

Consultant Rate Form (CRF) Instructions for Consultant

Frequently Asked Questions

Revisions from previous instructions in red

- CRF replaces **all** Payroll forms previously used by the Tollway (WFRR [Work Force and Rate Revisions], PRF [Payroll Rate Form], PEPC [Project Employee Payroll Change]) for professional services invoices.
- CRF will fulfill the Certified Payroll requirement for the Tollway. Consultants may be required to submit additional information, if requested.
- CRF **must** be sent to Document Control (DocumentControl@getipass.com) and **not** to Accounts Payable as previous forms have been.
- New Contract's initial CRF form must have an effective date of the NTP (Notice to Proceed) of the Contract. If a subconsultant is added to the contract by Reallocation, the effective date of their first CRF should correspond to the effective date of the Reallocation.
- For current contracts with approved PEPC/PRF/WFRR: Submit a CRF only when there has been a change that affects the currently approved PEPC/PRF/WFRR on file. Consultants do not need to submit a new CRF to replace the current form on file until there is a change to the workforce for the Contract.
- Any employee with a total wage increase of 7% or greater in a running 12-month period will need to submit a detailed justification letter that will be reviewed by the Deputy Chief. See pages 9-10 for letter requirements.
- All Contract CRFs must be submitted a minimum of 10 days prior to submitting an invoice to avoid processing and payment delays.
- Contracts with a multiplier of 2.5 and 2.8 must submit a CRF for each multiplier. If two multipliers, put the multiplier that applies to the CRF in parenthesis next to the Contract Number.
- If errors are discovered, the CRF will need to be corrected before it can be routed for approval.
- The year of the PSB (Professional Services Bulletin) determines the hourly rate cap. Contracts from PSB year 2017 and prior, the hourly rate cap is \$70.00. Hourly rate caps established in the original contract apply.
 - *If your Contract is 2017 and prior and you have employees that have been previously approved for a rate above the cap, please contact Document Control.
- If your firm has more than one Tollway project running concurrently, a CRF must be submitted for each project.
- The latest version of the CRF is always available on the Tollway website, so ensure you are using the most current form prior to submitting.
- Macros **must** be enabled in Microsoft Excel for the CRF to work properly.

Only need to submit a CRF if:

- New Contract
- New Contract Employee
- Promotion of Contract Employee that results in a new classification
- Salary increase of Contract Employee is above the 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 (for example, last name changed due to marital status)

Initial Consultant Rate Form (CRF) for New Contracts starting with CRF

1. Effective date of initial CRF must be dated with the NTP date of the Contract. For Upon Request contracts, use the NTP of the overall contract, not individual Task Order NTPs.
2. Enter the Year of PSB (Professional Services Bulletin).
For example, if the Contract was advertised on PSB 17-1, the year is listed as 2017. Advertised on PSB 18-1, the year is listed as 2018.
3. Contract Number: Insert the DSE (Design Section Engineer) or CM (Construction Manager) Tollway Contract Number, do not insert task numbers.
4. Type of Contract: Select the type of Contract of the CRF by checking one box, either DSE or CM.
5. Prime Consultant Company Name: Insert the name of the Prime Consultant Company.
6. Subconsultant Company Name: Insert your company name here. Prime Consultants leave this line blank.
7. Last Name, First Name, Middle Initial (if applicable) are listed alphabetically by last name, Consultant Classification/Title, Original Hourly Rate at NTP or Promotion, Previous/Current Hourly Rate and Eligible for Premium Overtime columns must all be filled out. Nicknames are not to be used.
8. All employees working on the project and billing on the Direct Labor Summary of the invoice must have their names and titles listed the exact same on the CRF, Direct Labor Summary, timesheets submitted, and Certified Payroll (if requested).
9. Columns to be left blank on the Initial CRF: Updated Hourly Rate, Percent Increase, & Reason for Change.
10. The Original Hourly Rate and Previous/Current Hourly Rate columns need to be filled out with what the employee is being currently paid at the date of NTP. These rates should match for the initial CRF. Certified Payroll may be requested to confirm if necessary.

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 1829)</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							
Beard	Brad	Project Manager	70.00	87.50	70.00			N
Box	Jack	Engineer I	26.00	32.50	26.00			N
Boy	Thomas	Doc Engineer	22.00	27.50	22.00			Y
			---	---	---			..

