

## CONSULTANT RATE FORM (CRF)

Instructions for Consultant

ILLINOIS TOLLWAY 2022

## GENERAL OVERVIEW

**VIEW INSTRUCTIONAL VIDEO:** 

https://youtu.be/4gJ5ezcKjaA

## **CONSULTANT RATE FORM (CRF)**

## ROLLED OUT NEW FORM IN 2019 TO REPLACE WFRRS, PRFS AND PEPC FORMS

- Combines multiple pay rate forms into one
- Eliminates the need to submit certified payroll (may be requested later)

#### REASONS TO SUBMIT A NEW CRF

- New Contract
- New Contract Employee
- Promotion of Contract Employee with new classification
- Salary increase of Contract Employee above Max Hourly Rate listed
- Salary increase of Contract Employee is a total of 7% or greater in a running 12-month period
- Name change of Contract Employee

#### **MULTIPLIER PROCESS**

- Contracts with a multiplier of 2.5 and 2.8 must submit a CRF for each multiplier
- If two multipliers, put multiplier that applies to the CRF in parenthesis next to the Contract Number

#### REFERENCE GUIDE

**CRF:** Consultant Rate Form

**PEPC:** Project Employee Payroll Change Form

**PRF:** Payroll Rate Form

WFRR: Work Force Rate Revision Form

**PSB:** Professional Services Bulletin

**DSE:** Design Section Engineer

**CM:** Construction Manager

Download latest Consultant Rate Form under the **Doing Business** section at **illinoistollway.com**:

- Construction and Engineering
  - ► Forms
    - Consultant Rate Form

## SAMPLE CONSULTANT RATE FORM (CRF)

Contract Number		DSE CM	Effective Date: Year of PSB:							Inser Row
	Company Name:							(Enter year Professional Service advertised)	s Bulletin was	Delet Row
Sub-Consultant (	Company Name:		These c	olumns to be comple	eted on all CRFs	These columns to h	ne completed st	arting with second CRF for contract	1	Inse Pag
	ee Name y by Last Name) First	Consultant Classification/Title	Original Hourly Rate at NTP or Promotion	Maximum Hourly Rate for Person/Title (calculated at 125% of	Previous/Current Hourly Rate (from CRF immediately preceding this one)	Updated Hourly Rate (updated rate paid to employee after increase or capped rate)	Percent Increase*	Reason for Change* (select from drop-down menu or type your own)	Eligible for Premium Overtime ? (Y/N)	
				0.00						
				0.00						
				0.00						
				0.00						
				0.00						
				0.00						
				0.00						
				0.00						

