

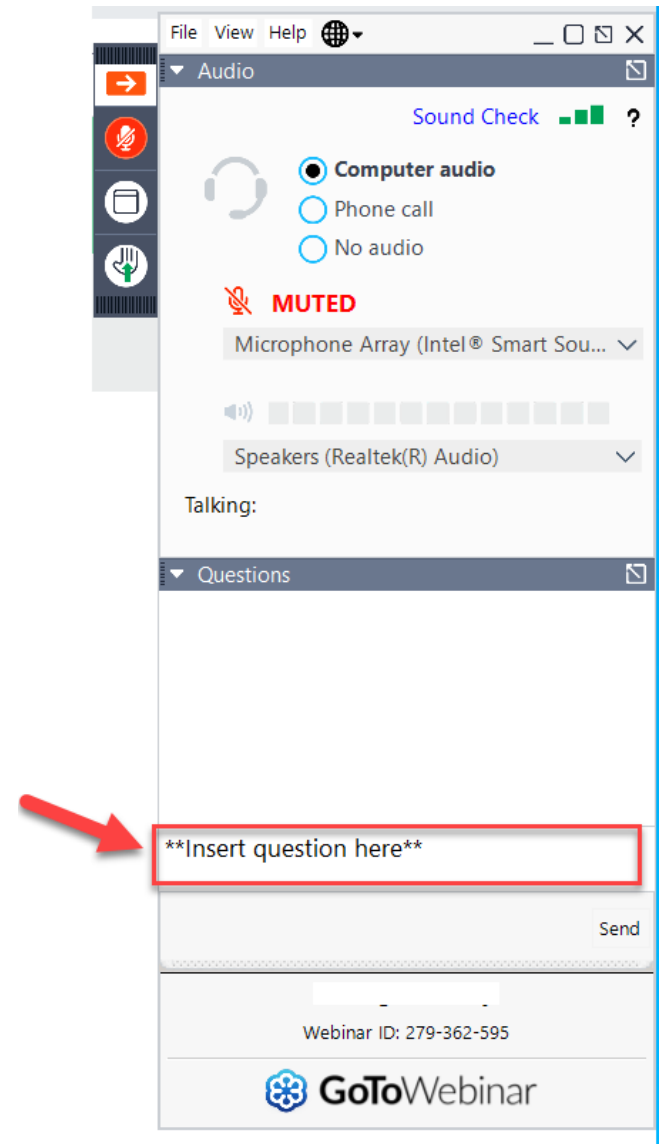
Cal-E-Force

Multiple 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

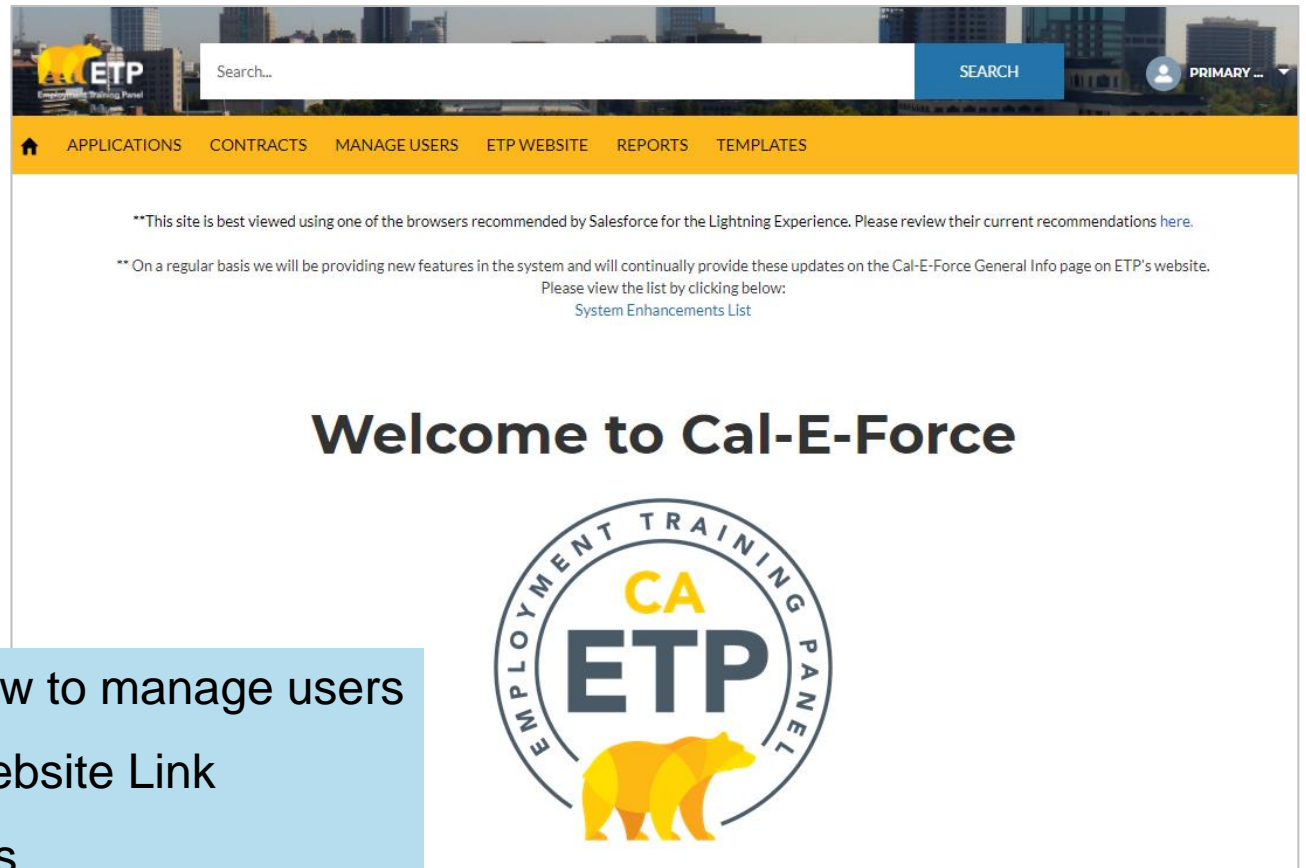


Guided Tour of Cal-E-Force

- 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



Cal E Force

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Contract Management (1 of 6)

🏠 APPLICATIONS **CONTRACTS** MANAGE USERS ETP WEBSITE REPORTS TEMPLATES

Contracts
All Contracts ▾ ↗


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)

 Contract
ET22-002-000 + 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](#) [NEW CERTIFICATION](#)

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

TestMECContract

Account Name

TestAccount

Contract Holder Type

Multiple Employer Contract (MEC)

Status

Contract Executed In Progress

Retention Period

90

Estimated Number of Trainees

100

Monitoring Analyst

Alayna Mollick

Regional Office

Sacramento Regional Office

Term Start Date

3/1/2021

Term End Date

3/29/2023

Hold

Credit Only

Contract Value

Total Contract Amount

\$128,800.00

In Kind Contribution

\$0.00

Invoice Intervals

Progress Invoice Billing Interval

0

Final Invoice Billing Interval

0

Last Progress Invoice Requested Date