11. The Maximum Hourly Rate column calculates automatically at 125% of the Original Hourly Rate at NTP. This is a locked column, do not change.
12. Eligible for Premium Overtime column needs to be filled out with either YES or NO for each employee. If there was a change to which employees are eligible, a letter of justification will be required with the submittal of the CRF. A blank cell is not acceptable.
13. 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. Macros must be enabled.
14. The Consultant Representative section at the bottom of the CRF must be filled out completely and signed. Typed signatures are not accepted. This is who will be contacted if there are any issues with the CRF and who is authorized to receive a PDF signed copy of your approved CRF. Include an email and phone number where the Consultant Representative can be reached.
15. All CRFs must be submitted to Document Control (DocumentControl@getipass.com).

To avoid delay in invoice processing and payments, ensure the CRF is submitted a minimum of 10 days prior to any invoice it will affect.

Conversion from WFRR/PRF/PEPC to CRF

1. Effective date of conversion CRF must correspond with the date the changes occurred.
 For example: Jim Shoe received an increase on July 1st, the Effective Date will be listed as 7/1/2019.
 Jane Doe was added to the Contract on August 21st, the Effective Date will be listed as 8/21/2019.
2. Enter the Year of PSB (Professional Services Bulletin).
 For example, if the Contract was advertised on PSB 17-1, the year is listed as 2017. Advertised on PSB 18-1, the year is listed as 2018. The cell is RED until the year is entered.
3. Contract Number: Insert the DSE (Design Section Engineer) or CM (Construction Manager) Tollway Contract Number, do not insert task numbers.
4. Type of Contract: Select the type of Contract of the CRF by checking one box, either DSE or CM.
5. Prime Consultant Company Name: Insert the name of the Prime Consultant Company.
6. Subconsultant Company Name: Insert your company name here. Prime Consultants leave this line blank.
7. The entire top of the form needs to be filled out before adding any employee names.
8. Last Name, First Name, Middle Initial (if applicable) are listed alphabetically by last name, Consultant Classification/Title, Original Hourly Rate at NTP or Promotion, Previous/Current Hourly Rate, and Eligible for Premium Overtime columns must all be filled out. Nicknames are not to be used.
9. Make sure all employees that will be working on the project and billing on the Direct Labor Summary of the invoice have their names and titles listed the exact same on the CRF. The name listed on the CRF, Direct Labor Summary, Timesheets submitted, and Certified Payroll must match exactly.
10. When submitting the CRF form to reflect hourly rate changes and/or additions in staff, **all employees presently listed on the most recently approved WFRR/PRF/PEPC to the project need to be listed**, not just those individuals affected by the changes.
11. Unless there is a change on an employee from the approved WFRR/PRF/PEPC on file, the following columns are to be left blank on the conversion CRF: Updated Hourly Rate, Percent Increase and Reason for Change.
12. The Consultant Classification/Title column needs to list the Consultant Classification the employee was last approved to bill under. If this has changed, the employee must be listed twice documenting the change. Once with the classification that the employee was last approved to bill under, and on the next line with the employee's new classification (and new range if they also received a pay increase).

If the employee also received a pay increase, the rate listed in the Updated Hourly Rate column will then be the rate listed in the Original Hourly Rate column for the new classification. This will give the employee a new Maximum Hourly Rate for their classification.

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? <small>(Y/N)</small>
			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								
Beard	Brad	Project Manager	70.00	87.50	70.00				N
Box	Jack	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
Boy	Thomas	Doc. Engineer	22.00	27.50	22.00				Y

13. The rate listed under the Original Hourly Rate and Previous/Current Hourly Rate columns must match for each employee and needs to be the rate from the most recently approved WFRR/PEPC.

If converting from a PRF, the rate listed in the Original Hourly Rate and Previous/Current Hourly Rate columns needs to be what the employee is currently being paid but not above the max rate range for the individual as shown on the last approved PRF. All Contracts selected from PSBs advertised in 2017 or earlier have a \$70 rate cap for all employees. Certified Payroll may be requested to confirm rates if necessary.