## FIRST CRF AT NTP

**VIEW INSTRUCTIONAL VIDEO:** 

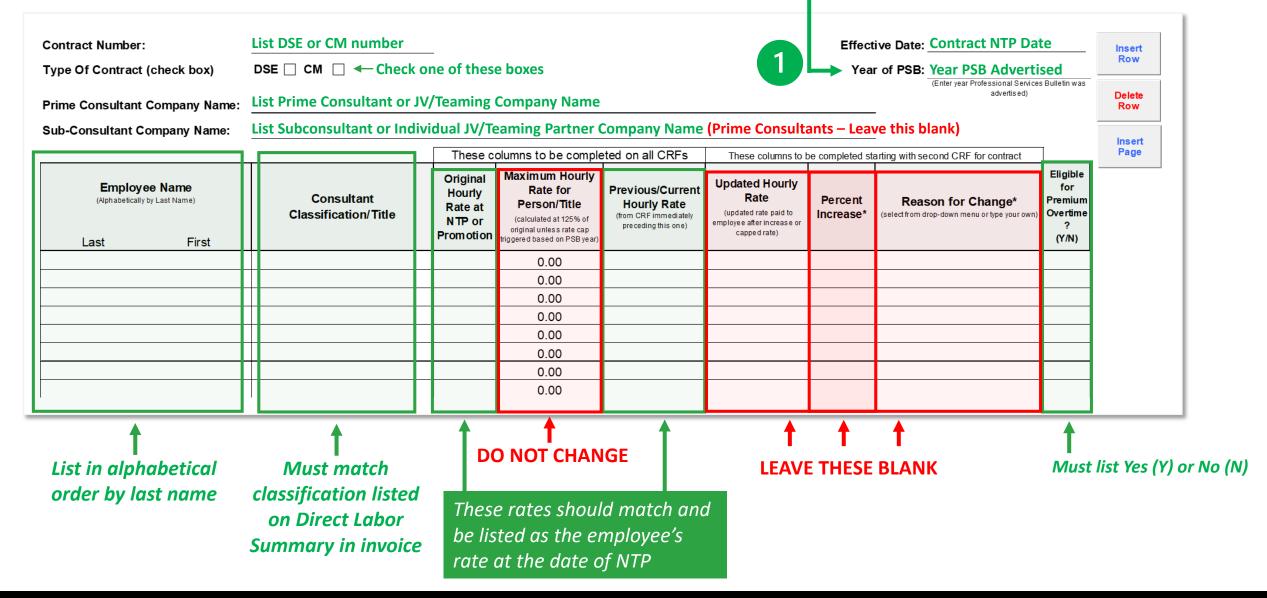
https://youtu.be/j8uNyNsdf5A

## SUBMITTING INITIAL CONSULTANT RATE FORM (CRF) FOR NEW CONTRACTS (from NTP date)

Process is applicable for both prime and subconsultants

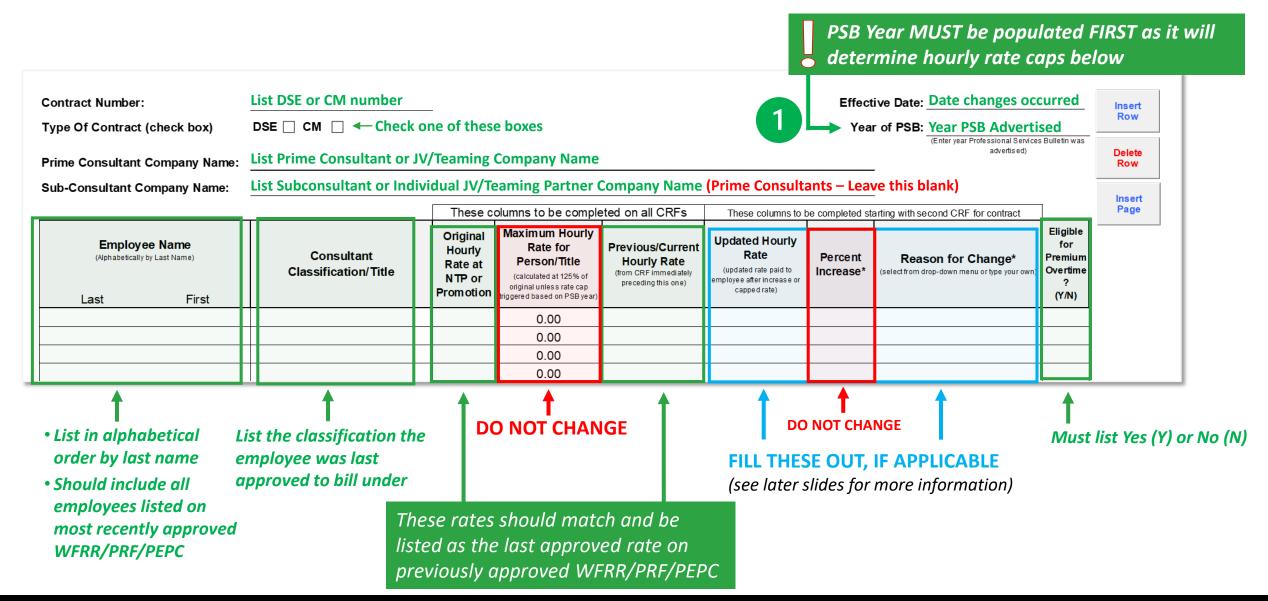
## INITIAL CRF FOR NEW CONTRACTS

PSB Year MUST be populated FIRST as it will determine hourly rate caps below



# CONVERTING FROM A WFRR, PRF OR PEPC TO CONSULTANT RATE FORM (CRF) FOR **EXISTING CONTRACTS**

## CONVERTING TO CRF FOR EXISTING CONTRACTS



## SECOND AND FUTURE CRFs

For new and existing contracts

**VIEW INSTRUCTIONAL VIDEO:** 

## SUBMITTING SECOND AND FUTURE CRFs FOR NEW AND **EXISTING CONTRACTS**

determine hourly rate caps below List DSE or CM number **Effective Date: Date changes occurred** Contract Number: Insert Row DSE  $\square$  CM  $\square$   $\longleftarrow$  Check one of these boxes Type Of Contract (check box) Year of PSB: Year PSB Advertised (Enter year Professional Services Bulletin was Delete List Prime Consultant or JV/Teaming Company Name Prime Consultant Company Name: Row List Subconsultant or Individual JV/Teaming Partner Company Name (Prime Consultants – Leave this blank) **Sub-Consultant Company Name:** Insert Page These columns to be completed on all CRFs These columns to be completed starting with second CRF for contract Eligible Maximum Hourly Original **Updated Hourly Employee Name** Rate for Previous/Current Hourly Consultant Rate (Alphabetically by Last Name) Percent Premium Reason for Change\* Person/Title **Hourly Rate** Rate at Classification/Title (updated rate paid to select from drop-down menu or type your own) Overtime Increase\* from CRF immediately (calculated at 125% of NTP or employee after in crease or preceding this one) original unless rate cap Promotion | iggered based on PSB year (Y/N) First Last 0.00 0.00 0.00 0.00 **DO NOT CHANGE DO NOT CHANGE**  List in alphabetical List the classification the Must list Yes (Y) or No (N) employee was last order by last name FILL THESE OUT, IF APPLICABLE approved to bill under Should include all (see later slides for more information) employees listed on These rates ONLY change These rates ONLY change most recently approved **CRF** with a Classification/Title if a raise was given on Change on the previous CRF the previous CRF

