

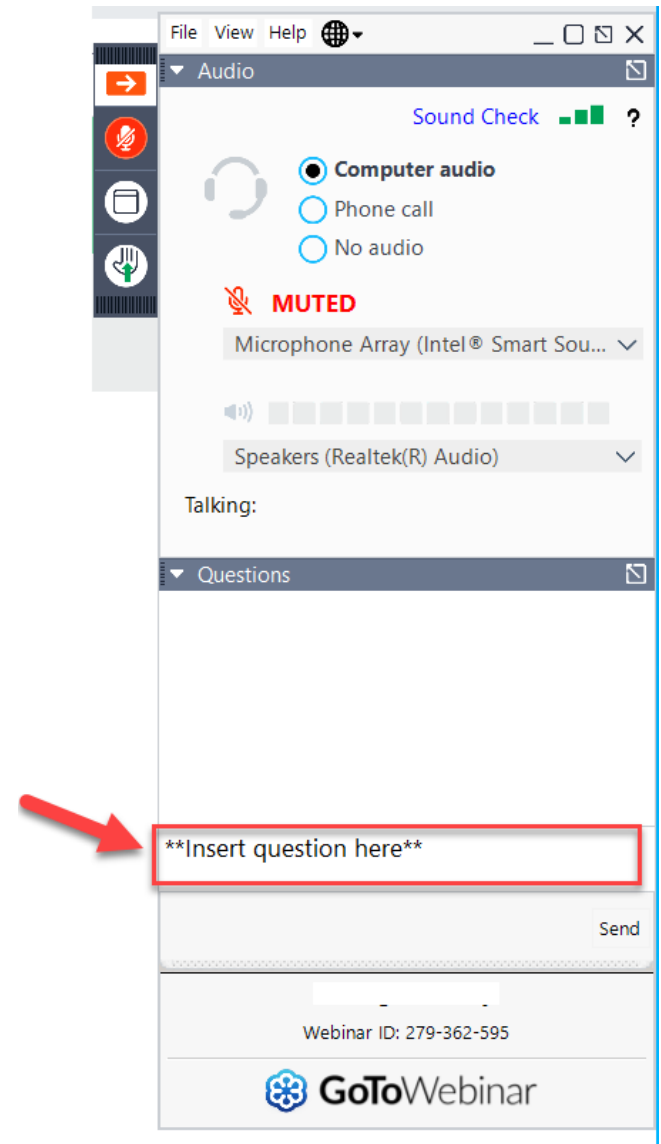
Cal-E-Force

Single Employer Contract
Management Walkthrough



Meeting Structure

- ❑ Using GoToWebinar - instructions for access were e-mailed when you registered
 - Ask a question through GoToWebinar
- ❑ Format: Blocked 1.5 hours
 - Introduction and Guided Tour will take approximately 60 minutes
 - Allows time for questions throughout
 - Additional questions or inquiries can be emailed to the Command Center at ETPCalEForce@etp.ca.gov



Cal-E-Force Resources

WHAT	WHERE
User Guides, videos, & system enhancements for external users	ETP Website > Cal-E-Force section
FAQs (Cal-E-Force only)	ETP Website > Cal-E-Force section
Command Center/Help Desk	ETPCalEForce@etp.ca.gov