Employee Name (Alphabetically by Last Name)		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							
Beard	Brad	Project Manager	70.00	87.50	70.00			N
Box	Jack	Engineer I	26.00	32.50	26.00			N
Boy	Thomas	Doc Engineer	22.00	27.50	22.00			Y

14. If any employee received a raise that is listed in the Updated Hourly Rate column, there needs to be a reason listed in the Reason for Change column.
15. Any raise that results in the employee’s rate being increased 7% or greater in a running 12-month period needs to be listed in the Updated Hourly Rate column. CRFs that show increases less than 7% over a running 12-month period are not required.

For example, if the employee receives a raise of 3% in January (which does not necessitate the submittal of a new CRF) and then receives a raise of 5% in October, a CRF would have to be submitted with the October date showing 8% increase since it was within a running 12-month period.

Employee Name (Alphabetically by Last Name)		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							
Gun	Thomas	Engineer I	30.00	37.50	30.00			Y
Light	Buddy	Admin	26.00	32.50	26.00	29.00	11.5%	Raise
Macklin	Burt	Principal	70.00	70.00	70.00			N

16. If the raise given is 7% or greater or the total increase over a running 12-month period has exceeded 7%, there needs to be a letter that explains which employee received a raise, how much they received over a running 12-month period and an explanation of why the employee received the raise(s). If multiple employees received a raise 7% or greater, you may submit one letter, but all employees need to be listed and each need a detailed reason.

If an employee received a raise of over 7% during a running 12-month period and it was documented on a CRF, and the employee receives another raise of **any** amount during the running 12-month period following the raise, the raise needs to be documented on a CRF and a letter must be submitted explaining the multiple raises.

17. The “Maximum Hourly Rate for Person/Title” column calculates automatically based off the PSB year and what is listed in the “Original Hourly Rate at NTP or Promotion.” This is a locked column, do not change.
18. Anytime an employee receives a raise that puts their Current Hourly Rate over their Maximum Hourly Rate, it will require a letter of explanation why the rate for this employee has exceeded the maximum hourly rate without the employee receiving a promotion. A letter will be required each time the particular employee receives an increase above the maximum hourly rate without receiving a promotion.

Employee Name (Alphabetically by Last Name)		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 (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)	
Last	First								
Beard	Brad	Project Manager	70.00	87.50	70.00				N
Box	Jack	Engineer I	26.00	32.50	31.50	33.00	4.8%	Raise - See attached	N
Boy	Thomas	Doc Engineer	22.00	27.50	22.00				Y
Doe	John	Engineer II	35.00	43.75	35.00				N

- Eligible for Premium Overtime column needs to be filled out with either YES or NO for each employee. If there was a change to which employees are eligible, a letter of justification will be required with the submittal of the CRF. A blank cell is not acceptable for any employee.
- If removing an employee, the Original Hourly Rate, Maximum Hourly Rate and Previous/Current Hourly Rate columns all need to be filled out with what the employee was last approved to bill at. In the Reason for Change Column, please list REMOVE. Then on the next CRF submittal, remove the employee entirely off the CRF.

Employee Name (Alphabetically by Last Name)		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 Premium Overtime? (Y/N)
Beard	Brad	Project Manager	70.00	87.50	70.00				N
Box	Jack	Engineer I	26.00	32.50	26.00			REMOVE	N
Boy	Thomas	Doc Engineer	22.00	27.50	22.00				Y

- When a name change occurs, the employee will need to be listed twice on the CRF documenting the name change. Once with the previous name and in the Reason for Change column, please list Name Change. Then list the employee again with the new name, alphabetically, and in the Reason for Change column, list Name Change (Previously) and list the employee's previous last name in the parenthesis.
- The signature block should only appear on the last page and page numbers should be consecutive. Please use the buttons at the top of the screen to add or delete rows or insert a page.
- The Consultant Representative section at the bottom of the CRF must be filled out completely and signed. Typed signatures are not acceptable. This is who will be contacted if there are any issues with the CRF and who is authorized to receive a PDF signed copy of your approved CRF. Include an email and phone number where the Consultant Representative can be reached.
- All CRFs must be submitted to Document Control (DocumentControl@getipass.com).

