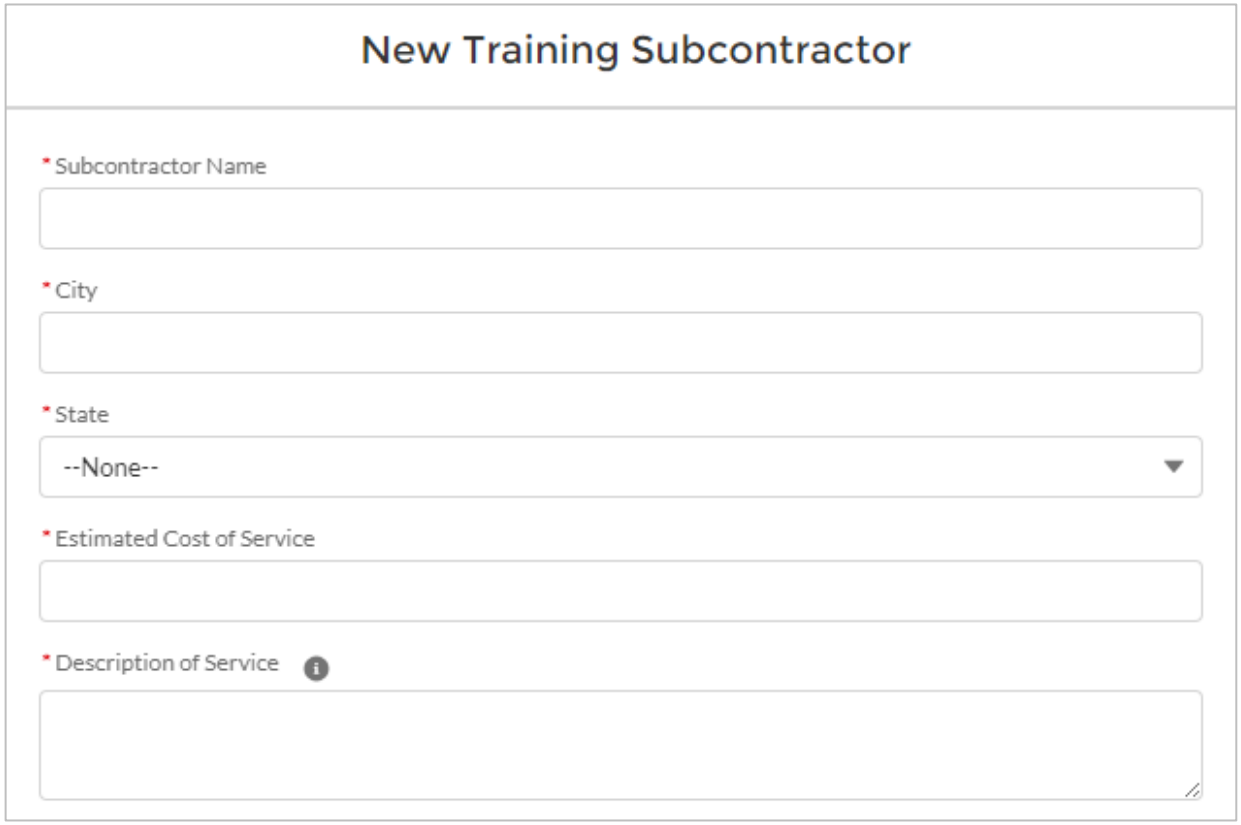
2. To add, click the **Add Training Subcontractor** button