Last Final Invoice Requested Date



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)

Certifications (1)

Tax ID	Certification Number	Participating Employer	Certification Status
234-5678	C-00000355	SPEED DOOR SOLUTIONS, INC.	Pending

Entities and Locations (2)

Location Name	CEAN	Address	Location Number
SPEED DOOR SOLUTIONS, INC.	234-5678	756 S PARK HYDE ST ORANGE, CA 92868	1
Main Office	123-4567	1100 J Street Sacramento, CA 95814 United States	2

Trainees (6+)

Employee ID	Name	Workplace CEAN	Trainee Status
TE188	TestFirst188 TestLast189	234-5678	Enrolled
TE189	TestFirst189 TestLast189	234-5678	Enrolled

[View All](#)

The Contract
Details Page
...continued:

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



Contract Management (6 of 6)

Job Numbers (2)

Job Number Description	Estimated Number of Trainees	Weighted Average Hours	Average Cost Per Trainee
R18 - DE - Retrainee - Standard	100	28.00	\$644.00
R18 - DE - NewHire - Standard	100	28.00	\$644.00

[View All](#)

Revisions (1)

Revision Number	Revision Type	Revision Status	Request Date
CR-0972		Submitted	6/7/2021

[View All](#)

CBT Classes (2)

Class	Training Type	Total Standard Hours
CBTClassTest1	Business Skills	8.00
CBTClassTest2	Commercial Skills	8.00