- If converting from a PRF or Exhibit C-3, you do not need to send in a CRF if an employee received a raise that is below the range the employee fits into on the PRF or Exhibit C-3 but will need to submit for all other reasons (new employee, removed employee, new classification, raise above the classification max).

To avoid delay in invoice processing and payments, ensure the CRF is submitted a minimum of 10 days prior to any invoice it will affect.

Second and all future dated CRFs on the Contract

1. The effective date on the submitted CRF needs to correspond with the date the change occurred.
For example: Jim Shoe received a promotion on July 1st, the Effective Date will be listed as 7/1/2019.
Jane Doe was added to the Contract on August 21st, the Effective Date will be listed as 8/21/2019.
2. Need to enter the Year of PSB (Professional Services Bulletin).
For example, if the Contract was advertised on PSB 17-1, the year is listed as 2017. Advertised on PSB 18-1, the year is listed as 2018. The cell is RED until the year is entered.
3. Contract Number: Insert the DSE or CM Tollway Contract Number, do not insert task numbers.
4. Type of Contract: Select the type of Contract of the CRF by checking one box, either DSE or CM.
5. Prime Consultant Company Name: Insert the name of the Prime Consultant Company.
6. Subconsultant Company Name: Insert your company name here. Prime Consultants leave this line blank.
7. The entire top of the form needs to be filled out before adding any employee names.
8. All employees listed on the previous CRF must be listed on the submitted CRF. Unless they were designated as “Remove from Contract” or similar on the previous CRF.
9. Employee titles must be the same as the previous CRF. If this has changed, the employee must be listed twice documenting the change. Once with the classification that the employee was last approved to bill under, and on the next line with the employee’s new classification (and new range if they also received a pay increase).

If the employee also received a pay increase, the rate listed in the Updated Hourly Rate column will then be the rate listed in the Original Hourly Rate column for the new classification. This will give the employee a new Maximum Hourly Rate for their classification.

Employee Name (Alphabetically by Last Name)		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								
Beard	Brad	Project Manager	70.00	87.50	70.00				N
Box	Jack	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
Boy	Thomas	Doc Engineer	22.00	27.50	22.00				Y

10. Column “Original Hourly Rate at NTP or Promotion” needs to be the same as previous CRF. This column does not change for an employee unless they received a Promotion which gives them a new rate range (see example above). If the employee received a raise on the previous CRF, the new rate will be listed in the Previous/Current Hourly Rate and the Original Hourly Rate column will not change and still list the Original Rate. (see below)

Employee Name (Alphabetically by Last Name)		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								
Beard	Brad	Project Manager	70.00	87.50	70.00				N
Box	Jack	Engineer I	26.00	32.50	26.00				N
Boy	Thomas	Doc Engineer	22.00	27.50	22.00	23.00	4.5%	Raise	Y
Doe	John	Engineer II	35.00	43.75	35.00				N
Friend	Jane	Admin	19.00	23.75	19.00				Y

Employee Name (Alphabetically by Last Name)		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								
Beard	Brad	Project Manager	70.00	87.50	70.00			N	
Box	Jack	Engineer I	26.00	32.50	26.00			N	
Boy	Thomas	Doc Engineer	22.00	27.50	23.00			Y	
Doe	John	Engineer II	35.00	43.75	35.00			N	

- The "Maximum Hourly Rate for Person/Title" column calculates automatically based off the PSB year and what is listed in the "Original Hourly Rate at NTP or Promotion." This is a locked column, do not modify.
- Anytime an employee receives a raise that put's their Current Hourly Rate over their Maximum Hourly Rate, it will require a letter of explanation why the rate for this employee has exceeded the maximum hourly rate without the employee receiving a promotion. A letter will be required each time the particular employee receives an increase without receiving a promotion.

Employee Name (Alphabetically by Last Name)		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								
Beard	Brad	Project Manager	70.00	87.50	70.00			N	
Box	Jack	Engineer I	26.00	32.50	31.50	33.00	4.8%	Raise - See attached	
Boy	Thomas	Doc Engineer	22.00	27.50	22.00			Y	
Doe	John	Engineer II	35.00	43.75	35.00			N	

- The "Previous/Current Hourly Rate" column needs to be filled out for all employees with the rate that was listed on the previously approved CRF. If the employee is added as New on the CRF, the rate listed in the "Original Hourly Rate" and "Previous/Current Hourly Rate" columns need to match.