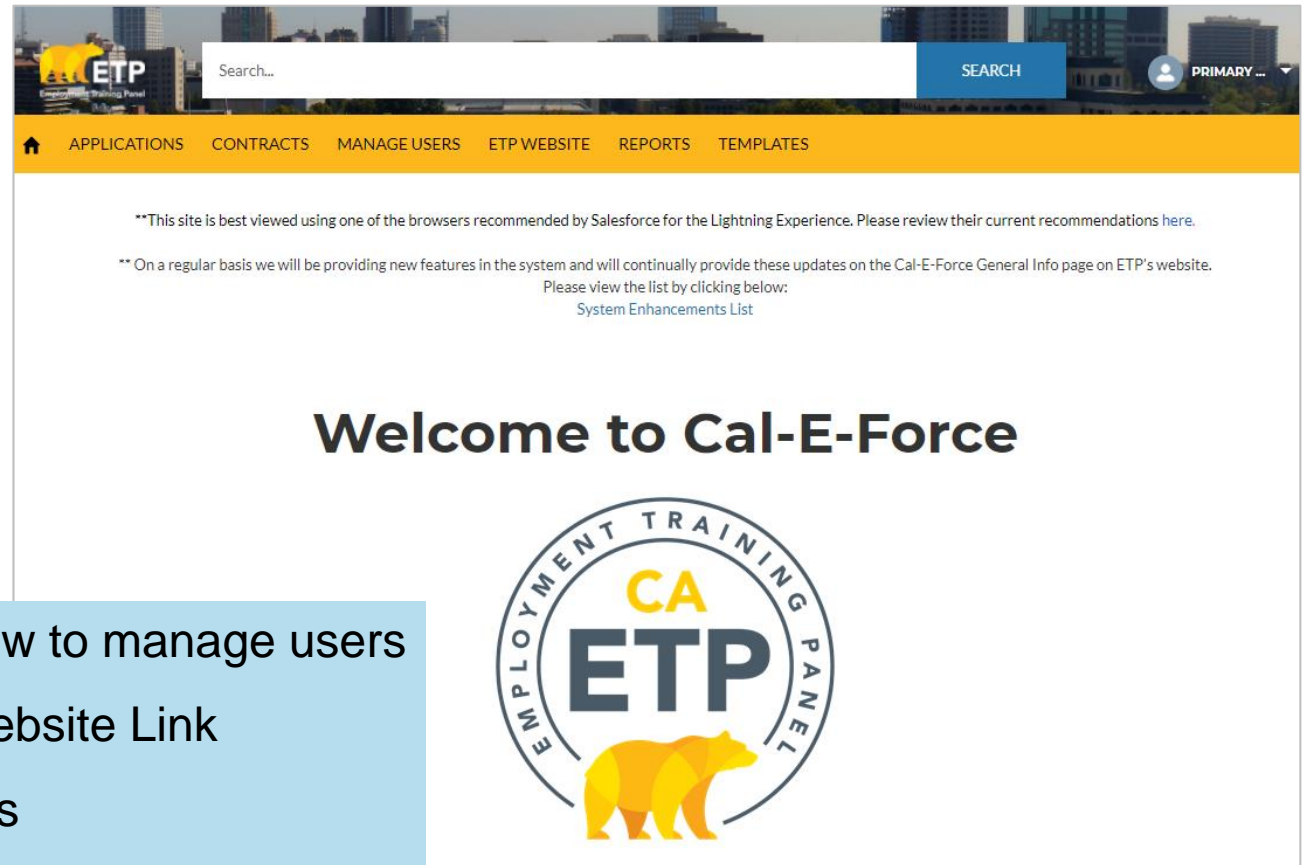


Guided Tour of Cal-E-Force

- ☐ Walk through of Major Functional Screens
- ☐ Use of the Button Bar
- ☐ Available Reports



Landing Page (1 of 1)




- ✓ Will demonstrate how to manage users
- ✓ Discuss the ETP Website Link
- ✓ Simple login process
- ✓ Simple, easy to navigate with quick links



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Contract Management (1 of 6)


APPLICATIONS CONTRACTS MANAGE USERS ETP WEBSITE REPORTS TEMPLATES						
<div>Contracts</div> <div>All Contracts ▾ </div>						
1 item • Sorted by Contract Number • Filtered by All contracts • Updated a few seconds ago						
	Contract Number ↑ ▾	View Contract ▾	Performance % ▾	Account Name ▾	Status ▾	Primary Contact
1	ET22-001-000	View	0.00%	Test Account	Contract Executed	Contact, Primary

Contract information in **one place**, including: contract value, financial information, locations, trainees, job numbers, revisions and invoices



Contract Management (2 of 6)

 APPLICATIONS CONTRACTS MANAGE USERS ETP WEBSITE REPORTS TEMPLATES

 Contract
ET22-001-000

[+ Follow](#)

Account Name	Status	Term Start Date	Term End Date
Test Account	Contract Executed	6/28/2021	6/27/2023

[ENROLL TRAINEES](#)[UPLOAD TRAINEES](#)[ADD HOURS](#)[UPLOAD HOURS](#)[UPLOAD CBT HOURS](#)[UPDATE ROSTERS](#)[ADD CBT CLASS](#)[CREATE INVOICE](#)[REQUEST REVISION](#)[ADD WORKPLACE](#)

Button Bar

The “button bar” is at the top of the Contracts Detail page and your gateway to managing Enrollments, Hours Tracking and Invoicing.