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

   Complete all required fields that are prompt

   Select the **Submit** button

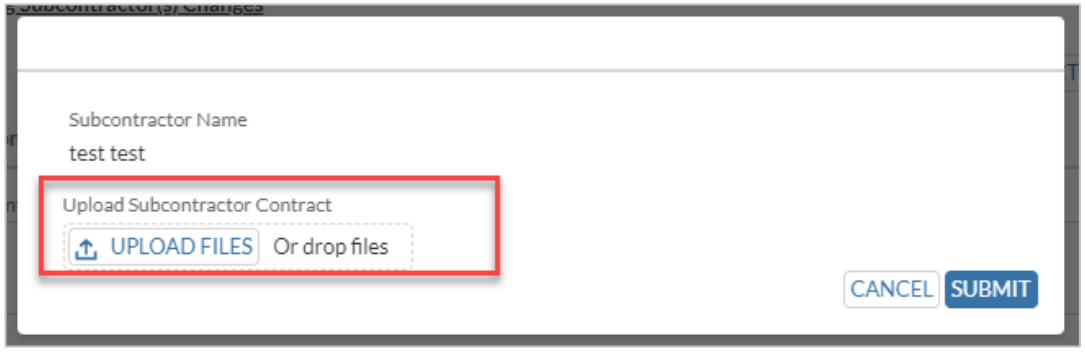


4. Confirm if a subcontractor agreement will be uploaded

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

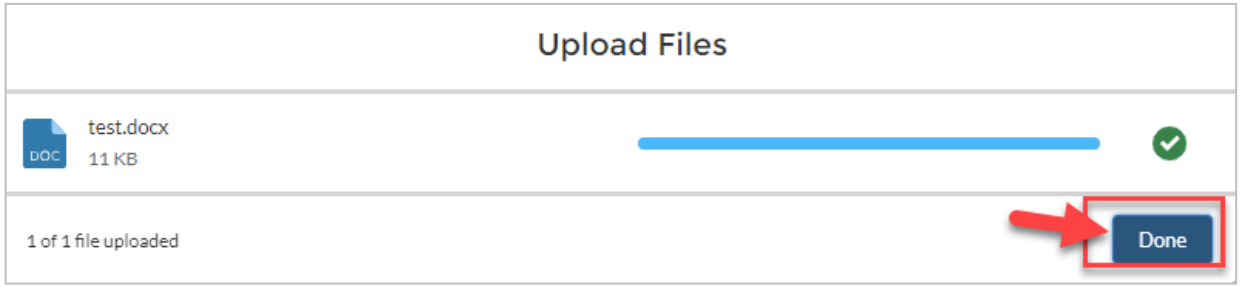
   If '**No'** was selected then skip to step 8