Employee Name (Alphabetically by Last Name)		Consultant Classification/Title	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>	Eligible for Premium Overtime? (Y/N)
Gun	Thomas	Engineer I	30.00	37.50	30.00			Y	
Light	Buddy	Admin	26.00	32.50	26.00			New Employee	
Macklin	Burt	Principal	70.00	70.00	70.00			N	

- If the rate listed in the "Previous/Current Hourly Rate" is not current from the last approved CRF, fill out the Updated Hourly Rate column with the employee's actual hourly pay rate on the Contract. Only rate changes of 7% or greater in a 12-month period needs to be shown in Updated Hourly Rate column unless they have already received an increase of 7% or greater over the same 12-month period. Certified Payroll may be requested to confirm if necessary.
- If any employee received a raise that is listed in the Updated Hourly Rate column, there needs to be a reason listed in the Reason for Change column. Any raise that results in the employee's rate being increased 7% or greater in a 12-month period needs to be listed in the Updated Hourly Rate column.

For example, if the employee receives a raise of 3% in January (which does not necessitate the submittal of a new CRF) and then receives a raise of 5% in October, a CRF would have to be submitted with the October date showing 8% increase since it was within a 12-month period.

Employee Name (Alphabetically by Last Name)		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	29.00	11.5%	Raise	
Macklin	Burt	Principal	70.00	70.00	70.00			N	

16. If the Updated Hourly Rate column is different from the Previous/Current Hourly Rate, there needs to be a percentage listed in the Percent Increase column. This will be a locked column that is calculated automatically, please do not modify.

$$\text{Percent Change} = \frac{\text{Updated Hourly Rate} - \text{Previous/Current Hourly Rate}}{\text{Previous/Current Hourly Rate}}$$

17. If any employee has a raise listed on the CRF, there needs to be a reason listed in the Reason for Change column. If the raise given is 7% or greater or the total increase over a 12-month period has exceeded 7%, there needs to be a letter that explains which employee received a raise, how much they received over a 12-month period and an explanation of why the employee received the raise. If multiple employees received a raise 7% or greater, you may submit one letter, but all employees need to be listed and each need a detailed reason.

If an employee received a raise of over 7% during a 12-month period and it was documented on a CRF, and then the employee receives another raise of any amount during the 12-month period following the raise, it will need to be documented on a CRF and a letter must be submitted explaining the raises.

18. Eligible for Premium Overtime needs to be filled out with either YES or NO for each employee. If there was a change to which employees are eligible, a letter of justification will be required with the submittal of the CRF. This cannot be left blank for any employee.

19. If removing an employee, the Original Hourly Rate, Maximum Hourly Rate and Previous/Current Hourly Rate columns all need to be filled out with what the employee was last approved to bill at. In the Reason for Change Column, please list REMOVE. Then on the next CRF submittal, remove the employee entirely off the CRF.

Employee Name (Alphabetically by Last Name)		Consultant Classification/Title	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 ^a	Reason for Change ^a <small>(select from drop-down menu or type your own)</small>	Eligible for Premium Overtime? (Y/N)
Last	First								
Beard	Brad	Project Manager	70.00	87.50	70.00				N
Box	Jack	Engineer I	26.00	32.50	26.00		REMOVE		N
Boy	Thomas	Doc Engineer	22.00	27.50	22.00				Y

20. When a name change occurs, the employee will need to be listed twice on the CRF documenting the name change. Once with the previous name and in the Reason for Change column, please list Name Change. Then list the employee again with the new name, alphabetically, and in the Reason for Change column, list Name Change (Previously) and list the employee’s previous last name in the parenthesis.

21. The signature block should only appear on the last page and page numbers should be consecutive. Please use the buttons at the top of the screen to add or delete rows or insert a page.

22. The Consultant Representative section at the bottom of the CRF must be filled out completely and signed. Typed signatures are not accepted. This is who will be contacted if there are any issues with the CRF and who is authorized to receive a PDF signed copy of your approved CRF. Include an email and phone number where the Consultant Representative can be reached.

23. When submitting a CRF form to reflect hourly rate changes and/or additions in staff, **all employees presently assigned to the project need to be listed**, not just those individuals affected by the changes.