Contract Management (3 of 6)

The Contract Details Page contains:

1. Contract Information
 2. Contract Value
 3. Invoice Intervals
- Continued...*

▼ Contract Information

Contract Number
19CS-0009-000

Account Name
[Kamus Keller, Inc.](#)

Contract Holder Type
Single Employer Contract (SE)

Status
Contract Executed In Progress

Retention Period
90

Estimated Number of Trainees
27

Monitoring Analyst
Marisol Niquet

Regional Office
North Hollywood Regional Office

Term Start Date
7/28/2018

Term End Date
7/27/2020

Hold
☐

Credit Only
☐

▼ Contract Value

Total Contract Amount
\$20,358.00

In Kind Contribution
\$55,640.00

▼ Invoice Intervals

Progress Invoice Billing Interval
10

Final Invoice Billing Interval
30

Last Progress Invoice Requested Date
8/10/2020

Last Final Invoice Requested Date
8/14/2020



Contract Management (4 of 6)

The Contract Details Page contains:

4. Financial Information
5. Subcontractors
6. Delivery Method / Training Type

Continued...

Financial Information

Total Invoiced Amount
\$6,106.62

Total Earned Amount
\$0.00

Total Support Cost
\$0.00

Total Adjusted Invoiced Amount
\$0.00

Adjustment Balance
(\$1,139.82)

Job Admin Costs
\$0.00

75% of Contract Value
\$15,268.50

Progress Payments Available Until 75%
\$11,498.50

Performance % ⓘ
0.00%

Subcontractors

Development Subcontractor
[TRAINING FUNDING SOURCE](#)

Administrative Subcontractor
[TRAINING FUNDING SOURCE](#)

Training Subcontractor

Development Cost of Services
\$1,900.00

Administrative Cost of Services
13.00%

Training Cost of Services

Delivery Method / Training Type

Delivery Method Type
Classroom/Simulated Laboratory

Training Type
Business Skills;Commercial Skills;Computer Skills



Contract Management (5 of 6)

The Contract
Details Page
...continued:

- 7. Entities & Locations
- 8. Trainees
- 9. Job Numbers



Entities and Locations (4)

WORKPLACE	ACCOUNT	NUMBER OF TRAINEES
1. New York Office (Headquarters)	Account A	4
2. San Diego Office	Account A	23



Trainees (6+)

NAME	TRAINEE STATUS	EXTERNAL ID
Smith, Brian	Enrolled	18CS-0155-001-2-1234
Santana, Tracy	Enrolled	00000160-2-1235
Doe, John	Enrolled	00000160-2-1236



Job Numbers (3)

JOB NUMBER DESCRIPTION	ESTIMATED NUMBER OF TRAINEES	WEIGHTED AVERAGE HOU
5. Retrainees	100	200.00
6. Retrainee Veterans	200	50.00
7. Job Creation	50	25.00



Contract Management (6 of 6)

The Contract Details Page

...continued:

- 7. Revisions
- 8. CBT Classes
- 9. Overpayments
- 10. Invoices

Revisions (6)

Revision Number	Revision Type	Revision Status	Request Date
CR-0889		Submitted	10/20/2020
View All			

CBT Classes (6+)

Class	Training Type	Total Standard Hours
Test class 123	Business Skills	10.00
View All		

Overpayments (4)

Overpayment Number	Status	Total Overpayment Amount	Payments Received
OPN-00000		\$10,000.00	\$0.00
View All			

Invoices (21)

INVOICE NAME	RECORD TYPE	INVOICE DATE	STATUS	AMOUNT
Repayment Invoice - TEST Neg CR-OP	Repayment Invoice	2020-10-22	Requested	\$0.00
View All				



Add Workplace

1

ADD CBT
CLASS

CREATE
INVOICE

REQUEST
REVISION

ADD
WORKPLACE



✓ Must be done prior to enrolling trainees on new contracts

2

Add Workplace

Add Workplace

* Location Name

Address

Street

City

State/Province

Zip/Postal Code

Country

NEXT



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Enrollments (1 of 3)



Contract
ET22-001-000

Account Name
Test Account

Status
Contract Executed

Term Start Date
6/28/2021

Term End Date
6/27/2023

ENROLL
TRAINEES

UPLOAD
TRAINEES

ADD
HOURS

UPLOAD
HOURS

UPLOAD CBT
HOURS

UPDATE
ROSTERS

ADD CBT
CLASS

CREATE
INVOICE



Manual



CSV Upload

- ✓ Ability to enroll manually
- ✓ Ability to enroll using CSV



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Enrollments (2 of 3) - Manual

