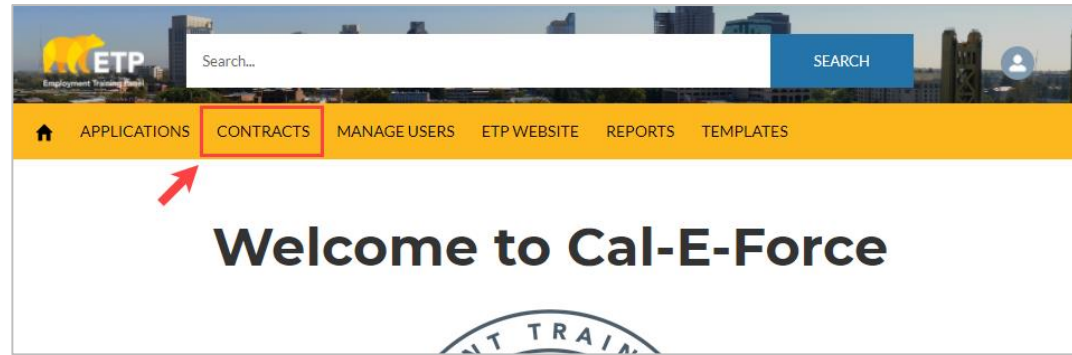# CAL-E-FORCE REFERENCE GUIDE: UPLOAD TRAINEES

Contractors are required to **Add a Workplace** prior to enrolling trainees. Reference material for Adding a Workplace can be located on the Cal-E-Force general information page

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 you would like to upload trainees. The system will take you to that contract's detail page	
3. Select the **Upload Trainees** button on the button bar, which is located at the top of the Contract Details page	

4. This will take you to the upload page. Select both **Click Here** hyperlinks to download the Template and the Upload Codes

Upload Trainees

Please Upload your CSV file here: [Choose File] No file chosen   [Upload]   [Back]

Note: Please use the standard template to upload Trainees data. Click Here to download the template
Click Here to download the Upload Codes.

5. On the **Upload Codes** document, the instructions on how to fill out the template are located at the top of the template page. Cal-E-Force also provides the associated codes needed to fill out the template in the remaining tables

   For example, for the Age Group column, if I was enrolled a trainee who was 30 years old I would enter "2" in that template column

   * Note: The **Location Number** can be found on the **Entities and Locations** list view on the Contract Detail Page

SSN	Employee ID	Trainee First Name	Trainee Last Name	Job Number	Workplac
Enter the SSN of the Trainee. Format: ###-##-#### or ######### Note: Please change the cell/column format to 'TEXT' in Excel if you are entering SSNs *without* dashes. This will prevent any leading zeros from being dropped.	Enter the Employee ID for the Trainee. This will be used as the Unique Identifier for the trainee in the system. A system-generated ID will be provided if an employee id is not provided Format: Can contain both numbers and letters Note: If Employee IDs begin with leading zeros, please	Enter the First Name of the Trainee Format: Text	Enter the Last Name of the Trainee Format: Text	Enter the Job Number of the trainee. Format: Whole numbers only EX: If Job Number is 1, then enter 1.	Enter the w trainee. Format: Wh only. EX: If Locati 1, then ente

Gender	Code		Age Group	Code		Veteran	Code		Disabled	Code
Male	M		Less Than 25	1		Yes	Y		Yes	Y
Female	F		25 – 34	2		No	N		No	N
Non-binary	N		35 – 44	3		Unknown	U		Unknown	U
			45 – 54	4						
			55 – 64	5						
			65 & Older	6						

Ethnicity	Code		Education	Code		Orientation	Code		Identity	Code
White	1		Eighth Grade or less	1		Decline to State	0		Decline to State	0
Black	2		High School Grad	2		Lesbian	1		Female	1
Hispanic	3		GED	3		Gay	2		Male	2
Native American	4		Some College	4		Bisexual	3		Trans Male/Trans Man	3
Asian	5		College Grad	5		Queer	4		Trans Female/Trans W	4
Pacific Islander	6		Post College Grad	6		Heterosexual/Straight	5		Genderqueer/Gender	5
Filipino	7		Some High School	7		Pansexual	6		Non-Binary	6
Other	8					Asexual	7		Not Sure	7
						Questioning	8		Another Identity	8
						Not Sure	9			
						Another Orientation	10			

Sex at Birth	Code
Male	M
Female	F

6. The fields required on the standard template are outline in red here. Those that are not may be left blank (Employee ID, Preferred Name, Orientation, Identity, and Sex at Birth).