24. All CRFs must be submitted to Document Control (DocumentControl@getipass.com).

To avoid delay in invoice processing and payments, ensure the CRF is submitted a minimum of 10 days prior to any invoice it will affect.

Justification Letters

Below are the minimum detail requirements for justification letters submitted with a CRF:

If one raise was given to an employee that is 7% or greater:

- List Updated Hourly Rate amount and Percentage Increase for each employee.
- Provide a detailed explanation of why the employee received a rate increase of 7% or greater. For reference - the larger the increase, the more detailed explanation should be provided. Note: If multiple employees received a rate increase of 7% or greater, separate justifications are required for each employee, but all may be included in a single letter.
- Confirm if raises given will impact the Upper Limit of Compensation (ULC) of the contract.

If multiple raises were given to an employee in the running twelve-month period that resulted in a cumulative increase of 7% or greater:

- List effective date(s) of the raise(s), Updated Hourly Rate amount, and cumulative Percentage Increase for each employee in the running twelve-month period.
- Provide a detailed explanation why the employee received multiple raises that resulted in a cumulative rate increase of 7% or greater. For reference - the larger the increase, the more detailed explanation should be provided. Note: If multiple employees received a rate increase of 7% or greater, separate justifications are required for each employee, but all may be included in a single letter.
- Confirm if raises given will impact the Upper Limit of Compensation (ULC) of the contract.

If an employee receives a raise that exceeds the Maximum Hourly Rate:

- List the name of the employee who received the raise.
- Provide an explanation of why the employee received a rate increase that exceeds the Maximum Hourly Rate.
- Confirm if raises given will impact the Upper Limit of Compensation (ULC) of the contract.
Note: If the raise given is less than 7%, but still exceeds the Max Hourly Rate, a letter is still required.

Below are questions and details to consider when writing a detailed explanation of an employee's raise:

1. Was the employee listed as key personnel?
2. Has this employee been charging to this contract? If yes, at what rate/capacity/scope of work?
3. Is the employee actively working on the project? If yes, at what capacity?
4. Why was the hourly rate increase (7% and greater) given?
5. Will this employee be charging to the project moving forward at his/her updated rate?
6. Will the employee be tasked with additional responsibilities on the project because of the raise?
7. Is your project still below or at the approved average hourly rate?
8. Provide detail on the employee's contributions to the project.
9. Provide detailed reasons why the employee was promoted.
10. List the employee's previous classification and new classification.
11. List any certification(s) or degree(s) earned for the position, if applicable.

Other CRF changes that require a justification letter include:

Premium Overtime status changes:

- List the name of the employee whose premium overtime status changed.
- Provide an explanation of why the employee's premium overtime status changed.
- Confirm if the overtime status change will impact the Upper Limit of Compensation (ULC) of the contract.

Hourly Rate decreases:

- List the name of the employee whose hourly rate decreased.
- Provide an explanation of why the employee's hourly rate decreased.
- Confirm if the hourly rate decrease will impact the Upper Limit of Compensation (ULC) of the contract.

Revised CRFs

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.

1. The Effective Date listed on the “revised” CRF should be the same as the original CRF where the error exists, followed by the “REV” designation.

Effective Date: 9/1/2019 REV
 Year of PSB: 2018
(Enter year Professional Services Bulletin was advertised)

2. The revised CRF should include **ALL** employees listed on the original CRF and note the corrected information. The “revised” CRF will be compared to the original CRF by the Tollway staff during review.

Revision

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 Premiu m Overtim e? <small>(Y/N)</small>
			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			New Employee	N
				0.00					
				0.00					
				0.00					

Original

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 Premiu m Overtim e? <small>(Y/N)</small>
			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	27.20	4.6%	Raise	Y
Macklin	Burt	Principal	70.00	70.00	70.00				N
Thompson	Tom	Sr. Engineering Mgr	68.00	70.00	68.00			New Employee	N
				0.00					
				0.00					
				0.00					

Acronyms

CRF: Consultant Rate Form

PEPC: Project Employee Payroll Change - form

PRF: Payroll Rate Form

WFRR: Work Force Rate Revision

PSB: Professional Services Bulletin

DSE: Design Section Engineer

CM: Construction Manager