- ✓ Reduced amount of data required to enroll
- ✓ Not associating enrollees to occupations

Information

SSN ⓘ	*	<input type="text"/>
Employee ID ⓘ		<input type="text"/>
Trainee First Name	*	<input type="text"/>
Trainee Last Name	*	<input type="text"/>
Trainee Middle Name		<input type="text"/>
Hire Date	*	<input type="text"/> [11/16/20
Trainee Status		Enrolled
Job Number	*	<input type="text" value="-None-"/>
Workplace	*	<input type="text" value="-None-"/>

Demographic Data

Gender	*	<input type="text" value="--None--"/>
Age Group	*	<input type="text" value="--None--"/>
Education	*	<input type="text" value="--None--"/>
Veteran	*	<input type="text" value="No"/>
Disabled Veteran		<input type="text" value="No"/>
Ethnicity	*	<div>Available White African American/Black Ethnic Hispanic or Latino</div>



Enrollments (3 of 3) - Uploads

Please Upload your CSV file here: No file chosen

Note: Please use the standard template to upload Trainees data. [Click Here](#) to download the template

TRAINEE FIRST NAME	TRAINEE LAST NAME	JOB NUMBER	WORKPLACE	TRAINEE STATUS	GENDER	AGE GROUP	VETERAN	ETHNICITY	DISABLED
Kelsey	Test	Group 2	General Dynamics NASSCO	Enrolled	Female	25-34		White	No
Eley	Testy	Group 2	NASSCO MV	Placed	Male	25-34	<input type="checkbox"/>	White	No

When you are satisfied with the data map above, click the Upload Trainee data button to insert the Trainee records.

✓ Partial upload success and error management



Hours Tracking (1 of 3)

🏠 CONTRACTS MANAGE USERS ETP WEBSITE REPORTS

 Contract
Contract 1

Account Name	Status	Term Start Date	Term End Date
Account 1	Contract Executed In Progress	12/13/2017	2/13/2021

ENROLL
TRAINEES

UPLOAD
TRAINEES

ADD
HOURS

UPLOAD
HOURS

UPLOAD CBT
HOURS

UPDATE
ROSTERS

ADD CBT
CLASS

CREATE
INVOICE

REQUEST
REVISION


Manual


CSV Upload


CSV Upload

- ✓ Ability to add hours manually
- ✓ Ability to upload hours using CSV



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Hours Tracking (2 of 3) - Manual

- ✓ Reduced amount of data required to track hours
- ✓ Simplified
 - Removal of class titles (except for CBT hours)
 - Simplified curriculum structure
- ✓ Retrievable data pertaining to hours tracking

The screenshot shows the ETP (Employment Training Partnership) website interface. At the top, there is a search bar and navigation links for 'CONTRACTS', 'MANAGE USERS', and 'ETP WEBSITE'. Below this is a table titled 'Trainees' with columns: FIRST NAME, LAST NAME, JOB NUMBER, SSN, TRAINEE STATUS, TOTAL VALID HOURS, WORKPLACE, and EMPLOYEE ID. The table lists 12 trainees. A blue arrow points from the table to a form below it. The form has fields for 'Delivery Method *', 'Training Type *', 'Roster Number', 'Date *', and 'Total Hours *'. The 'Training Type *' dropdown menu is open, showing a list of skills: Business Skills, Commercial Skills, Green/Clean Skills, Hazardous Materials Skills, Management Skills, Manufacturing Skills, Literacy Skills, and Job Readiness Skills. A 'Submit' button is at the bottom of the form.

FIRST NAME	LAST NAME	JOB NUMBER	SSN	TRAINEE STATUS	TOTAL VALID HOURS	WORKPLACE	EMPLOYEE ID
Joe	Root	3		Enrolled	0.0	Sacramento	569820
Jonny	Bairstow	3		Enrolled	8.0	Sacramento	569821
Jos	Buttler	3		Enrolled	8.0	Sacramento	569822
Josh	Hazlewood	1		Enrolled	0.0	San Jose	901235
Kane	Williamson	2		Enrolled	2.0	Portland	569810
Lisa	Stalekar	2		Enrolled	0.0	Portland	303832
Martin	Guptill	2		Enrolled	3.0	Portland	569811
Meg	Lanning	3		Enrolled	0.0	Sacramento	835212
Megan	Schutt	1	****-4267	Enrolled	8.0	San Jose	569809
Mitchell	Starc	1	****-0123	Enrolled	0.0	San Jose	569855

