



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: _____

Effective Date: _____

Type Of Contract (check box) DSE CM

Year of PSB: _____

(Enter year Professional Services Bulletin was advertised)

Prime Consultant Company Name: _____

Sub-Consultant Company Name: _____

Insert Row

Delete Row

Insert Page

Employee Name <small>(Alphabetically by Last Name)</small>		Consultant Classification/Title	These columns to be completed on all CRFs			These columns to be completed starting with second CRF for contract		Eligible for Premium Overtime ? (Y/N)
			Original Hourly Rate at NTP or Promotion	Maximum Hourly Rate for Person/Title <small>(calculated at 125% of original unless rate cap triggered based on PSB year)</small>	Previous/Current Hourly Rate <small>(from CRF immediately preceding this one)</small>	Updated Hourly Rate <small>(updated rate paid to employee after increase or capped rate)</small>	Percent Increase*	
Last	First							
			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

Contract Number: _____

List DSE or CM number

Type Of Contract (check box)

DSE CM ← Check one of these boxes

Prime Consultant Company Name: _____

List Prime Consultant or JV/Teaming Company Name

Sub-Consultant Company Name: _____

List Subconsultant or Individual JV/Teaming Partner Company Name (Prime Consultants – Leave this blank)

1

Effective Date: Contract NTP Date

Year of PSB: Year PSB Advertised

(Enter year Professional Services Bulletin was advertised)

Insert Row

Delete Row

Insert Page

Employee Name <small>(Alphabetically by Last Name)</small>		Consultant Classification/Title	These columns to be completed on all CRFs			These columns to be completed starting with second CRF for contract			Eligible for Premium Overtime ? (Y/N)
			Original Hourly Rate at NTP or Promotion	Maximum Hourly Rate for Person/Title <small>(calculated at 125% of original unless rate cap triggered based on PSB year)</small>	Previous/Current Hourly Rate <small>(from CRF immediately preceding this one)</small>	Updated Hourly Rate <small>(updated rate paid to employee after increase or capped rate)</small>	Percent Increase*	Reason for Change* <small>(select from drop-down menu or type your own)</small>	
Last	First								
			0.00						
			0.00						
			0.00						
			0.00						
			0.00						
			0.00						
			0.00						
			0.00						

↑
List in alphabetical order by last name

↑
Must match classification listed on Direct Labor Summary in invoice

↑ **DO NOT CHANGE**
↑
These rates should match and be listed as the employee's rate at the date of NTP

↑ ↑ ↑
LEAVE THESE BLANK

↑
Must list Yes (Y) or No (N)

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

CONVERTING TO CRF FOR EXISTING CONTRACTS

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

Contract Number: List DSE or CM number

Type Of Contract (check box) DSE CM ← Check one of these boxes

Prime Consultant Company Name: List Prime Consultant or JV/Teaming Company Name

Sub-Consultant Company Name: List Subconsultant or Individual JV/Teaming Partner Company Name (Prime Consultants – Leave this blank)

Effective Date: Date changes occurred

Year of PSB: Year PSB Advertised
(Enter year Professional Services Bulletin was advertised)

1

Insert Row

Delete Row

Insert Page

Employee Name <small>(Alphabetically by Last Name)</small>		Consultant Classification/ Title	These columns to be completed on all CRFs			These columns to be completed starting with second CRF for contract		Eligible for Premium Overtime ? (Y/N)
Last	First		Original Hourly Rate at NTP or Promotion	Maximum Hourly Rate for Person/Title <small>(calculated at 125% of original unless rate cap triggered based on PSB year)</small>	Previous/Current Hourly Rate <small>(from CRF immediately preceding this one)</small>	Updated Hourly Rate <small>(updated rate paid to employee after increase or capped rate)</small>	Percent Increase*	
			0.00					
			0.00					
			0.00					
			0.00					

↑

- List in alphabetical order by last name
- Should include all employees listed on most recently approved WFRR/PRF/PEPC

↑

List the classification the employee was last approved to bill under

↑

DO NOT CHANGE

↑

These rates should match and be listed as the last approved rate on previously approved WFRR/PRF/PEPC

↑

DO NOT CHANGE

↑

FILL THESE OUT, IF APPLICABLE
(see later slides for more information)

↑

Must list Yes (Y) or No (N)

