Cal-E-Force
Helpful Tips

This document provides helpful tips and recommendations on avoiding errors while navigating the Cal-E-Force system.

Forgotten Password

If you forget your password, quickly reset your password via the link on the login page as shown in the Resetting Your Password Reference Guide

Reports

Trainees with less than 8 hours: Use the Trainee Total Hours report. Export the Details Only version of the report and sort/filter the Total Valid Hours column in Excel, as shown in the Accessing Reports Video Guide. Don't use the Trainees with 8 or more hours report

Reports with 2+ contracts: To view a report for only one contract, you must filter the report by contract number, as shown in the Accessing Reports Reference Guide

Uploading Files

1 Save your completed upload file as a "**CSV (Comma delimited)**" if using a PC or a "**Comma Separated Values (.csv)**" if using a Mac

2 Don't use **commas** in your CSV (For example, use the number "1500" instead of "1,500")

3 Use the correct **headers** as shown on the upload standard template file. Don't use old or edited headers in your CSV upload file. See the Reference Guides and Video Guides for uploads to help determine correct headers

4 Avoid using incorrect **upload codes** when creating an upload file by downloading the correct upload codes from the upload pages on Cal-E-Force or using the Reference Guides and Video Guides for uploads to determine upload codes

5 To avoid incorrect **trainee IDs**, use the exact Trainee ID from Cal-E-Force when filling out the upload file. Don't add or remove any 0's from Trainee IDs when creating an upload file (I.e. Trainee ID was created as 00147 but user is incorrectly entering 147 on the upload CSV)

6 **Never reuse** a CSV. Make all edits while the file is still an Excel spreadsheet and then save as a CSV. If additional edits are needed, open a new Excel spreadsheet and save as a new CSV when done.

7 To identify upload errors, check your e-mail when the upload is complete. Cal-E-Force will send an e-mail to the address on file. Click on the **link** in the e-mail to access the **Upload Error Reports** as shown in the Upload Error Reports Video Guide
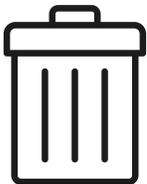
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INVOICING

Discarding an Invoice

Don't leave the payment page after starting an invoice. This will automatically save a draft of the invoice. Continue to a page that contains the button, "Discard Invoice," and select this button as shown in the Discarding a Draft Invoice Reference Guide

Reopening a Draft Invoice

To recover a saved draft invoice, return to the Contract Detail Page and click on the Create Invoice button. Select the same type of invoice as your draft. You will be taken to the last saved draft of your invoice

Close-Out Invoice: Trainees with 8+ Hours

For all trainees with 8 or more hours who have not been claimed on progress payments, you must either (1) submit a first and second progress payment for the trainees or (2) drop the trainees as shown in the Mass Drop Trainees Reference Guide

Timelines

15 days — The standard turnaround time to process **Progress Payments** is *15 days*

60 days — The standard turnaround time to process **Final** and **Close-out Payments** is *60 days*

Invoices are processed on a first in, first out basis

Additional time may be required due to the availability of reported quarterly wages for verification of the retention requirements, and/or pending clarification of additional information, if needed

Intervals

Progress Payments: Most contracts have an invoicing interval of 10 days for progress payments, meaning you must wait *10+ days* from the time of your last progress payment before attempting to submit another to avoid receiving an error

Final Payments: Most contracts have an invoicing interval of 30 days for final invoices, meaning you must wait *30+ days* from the time of your last final payment before attempting to submit another to avoid receiving an error