PSB Year MUST be populated FIRST as it will

## RAISE WITHOUT TITLE CHANGE/PROMOTION

**VIEW INSTRUCTIONAL VIDEO:** 

**FAST-FORWARD TO MINUTE 2:11** 

## SUBMITTING A RAISE WITHOUT A TITLE CHANGE

### 1. How to submit a CRF documenting a raise, but no title change

		-	I nese c	olumns to be compl	eted on all CRFs	These columns to b	oe completed st	arting with second CRF for contract	
Employee Name (Alphabetically by Last Name)		Consultant Classification/Title	Original Hourly Rate at NTP or	Maximum Hourly Rate for Person/Title (calculated at 125% of original unless rate cap	Previous/Current Hourly Rate (from CRF immediately preceding this one)	Updated Hourly Rate (updated rate paid to employee after increase or capped rate)	Percent Increase*	Reason for Change* (select from drop-down menu or type your own)	Eligible for Premium Overtime ?
Last	First		Promotion	original unless rate cap triggered based on PSB year)		capped rate)			(Y/N)
Вох	Jack	Engineer I	26.00	32.50	26.00	27.00	3.8%	Raise	N



This column is automatically calculated

### 2. How to submit the next CRF, following the raise

						olumns to be comple	These columns to be completed starting with second CRF for contract				
Employee Name (Alphabetically by Last Name)  Last First			Consultant Classification/Title		Original Hourly Rate at NTP or Promotion	Maximum Hourly Rate for Person/Title (calculated at 125% of original unless rate cap triggered based on PSB year)	Previous/Current Hourly Rate (from CRF immediately preceding this one)	Updated Hourly Rate (updated rate paid to employee after increase or capped rate)	Percent Increase*	Reason for Change* (select from drop-down menu or type your own)	Eligible for Premiun Overtime ? (Y/N)
Вох	Jack	Т	Engineer I	П	26.00	32.50	27.00				N
		Ц									
		Ц									
					<b>A</b>	<b>A</b>					