[View All](#)

Invoices (1)

INVOICE NAME	RECORD TYPE	INVOICE DATE	STATUS	AMOUNT
1	Progress	2021-06-07	Approved	\$1,304.00

[View All](#)


The Contract
Details Page

...continued:

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



Enrollments (1 of 3)

 Contract ET22-001-000							
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



Manual



CSV Upload

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



Enrollments (2 of 3) - Manual

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

Information

SSN * 000000188

Employee ID 1 TE188

Trainee First Name * TestFirst188

Trainee Last Name * TestLast189

Trainee Middle Name

Hire Date * [6/7/2021]

Trainee Status Enrolled

Job Number * 1. R18 - DE - Retrainee - St: ▼

Workplace * 1. SPEED DOOR Solutio ▼
-None-
1. SPEED DOOR SOLUTIONS, INC. - 234-5678

Demographic Data

Gender * --None-- ▼

Age Group * --None-- ▼

Education * --None-- ▼

Veteran * No ▼

Disabled Veteran No ▼

Ethnicity * Available
White
African American/Black
Ethnic Hispanic or Latino





Enrollments (3 of 3) - Uploads

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	GENDER	AGE GROUP	DISABLED V
***- **-0189	TE189	TestFirst189	TestLast189	R18 - DE - Retrainee - Standard	234-5678	SPEED DOOR SOLUTIONS, INC.	1/1/2020	Female	Under 25	Yes
***- **-0190	TE190	TestFirst190	TestLast190	R18 - DE -		SPEED DOOR				

Mon 6/7/2021 10:36 AM

 Test Contact <alayna.mollick@etp.ca.gov>
Sandbox: Trainee Upload Status Email

To:  Mollick, Alayna@ETP

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

Upload completed on 2021-06-07 10:35:40.

Number of failed rows:1

There were errors found on the upload. Please click on the following link for the error report:
<https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fcaetp.force.com%2Fs%2Freport%2F000t000000HGaQEAWtrainees-error-report&data=04%7C01%7CAlayna.mollick%40etp.ca.gov%7Cb00db31ad1394be7109508d929daaba2%7C608787d3f5f44629a77b6fe496953b1a%7C0%7C0%7C637586841430814955%7CUnknown%7C>

✓ 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



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

search

FIRST NAME	LAST NAME	JOB NUMBER	TRAINEE STATUS	SSN	TOTAL VALID HOURS	CEAN	WORKPLACE	EMPLOYEE ID
TestFirst188	TestLast189	1	Enrolled	***-**-0188	8.00	234-5678	SPEED DOOR SOLUTIONS, INC.	TE188
TestFirst189	TestLast189	1	Enrolled	***-**-0189	16.00	234-5678	SPEED DOOR SOLUTIONS, INC.	TE189
TestFirst190	TestLast190	1	Enrolled	***-**-0190	16.00	234-5678	SPEED DOOR SOLUTIONS, INC.	TE190

Show More: 10 First Page Previous Next Page

Hours Data

Delivery Method * --None--

Training Type * --None--

Roster Number

Date *

Total Hours *

Submit

Training Type *

- None--
- 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 TRAINEE'S ADD HOURS UPLOAD HOURS CREATE INVOICE REQUEST REVISION

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

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

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




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Add Workplace (1 of 2)

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

* CEAN

* Location Name

Address

Street

City

State/Province

Zip/Postal Code


Country

NEXT



PE Certifications (1 of 8)

🏠 CONTRACTS MANAGE USERS ETP WEBSITE REPORTS

 Contract
19CS-0009-000

Account Name	Status	Term Start Date	Term End Date
Kamus Keller, Inc.	Contract Executed In Progress	7/28/2018	7/27/2020

ENROLL TRAINEES UPGRADE TRAINEES ADD HOURS UPGRADE HOURS UPDATE ROSTERS CREATE INVOICE REQUEST REVISION **NEW CERTIFICATION**



Button Bar

The “button bar” is at the top of the Contracts Detail page and your gateway to manage MEC Participating Employers Certifications.



PE Certifications (1 of 8)

New Participating Employer Certification

Provide the California Employer Account Number (CEAN) for the Participating Employer.