   *If enrolling trainees into a New Hire job number, the **Hire Date** & **Wage at Enrollment** fields may be left blank*
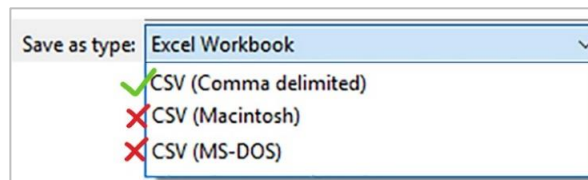
   Wage at Enrollment is hourly wages

   The Employee ID is used as the Unique ID for the trainee (Do not use any special characters or spaces). This will be a required field in all other upload processes. If an employee id is not given at time of enrollment, the system will provide one for the trainee

   The last 4 optional data fields are collected, but not required, per State of California regulations

   Hire Date: May be left blank if enrolling trainees into *New Hire* Job Number

SSN	Employee ID	Trainee First Name	Trainee Last Name	Job Number	Workplace	Hire Date	Wage at Enrollment ($)	Gender

Age	Veteran	Disabled Veteran	Ethnicity	Education	Preferred Name	Orientatic	Identity	Sex at Birth

7. If using a PC, save the file as a **CSV (Comma delimited) file**. If using a Mac, save as **Comma Separated Values (.csv)**

   PC USERS:

   Save as type: Excel Workbook

   ✓ CSV (Comma delimited)
   ✗ CSV (Macintosh)
   ✗ CSV (MS-DOS)

   MAC USERS:

   File Format ✓ Excel Workbook (.xlsx)

   ✗ CSV UTF-8 (Comma delimited) (.csv)
   ✓ Comma Separated Values (.csv)
   ✗ Windows Comma Separated (.csv)
   ✗ MS-DOS Comma Separated (.csv)
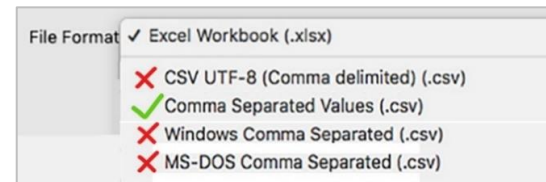
8. Once you have saved your file, select the **Choose File** button on the upload page to select the file you saved to your computer	**Upload Trainees** Please Upload your CSV file here: [Choose File] No file chosen [Upload] [Back] Note: Please use the standard template to upload Trainees data. Click Here to download the template Click Here to download the Upload Codes.
9. Click the **Upload** button.	**Upload Trainees** Please Upload your CSV file here: [Choose File] No file chosen [Upload] [Back] Note: Please use the standard template to upload Trainees data. Click Here to download the template Click Here to download the Upload Codes.
10. The system will provide you with a summary of the upload file *This summary will only display the first 50 rows from the file selected*	For your reference here is a sample list of Trainee Records that are being uploaded | SSN	EMPLOYEE ID	TRAINEE FIRST NAME	TRAINEE LAST NAME	JOB NUMBER	WORKPLACE CEAN	WORKPLACE	HIRE DATE	WAGE AT
---	---	---	---	---	---	---	---	---
***-**-7777	TID-1844	alayna	mollick	Retrainee	123-1232	Office	1/1/2000	
***-**-7776	TID-1845	amina	nasufovic	Retrainee	123-1232	Office	1/1/2000	
***-**-7775	TID-1846	geri	giron	Retrainee	123-1232	Office	1/1/2000	
***-**-7774	TID-1847	madison	hummel	Retrainee	123-1232	Office	1/1/2000	
***-**-7773	TID-1848	jenny	phang	Retrainee	123-1232	Office	1/1/2000		 When you are satisfied with the records above, click the Upload Trainees button to upload the trainee records. [Upload Trainees]

11. Click the **Upload Trainees** button to submit your upload

For your reference here is a sample list of Trainee Records that are being uploaded

SSN	EMPLOYEE ID	TRAINEE FIRST NAME	TRAINEE LAST NAME	JOB NUMBER	WORKPLACE CEAN	WORKPLACE	HIRE DATE	WAGE AT
***-**-7777	TID-1844	alayna	mollick	Retrainee	123-1232	Office	1/1/2000	
***-**-7776	TID-1845	amina	nasufovic	Retrainee	123-1232	Office	1/1/2000	
***-**-7775	TID-1846	geri	giron	Retrainee	123-1232	Office	1/1/2000	
***-**-7774	TID-1847	madison	hummel	Retrainee	123-1232	Office	1/1/2000	
***-**-7773	TID-1848	jenny	phang	Retrainee	123-1232	Office	1/1/2000	

When you are satisfied with the records above, click the Upload Trainees button to upload the trainee records.