T T

DO NOT CHANGE

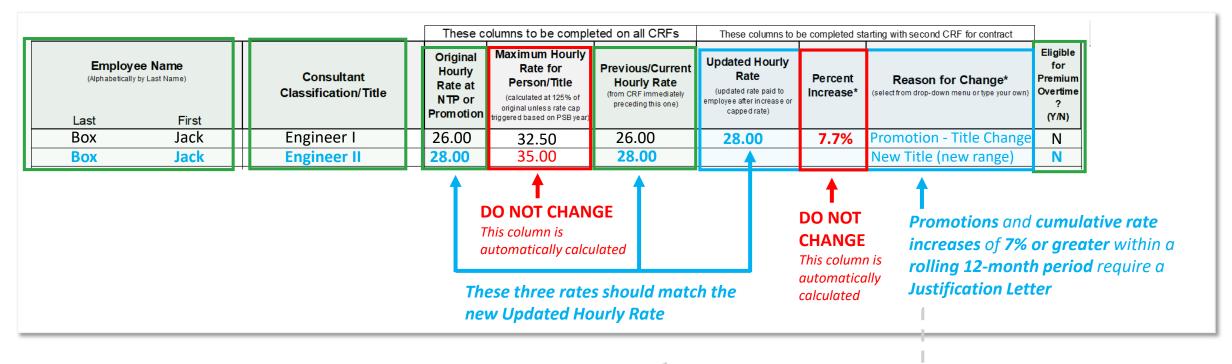
List Updated Hourly Rate from previous CRF

## EMPLOYEE TITLE CHANGE/PROMOTION

**VIEW INSTRUCTIONAL VIDEO:** 

**FAST-FORWARD TO MINUTE 4:50** 

## EXAMPLE: EMPLOYEE CLASSIFICATION/TITLE CHANGES



#### EMPLOYEE TOTAL WAGE INCREASE PROCESS

Updated CRF must be submitted if increase is 7% or greater in a running 12-month period or if the Updated Hourly Rate exceeds the Maximum Hourly Rate

- Submit updated CRF and detailed Justification Letter to Document Control for Deputy Chief review
  - The justification letter **must** include:
    - ✓ Names of the employees receiving the raises
    - ✓ Cumulative % increase over the running 12-month period
    - ✓ Detailed explanation for each employee who received a raise greater than 7%

## SUBMITTING A JUSTIFICATION LETTER

### SUBMITTING A JUSTIFICATION LETTER

#### LETTER MUST INCLUDE:

- Names of each employee receiving raises
- Dates of when the employee(s) received the raise(s)
- Dollar amount and percentage of each raise (within running twelve-month period)
- The cumulative raise percentage the employee received during running twelve-month period
- A separate justification for each employee explaining why they received a cumulative raise of 7% or greater
- Indicate if raise(s) given will impact the Upper Limit of Compensation

Multiple employees can be included on one letter with separate justifications.