CEAN#

NEXT

- ✓ Simple way to submit New PE Certification
- ✓ Provided CEANs will be validated and messaging provided when validation fails, based on the Online Forms process

Note: The number of steps can vary depending on the funding/contract, this is an example of an Out of State Competition (OSC) Retrainee Scenario



PE Certifications (3 of 8)

- ✓ Same as Legacy PE Certification Data
- ✓ Pulls over NAICS, Legal Name, and Address
- ✓ Provide number of employees (Worldwide and California), and Professional Employer Organization (PEO)

New Participating Employer Certification	
CEAN #	<ul style="list-style-type: none">• 123-4567
NAICS	<ul style="list-style-type: none">• 541310
Legal Name	<ul style="list-style-type: none">• EMPLOYMENT TRAINING PANEL
	<input type="checkbox"/> This is NOT the correct Legal Name
* Street	1100 J ST
* City	SACRAMENTO
* State	CA
* Zip	95811
* Number of Full-Time Employees Worldwide	
* Number of Employees in California	
	<input type="checkbox"/> Professional Employer Organization (PEO)?



Employee Turnover Information

* Turnover Rate for Full-Time Employees

Union Support

* Company Employees represented by a Union

- Yes
- No

* Employees to be trained represented by a Union

- Yes
- No

Justify Need for Training

* Briefly explain the nature of your business and describe your business' purpose for participating in this training program

Commitment to Training

* Do you currently have a Training Program?

- Yes
- No

PE Certifications (4 of 8)

PE Certification Questions
are consistent with Legacy
Process



New Participating Employer Certification

PE Certifications (5 of 8)

Employer Contribution

* Describe your Company's Contribution towards training related expenses by selecting all that apply: ⓘ

- Pay Trainee Wages During Training
- Contribute equipment, materials, supplies, or space for Training
- Contribute staff time to conduct training assessments or coordinate training
- Pay Employer Fee
- Other

* Estimate amount contributed to the above noted training-related costs:

* List the number of trainees that will be receiving mandatory training

* List the number of trainees that will be receiving voluntary training

Compensatory Nature of Training

Employer is aware of, and will abide by, the standards of compensating employees for time spent in "mandatory" training that is directly job-related, pursuant to state and federal work orders enforced by the Division of Labor Standards Enforcement (DLSE). (See DLSE Manual at Section 46.6.5).

* Compensatory nature of training accepted

- Yes
- No



PE Certifications (6 of 8)

Employee Turnover Information

* Turnover Rate for Full-Time Employees

25

Turnover Waiver Request

Acceptable circumstances for a waiver are: (1) if an employer has experienced and provides evidence of a singular reduction in its workforce (an anomaly); or (2) industry data supports a higher rate. Multiple Employer Contracts do not include a Turnover Penalty clause. Multiple Employer Contracts do include a Representation that Participating Employers will not exceed a 20% Turnover Rate, as made by the contractor at the time the ETP100 MEC is executed. See Section 2.4.

* Turnover Request Reason

Singular Reduction in Workforce

Waiver Supporting Documents

 **UPLOAD FILES** Or drop files

Union Support

* Company Employees represented by a Union

Yes
 No

* Employees to be trained represented by a Union

Yes
 No

* Identify Union and Local

✓ Fields requiring more information will automatically appear if needed



PE Certifications (7 of 8)

Your certification information has been **automatically approved.**

Finish or Continue

- Continue to Next Participating Employer
- Finish and Return to Contract

OR

Your certification information has been **submitted for review.**

Finish or Continue

- Continue to Next Participating Employer
- Finish and Return to Contract

Will be automatically approved, or sent for review based on certification properties



PE Certifications (8 of 8)



Certifications (6+)

Certification Number	Participating Employer	Certification Status
C-00000001	Blue Goo, INC.	Approved
C-00000002	Tripper and Tripper, LLC.	Pending
C-00000003	White, Redding, and Weitz Attorneys	Denied
C-00000005	Coolin' No Foolin', INC.	Approved
C-00000007	Texas Stampede	Approved
C-00000008	Range Rover of San Marcos	Pending

✓ You can view your submitted certifications and their statuses at any time

Question: Would you like the ability to receive an alert when your pending status changes to either Denied or Approved?



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

☎ 844-729-2070

✉ ETPCalEForce@etp.ca.gov

- An Executive-Level Contact is provided - Tara Armstrong

✉ Tara.Armstrong@etp.ca.gov