SECOND AND FUTURE CRFs

For new and existing contracts

VIEW INSTRUCTIONAL VIDEO:

<https://youtu.be/T3DUZQ898Mo>

SUBMITTING SECOND AND FUTURE CRFs FOR NEW AND EXISTING CONTRACTS

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

Contract Number: List DSE or CM number

Type Of Contract (check box) DSE CM ← Check one of these boxes

Prime Consultant Company Name: List Prime Consultant or JV/Teaming Company Name

Sub-Consultant Company Name: List Subconsultant or Individual JV/Teaming Partner Company Name (Prime Consultants – Leave this blank)

Effective Date: Date changes occurred

Year of PSB: Year PSB Advertised
(Enter year Professional Services Bulletin was advertised)

1

Insert Row

Delete Row

Insert Page

Employee Name <small>(Alphabetically by Last Name)</small>		Consultant Classification/ Title	These columns to be completed on all CRFs			These columns to be completed starting with second CRF for contract		Eligible for Premium Overtime ? (Y/N)
Last	First		Original Hourly Rate at NTP or Promotion	Maximum Hourly Rate for Person/Title <small>(calculated at 125% of original unless rate capped based on PSB year)</small>	Previous/Current Hourly Rate <small>(from CRF immediately preceding this one)</small>	Updated Hourly Rate <small>(updated rate paid to employee after increase or capped rate)</small>	Percent Increase*	
			0.00					
			0.00					
			0.00					
			0.00					

↑

- List in alphabetical order by last name
- Should include all employees listed on most recently approved CRF

↑

List the classification the employee was last approved to bill under

↑

These rates ONLY change with a Classification/Title Change on the previous CRF

↑

DO NOT CHANGE

↑

These rates ONLY change if a raise was given on the previous CRF

↑

DO NOT CHANGE

↑

FILL THESE OUT, IF APPLICABLE
(see later slides for more information)

↑

Must list Yes (Y) or No (N)

RAISE WITHOUT TITLE CHANGE/PROMOTION

VIEW INSTRUCTIONAL VIDEO:
FAST-FORWARD TO MINUTE 2:11

<https://youtu.be/T3DUZQ898Mo>

SUBMITTING A RAISE WITHOUT A TITLE CHANGE

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

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


DO NOT CHANGE
This column is automatically calculated

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

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




DO NOT CHANGE *List Updated Hourly Rate from previous CRF*

EMPLOYEE TITLE CHANGE/PROMOTION

VIEW INSTRUCTIONAL VIDEO:
FAST-FORWARD TO MINUTE 4:50

<https://youtu.be/T3DUZQ898Mo>

EXAMPLE: EMPLOYEE CLASSIFICATION/TITLE CHANGES

Employee Name <small>(Alphabetically by Last Name)</small>		Consultant Classification/Title	These columns to be completed on all CRFs			These columns to be completed starting with second CRF for contract		Eligible for Premium Overtime? (Y/N)	
			Original Hourly Rate at NTP or Promotion	Maximum Hourly Rate for Person/Title <small>(calculated at 125% of original unless rate cap triggered based on PSB year)</small>	Previous/Current Hourly Rate <small>(from CRF immediately preceding this one)</small>	Updated Hourly Rate <small>(updated rate paid to employee after increase or capped rate)</small>	Percent Increase*		Reason for Change* <small>(select from drop-down menu or type your own)</small>
Last	First	Engineer I	26.00	32.50	26.00	28.00	7.7%	Promotion - Title Change	N
Box	Jack	Engineer II	28.00	35.00	28.00			New Title (new range)	N

DO NOT CHANGE
This column is automatically calculated

DO NOT CHANGE
This column is automatically calculated

Promotions and cumulative rate increases of 7% or greater within a rolling 12-month period require a Justification Letter

These three rates should match the new Updated Hourly Rate

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

<https://youtu.be/T3DUZQ898Mo>

HOW TO ADD AN EMPLOYEE

Employee Name <small>(Alphabetically by Last Name)</small>		Consultant Classification/Title	These columns to be completed on all CRFs			These columns to be completed starting with second CRF for contract		Eligible for Premium Overtime? (Y/N)
			Original Hourly Rate at NTP or Promotion	Maximum Hourly Rate for Person/Title <small>(calculated at 125% of original unless rate cap triggered based on PSB year)</small>	Previous/Current Hourly Rate <small>(from CRF immediately preceding this one)</small>	Updated Hourly Rate <small>(updated rate paid to employee after increase or capped rate)</small>	Percent Increase*	
Last	First							
Jones	Barb	Engineer I	26.00	32.50	26.00			N
Lopez	Matt	Doc Engineer	22.00	27.50	26.00			N
Thompson	Tom	Sr. Engineering Mgr.	68.00		68.00		New Employee	N