Delivery Method * --None--

Training Type * --None--

Roster Number

Date *

Total Hours *

Submit

Training Type *

- None--
- Business Skills
- Commercial Skills
- Green/Clean Skills
- Hazardous Materials Skills
- Management Skills
- Manufacturing Skills
- Literacy Skills
- Job Readiness Skills



Hours Tracking (3 of 3) - Upload

Please Upload your CSV file here: No file chosen

Note: Please use the standard template to upload Hours data. [Click Here](#) to download the template

TRAINEE	ROSTER NUMBER	DATE	NUMBER OF HOURS	DELIVERY METHOD	TRAINING TYPE
	456	5/15/2019	8.0	Classroom/Simulated Laboratory	Commercial Skills
	456	5/15/2019	4.0	Classroom/Simulated Laboratory	Computer Skills
	456	5/15/2019	5.0	Classroom/Simulated Laboratory	Computer Skills
		5/14/2019	2.0	Classroom/Simulated Laboratory	Commercial Skills
		5/14/2019	8.0	Classroom/Simulated Laboratory	Computer Skills

When you are satisfied with the data map above, click the Upload Hours data data button to insert the Hour records.

- ✓ Partial upload success and error management
- ✓ With roster numbers mandatory users will be able to mass edit and have duplicate detection



Invoicing (1 of 2)

1

ENROLL TRAINEES UPLOAD TRAINEES ADD HOURS UPLOAD HOURS **CREATE INVOICE** REQUEST REVISION

▼ Contract Information

Contract Number 18CS-0155-002	Contract Start Date 4/30/2019
----------------------------------	----------------------------------

2

🏠 CONTRACTS MANAGE USERS ETP WEBSITE

Choose Invoice Type

☐ Progress
☐ Final
☐ Close - Out

Next

- ✓ Screen to enter invoice requests
- ✓ Greater transparency around invoice adjustments
- ✓ System provided editable default values on final invoice



Invoicing (2 of 2)

3

Invoice Progress Temp

Search by Name

Previous

Back to Contract

Save

Next

FIRST NAME	LAST NAME	EMPLOYEE ID	SOCIAL SECURITY NO	JOB NUMBER	<input type="checkbox"/> P1	<input type="checkbox"/> P2	DROP
Jonny	Bairstow	569821					
Jos	Buttler	569822					
Colin	De Grandhomme	569815					
Aaron	Finch	569801					
Glen	Maxwell	569800					
Anna	Petersen	569818					
Andrew	Tye	569804					
Elyse	Villani	569808					

Previous

Back to Contract

4

BCCI - INV-0000368

Invoice Date
2019-05-02

Contract Number
00000163

Total Amount Requested
\$279.06

Adjusted Total Amount Requested
\$279.06

PAYMENT TYPE	JOB NUMBER	NUMBER OF TRAINEES	TOTAL
P1	1	1	\$695.00
P2	1	1	(\$528.14)
P1	3	2	\$373.50
P2	3	2	(\$261.30)

Invoice Notes

Adjustments Applied

Adjustment Balance Remaining
\$0.00

Previous

Submit

- ✓ Ability to filter and sort
- ✓ Greater transparency around invoice adjustments
- ✓ Editable default values on final invoice



Request a Revision Update

1

TRAINEES ADD HOURS UPLOAD HOURS CREATE INVOICE REQUEST REVISION

2

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

Contractor Name Change To

* Revision Term Start Date

* Revision Term End Date

☐ Delivery Methods / Training Types

☐ Curriculum Changes

☐ Revise Trainee Wages

☐ Revise Trainee Hours / Range of Hours

☐ Revise Job Titles

☐ Add New Job Number(s)

☐ No. to Train or Funding Btwn. Job No.'s

☐ Other

☐ Revise Standard Contract Language

* Reason

CANCEL

SUBMIT

- ✓ Simple way to submit revision requests
- ✓ Ability to check the status of revision requests
- ✓ All revision details on one page



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Thank You!

- Reference Guides and new features will be posted on the ETP website
- The Cal-E-Force Command Center will be available to assist with questions, providing ideas, and comments

✉ ETPCalEForce@etp.ca.gov

- An Executive-Level Contact is provided - Tara Armstrong

✉ Tara.Armstrong@etp.ca.gov