5. Upload the **Subcontractor Contract** in the next popup

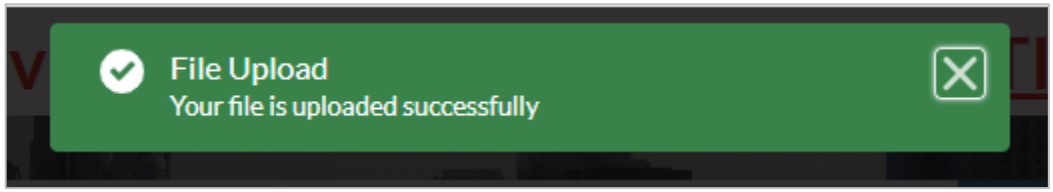


6. The Upload Files popup will appear and a green checkmark will appear when the upload is complete

   Click the Done button to exit the screen

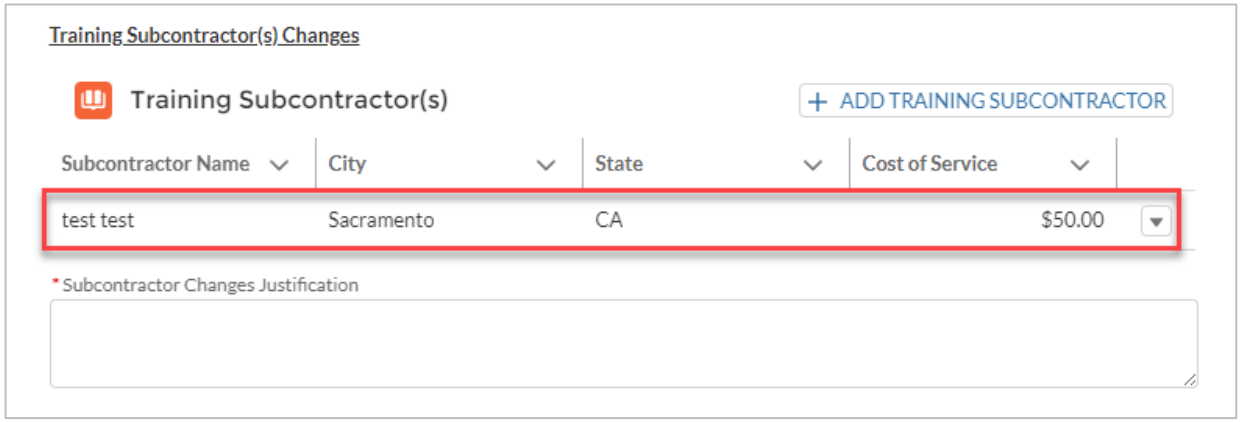


7. A successful message will appear at the top of the screen



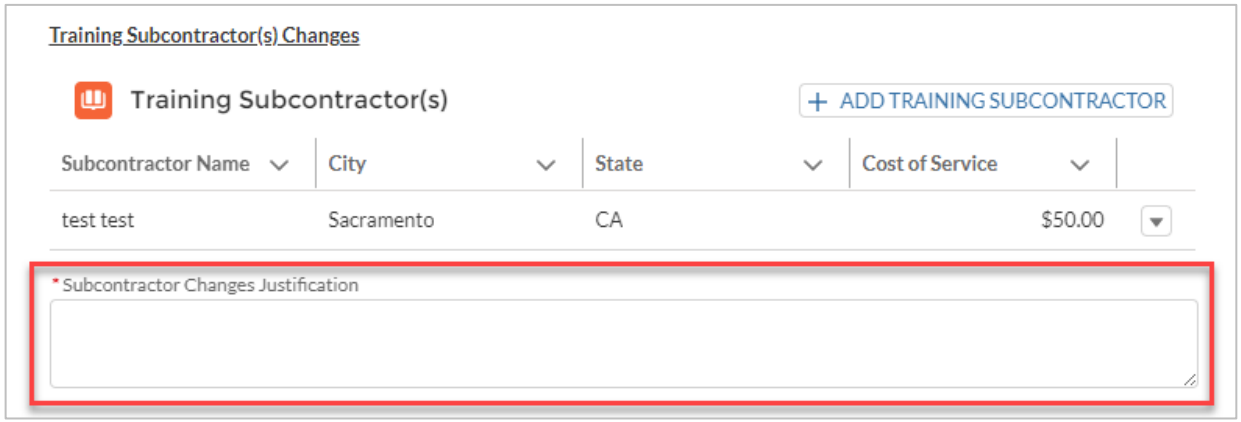
8. Select the **Submit** button to close out of the form