### Other suggested items to include:

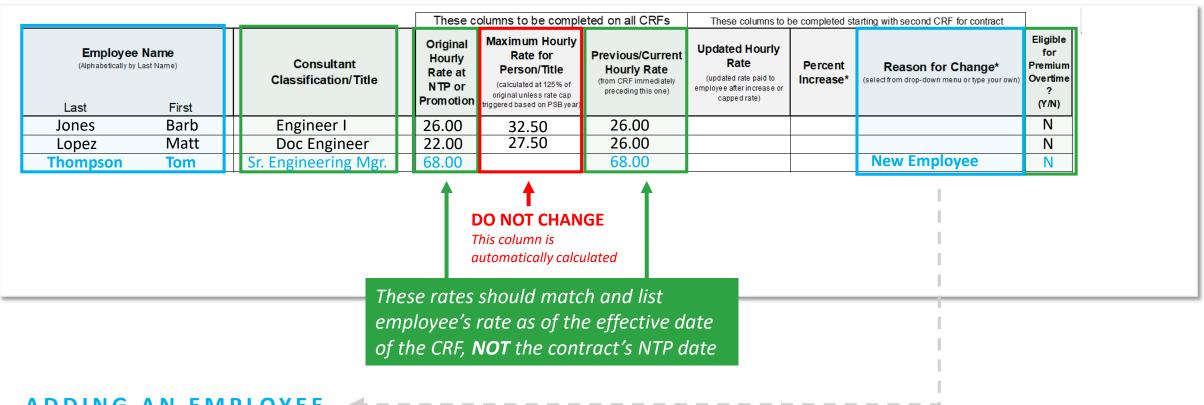
- Was this individual listed as a key personnel?
- Has this individual been charging to this contract? If yes, at what rate/capacity/scope of work?
- Is the individual actively working on the project? If yes, at what capacity?
- Will this individual be charging to the project moving forward at his/her updated rate?
- Does this increase adds more responsibilities to this individual in relation to the project?
- Are you still below or at approved average hourly rate for the contract?
- Provide background in their value/contribution to the contract
- Provide detailed reasons why they were promoted
- List the previous classifications and new classifications
- Any certifications or degree(s) earned for the position if applicable

# ADDING/REMOVING AN EMPLOYEE

**VIEW INSTRUCTIONAL VIDEO:** 

**FAST-FORWARD TO MINUTE 1:10** 

## HOW TO ADD AN EMPLOYEE



#### ADDING AN EMPLOYEE

- List all other employees from previous CRF
- List the new employee in alphabetical order
- List "New Employee' in the Reason for Change column

## HOW TO REMOVE AN EMPLOYEE

Employe (Alphabetically b			Consultant Classification/Title	Original Hourly Rate at NTP or Promotion	Maximum Hourly Rate for Person/Title (calculated at 125% of original unless rate cap triggered based on PSB year)	Previous/Current Hourly Rate (from CRF immediately preceding this one)	Updated Hourly Rate (updated rate paid to employee after increase or capped rate)	Percent Increase*	Reason for Change* (selectfrom drop-down menu or type your own)	Eligible for Premium Overtime ? (Y/N)
OX .	Jack	Ш	Engineer I	26.00	32.50	26.00			REMOVE	N
ones	Barb	ш	Engineer I	26.00	32.50	26.00				N
Lopez	Matt	ш	Doc Engineer	22.00	27.50	26.00				N
					This column is	to to d			I	
automatically calculated										
									1	

#### REMOVING AN EMPLOYEE

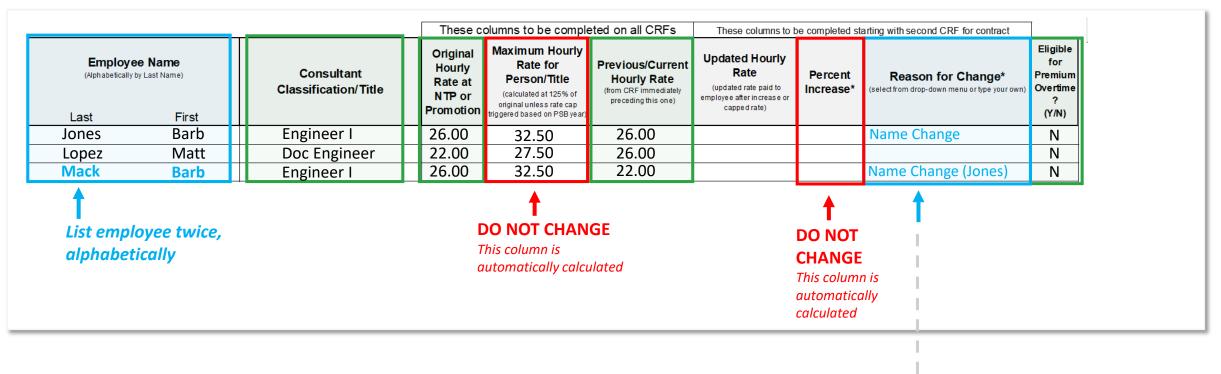
- List all other employees from previous CRF
- If removing an employee, the Original Hourly Rate, Maximum Hourly Rate and Previous/Current Hourly Rate columns must be listed at what the employee was last approved to bill at.
- In the Reason for Change Column, list 'REMOVE'.
- On the next CRF submittal, remove the employee entirely from the CRF.