Upload Trainees

12. You will receive a confirmation message stating your upload is in progress. You can navigate away from the page at any time. The file will process the upload in the background while you continue to work.

The processing time is dependent on the file size.

Your upload is processing. *You may navigate away from this page at any time.* You will receive an email when the upload is finished, including a link to any errors.
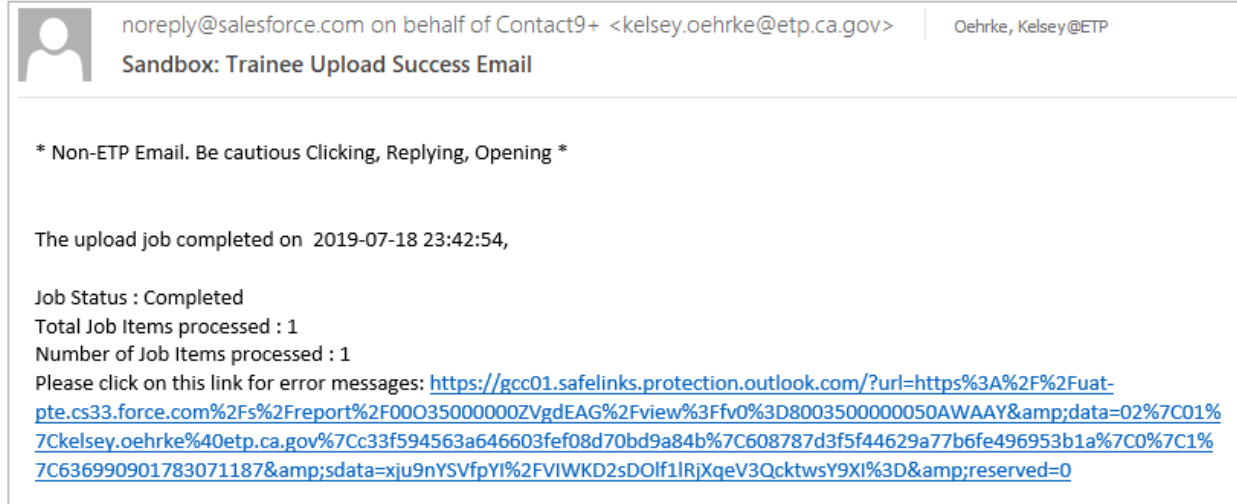
Ok

13. You will receive an email when the upload is complete. If there are any errors there will be a link to a report that will present the errors from the upload

    This email will go to the user who submitted the upload

noreply@salesforce.com on behalf of Contact9+ <kelsey.oehrke@etp.ca.gov>   Oehrke, Kelsey@ETP

Sandbox: Trainee Upload Success Email

* Non-ETP Email. Be cautious Clicking, Replying, Opening *

The upload job completed on 2019-07-18 23:42:54,

Job Status : Completed
Total Job Items processed : 1
Number of Job Items processed : 1
Please click on this link for error messages: https://gcc01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fuat-pte.cs33.force.com%2Fs%2Freport%2F00O35000000ZVgdEAG%2Fview%3Ffv0%3D8003500000050AWAAY&data=02%7C01%7Ckelsey.oehrke%40etp.ca.gov%7Cc33f594563a646603fef08d70bd9a84b%7C608787d3f5f44629a77b6fe496953b1a%7C0%7C1%7C636990901783071187&sdata=xju9nYSVfpYI%2FVIWKD2sDOlf1lRjXqeV3QcktwsY9XI%3D&reserved=0

14. Click on the link to view the Trainees Upload Error Report

    This report shows upload errors for the present day automatically. To edit the date, click on the funnel icon to change the date criteria

Report: Contracts with Upload Transactions
Upload Trainees Error Report

🔍 Add Chart ▼ ↻ Export

Total Records
0

Filters →

Uploading Date/Time
Today (On Nov 19, 2021)

🔒Type
equals Trainees Upload

Contract Number
contains ""