9. The newly added training subcontractor will now be shown



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

Note: Text box has a 5000 character limit



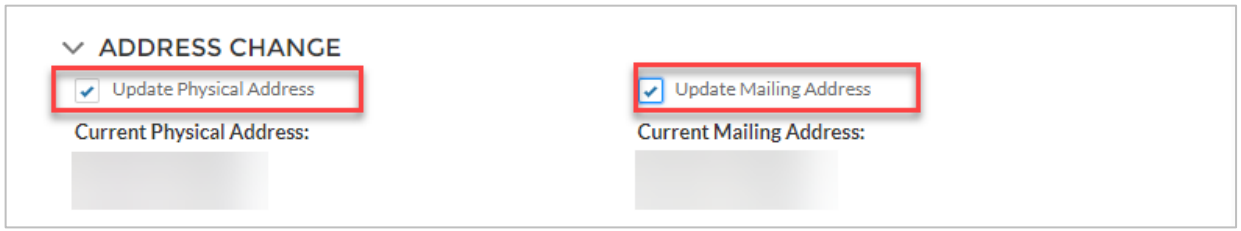
11. Return to step 5 to continue

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

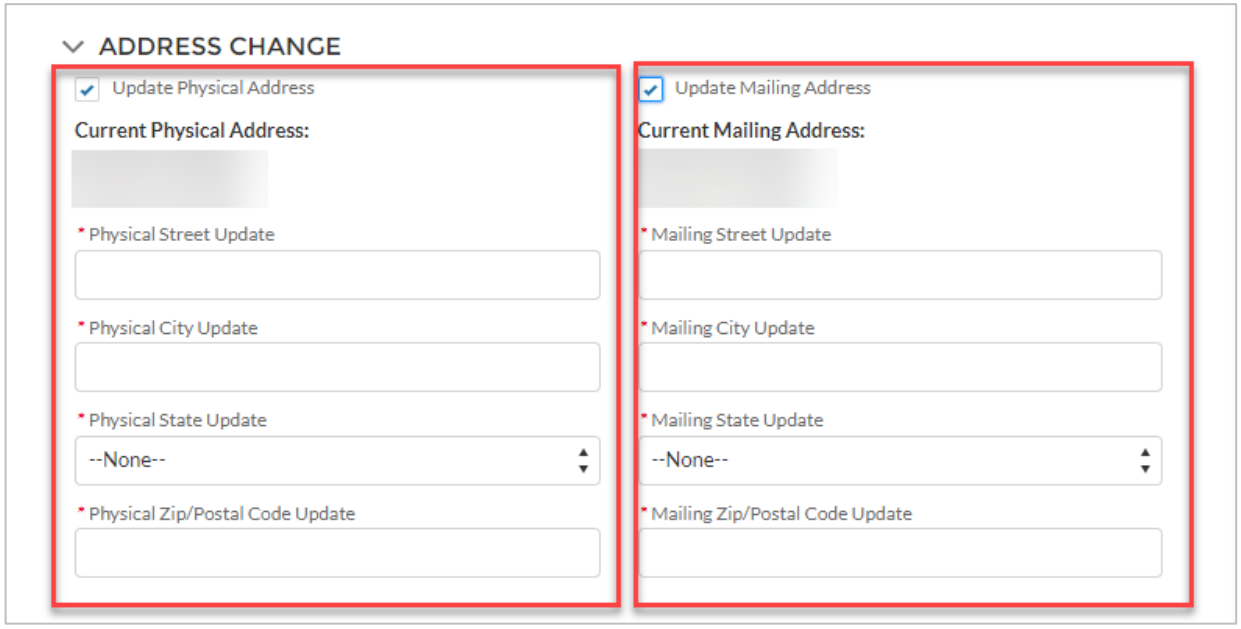