DO NOT CHANGE

This column is automatically calculated

These rates should match and list employee's rate as of the effective date of the CRF, NOT the contract's NTP date

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

Employee Name <small>(Alphabetically by Last Name)</small>		Consultant Classification/Title	These columns to be completed on all CRFs			These columns to be completed starting with second CRF for contract		Eligible for Premium Overtime? (Y/N)
			Original Hourly Rate at NTP or Promotion	Maximum Hourly Rate for Person/Title <small>(calculated at 125% of original unless rate cap triggered based on PSB year)</small>	Previous/Current Hourly Rate <small>(from CRF immediately preceding this one)</small>	Updated Hourly Rate <small>(updated rate paid to employee after increase or capped rate)</small>	Percent Increase*	
Last	First							
Box	Jack	Engineer I	26.00	32.50	26.00		REMOVE	N
Jones	Barb	Engineer I	26.00	32.50	26.00			N
Lopez	Matt	Doc Engineer	22.00	27.50	26.00			N

DO NOT CHANGE

This column is automatically calculated

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

<https://youtu.be/T3DUZQ898Mo>

DOCUMENTING AN EMPLOYEE NAME CHANGE

Employee Name <small>(Alphabetically by Last Name)</small>		Consultant Classification/Title	These columns to be completed on all CRFs			These columns to be completed starting with second CRF for contract		Eligible for Premium Overtime? (Y/N)
			Original Hourly Rate at NTP or Promotion	Maximum Hourly Rate for Person/Title <small>(calculated at 125% of original unless rate cap triggered based on PSB year)</small>	Previous/Current Hourly Rate <small>(from CRF immediately preceding this one)</small>	Updated Hourly Rate <small>(updated rate paid to employee after increase or capped rate)</small>	Percent Increase*	
Last	First							
Jones	Barb	Engineer I	26.00	32.50	26.00		Name Change	N
Lopez	Matt	Doc Engineer	22.00	27.50	26.00			N
Mack	Barb	Engineer I	26.00	32.50	22.00		Name Change (Jones)	N

↑
List employee twice, alphabetically

↑
DO NOT CHANGE
This column is automatically calculated

↑
DO NOT CHANGE
This column is automatically calculated

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: _____ List DSE or CM number _____ Effective Date: **9/19/2019 REV** ←

Type Of Contract (check box) DSE CM ← Check one of these boxes Year of PSB: Year PSB Advertised
(Enter year Professional Services Bulletin was advertised)

Prime Consultant Company Name: _____ List Prime Consultant or JV/Teaming Company Name _____

Sub-Consultant Company Name: _____ List Subconsultant or Individual JV/Teaming Partner Company Name (Prime Consultants – Leave this blank) _____

Should be dated the same date as the CRF where the error exists, followed by "REV" designation

Employee Name <small>(Alphabetically by Last Name)</small>		Consultant Classification/Title	These columns to be completed on all CRFs			These columns to be completed starting with second CRF for contract		Eligible for Premium Overtime? (Y/N)	
			Original Hourly Rate at NTP or Promotion	Maximum Hourly Rate for Person/Title <small>(calculated at 125% of original unless rate cap triggered based on PSB year)</small>	Previous/Current Hourly Rate <small>(from CRF immediately preceding this one)</small>	Updated Hourly Rate <small>(updated rate paid to employee after increase or capped rate)</small>	Percent Increase*		Reason for Change* <small>(select from drop-down menu or type your own)</small>
Last	First								
Gun	Thomas	Engineer I	30.00	37.50	30.00			Y	
Light	Buddy	Admin	26.00	32.50	26.00	27.00	3.8%	Raise Corrected	Y
Macklin	Burt	Principal	70.00	70.00	70.00			N	
Thompson	Tom	Sr Engineering Mgr	68.00	70.00	68.00			N	

↑ ↑ ↑

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 illinoistollway.com

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

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

QUESTIONS?

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

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



THANK YOU