## NAME CHANGES

**VIEW INSTRUCTIONAL VIDEO:** 

**FAST-FORWARD TO MINUTE 8:45** 

## DOCUMENTING AN EMPLOYEE NAME CHANGE



#### NAME CHANGE PROCESS

- List all other employees from previous CRF
- List employee twice on CRF to document name change:
  - List employee once under their previous name. In the Reason for Change column, list 'Name Change'.
  - List employee again under their new name in alphabetical order. In the Reason for Change column, list 'Name Change' with their previous last name in parenthesis.

## REVISIONS New procedure

## **NEW PROCEDURE: REVISING A PREVIOUSLY APPROVED CRF**

Contract Number: Type Of Contract (check box)  Prime Consultant Company Name: Sub-Consultant Company Name:		company Name:	List DSE or CM number  DSE □ CM □ ← Check one of these boxes  Vear of PSB: Year PSB Advertised  (Enter year Professional Services Bulletin was advertised)  List Prime Consultant or JV/Teaming Company Name									Should be dated the same date as the CRF where the error exists, followed by "REV" designation		
	Employee Name (Alphabetically by Last Name)  Last First		Consultant Classification/Title	Original Hourly Rate at NTP or	olumns to be comple  Maximum Hourly Rate for Person/Title (calculated at 125% of original unless rate cap triggered based on PSB year)	Previous/Current Hourly Rate (from CRF immediately preceding this one)	These columns to be Updated Hourly Rate (updated rate paid to employee after increase or capped rate)	Percent Increase*	arting with second CRF for contract  Reason for Change* (select from drop-down menu or type your own)	Eligible for Premium Overtime ? (Y/N)	uesignation			
	Gun	Thomas	Engineer I	30.00	37.50	30.00				Υ				
	Light	Buddy	Admin	26.00	32.50	26.00	27.00	3.8%	Raise Corrected	Υ				
	Macklin	Burt	Principal	70.00	70.00	70.00				N				
	Thompson	Tom	Sr Engineering Mgr	68.00	70.00	68.00				N				
	1						<b>†</b>		<b>†</b>					

Revised CRF should include ALL employees listed on the original CRF and note the corrected information

#### **REVISING A CRF**

- When an error is discovered on a previously approved CRF (e.g. rate listed incorrectly, raise or promotion not reported, name spelled wrong), a "revised" CRF needs to be submitted to correct the issue
- New updated instructions posted at <a href="mailto:illinoistollway.com">illinoistollway.com</a>

## IMPORTANT ITEMS OF NOTE

#### SUBMITTING A CRF TO DOCUMENT CONTROL

- The signature block should only appear on the last page and page numbers should be consecutive.
- Use the buttons at the top of the screen to add or delete rows or insert a page.
- Signatures must be signed (typed not accepted)
- Submit to Document Control at DocumentControl@getipass.com

### QUESTIONS?

For status of a submitted CRF, email DocumentControl@getipass.com

For specific questions regarding a submitted CRF, contact your assigned **Contract Expeditor**.

#### KEY REQUIREMENTS

- CRF must be submitted a minimum of 10 days prior to submitting an invoice to avoid processing and payment delays
- Names and titles of all employees working on project and billing on Direct Labor Summary of the invoice must have their
  names and titles listed exactly the same on the CRF, Direct Labor Summary, timesheets and Certified Payroll
- A CRF must be submitted for each project if running concurrently