REVISE PHYSICAL/ MAILING ADDRESS

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

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



2. Complete all of the required fields prompted

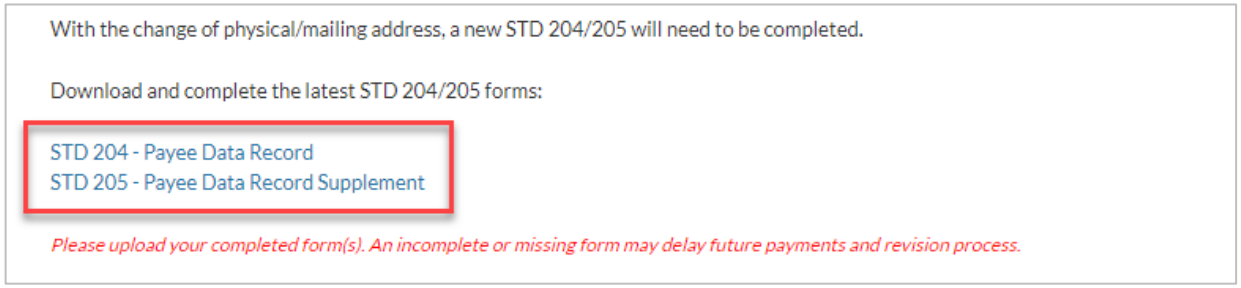


3. Provide a justification for the change

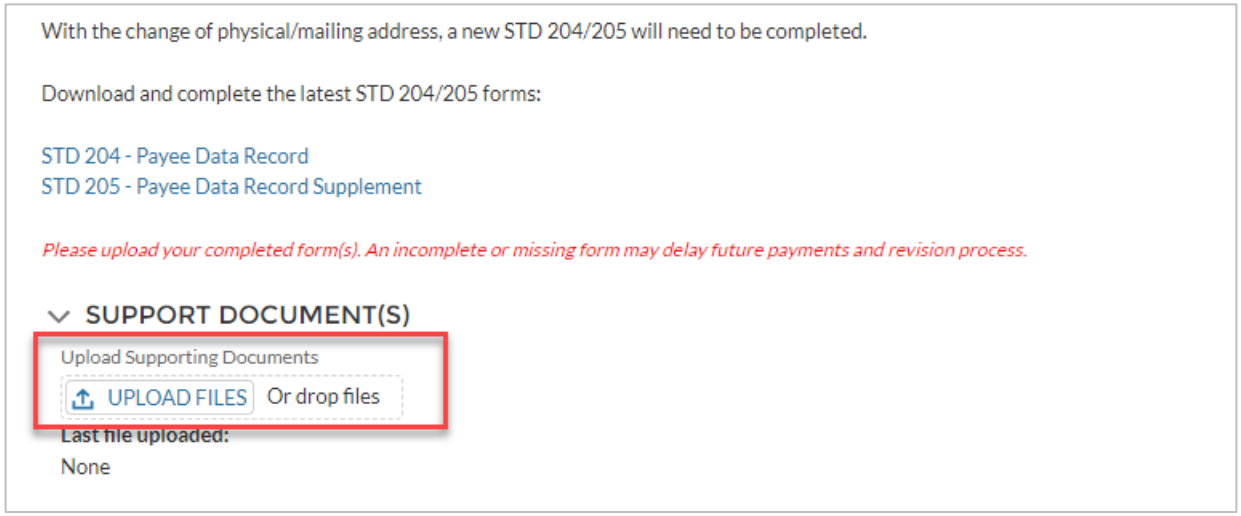
   Note: Text box has a 5000 character limit

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*



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

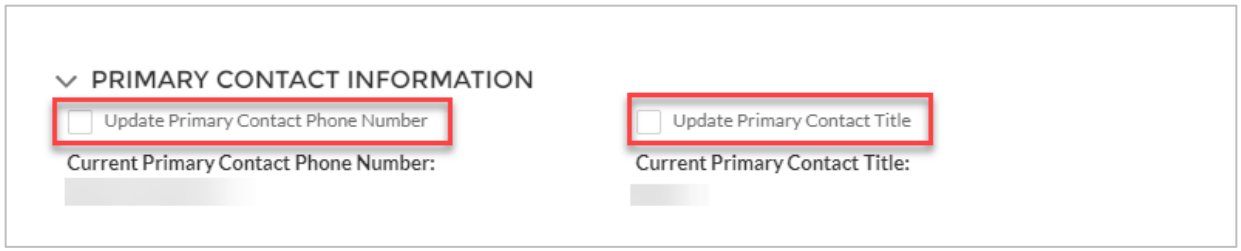


6. Return to step 5 to continue

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

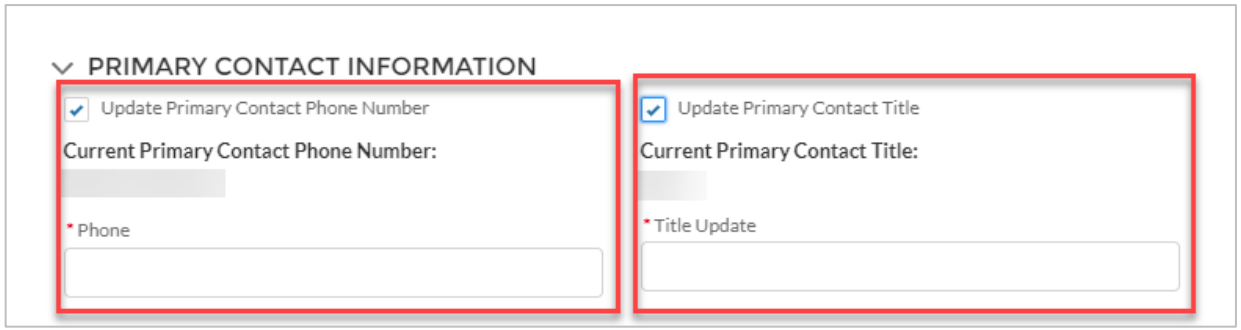
REVISE PRIMARY CONTACT INFORMATION

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



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*



3. Provide a justification for the change request

   Note: Text box has a 5000 character limit

4. Return to step 5 to continue

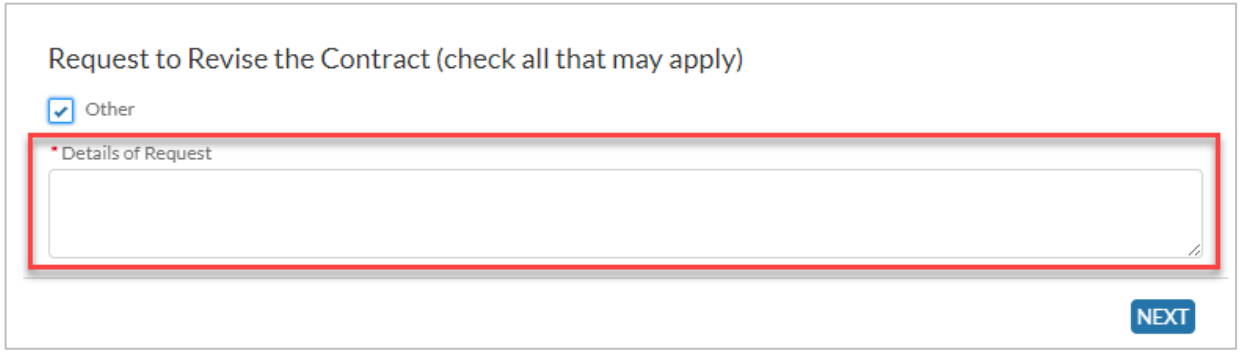
   *Note: **Click** on the link to be directed to the section*

OTHER

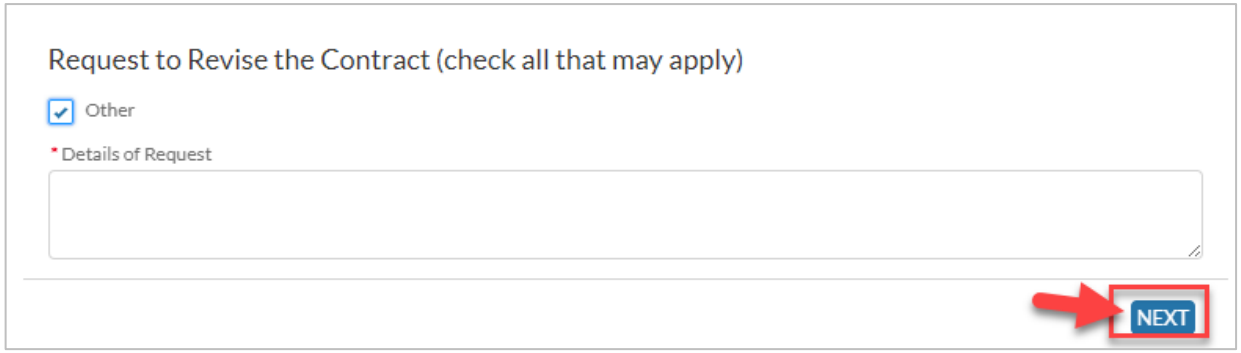
1. When **Other** is checked, a textbox will populate

   Provide details of request in the text box

   Note: Text box has a 5000 character limit



2. Then click **Next** to submit



3. Return to step 5 to continue

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