

## What is the ePCR system?

The ePCR system (System) enables Contractors and Caltrans to easily communicate electronically and track the status of a potential claim record using Adobe Forms PDF's. The forms are connected to a database that manages the process workflow and provides users with email notifications and reminders.

## How does it work?

User Account: The System uses the same account username that is used for iEWB, therefore most users already have an account. If you don't have an account in iEWB, please follow the instructions for creating an account found at <http://www.dot.ca.gov/hq/construc/iewb/>. To have your username assigned a role and contract in the System please make sure forms CEM 4904 (Caltrans) and CEM 4905 (Contractor) have been submitted and processed. Once you have an account and have been assigned a contract in iEWB, you will be able to access the System for the assigned contract.

**Please Note: ePCR uses the same user account as iEWB but a different password. Please refer to page #2 step #4 to #10 for how to get a temporary password and reset/change Password**

Download the Initial Form: Contractors will download the Initial Potential Claim Record form (CEM-6201D), which is part of the System, from the website ([Electronic Potential Claim Record \(ePCR\) System | Caltrans](#)).

Submit initial Form (CEM-6201D): Once the form is downloaded and completed the user can submit the form by selecting the submit button found at the top of the form. All System forms allow attachments.

Workflow and Notifications (CEM-6201D): Once the initial form is submitted, the RE will be notified via email that a PCR form has been submitted for review and the form will be attached to the email. A confirmation email is also sent to the originator of the form with the following forms attached:

1. Submitted form
2. Supplemental Potential Claim Record (sPCR)
3. PCR closure form.

*Note: The System will keep track of the date when the forms are submitted and automatically provide reminders to the RE to provide a response to the PCR. There is also an automatic reminder for the contractor to submit the Supplemental Potential Claim (CEM-6201E) and the Full and Final Potential Claim Record forms (CEM-6201F).*

RE reviews the PCR: Once the RE receives the submitted form via email he/she reviews it and provides a response on the form and selects either "Approve", "No Merit", or "Partial Merit."

*Workflow and Notifications (CEM-6201D):* Once the RE has reviewed and responded on the form the Contractor will receive an email with the RE’s comments and status of the PCR. Reminders for the contractor are still active until either the sPCR is submitted or the PCR closure form is submitted.

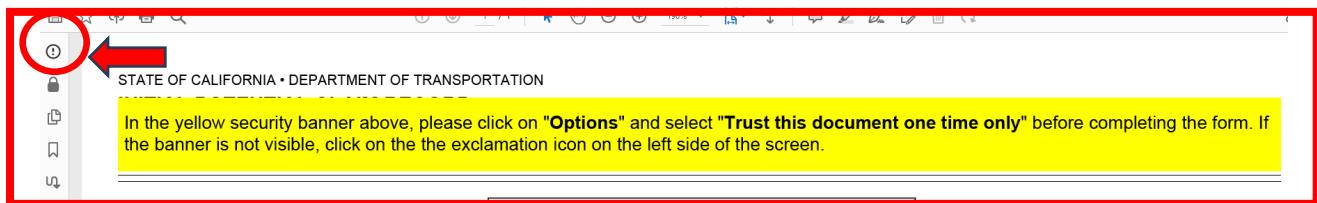
*Note: The body of the emails generated by the system also contain the position of the RE.*

The same type of workflow and notifications are generated for all the forms used in the System.

**How do I access the System and how do I submit my Potential Claim Records (PCRs)?**

Below is a quick reference guide on how to submit the first form for the first time in the ePCR system. If you have already registered, you will only need to log into the form using your credentials:

1. Before you start using the System, the CEM 4904 and CEM 4905 need to be processed so the user(s) can be assigned to the contract.
2. Download the form CEM-6201D as mentioned before
3. Open the CEM-6201D form in an Adobe application, go to options and select the “Trust this document one time only”. If the security banner is not visible follow the instructions at the top of the form. (Click “!” or “Yellow banner” first, then you will be able to click “Option”)



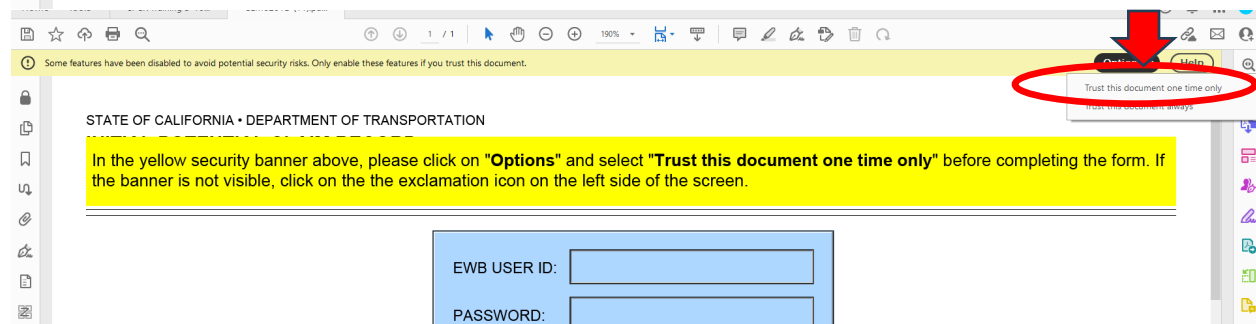
EWB USER ID:

PASSWORD:

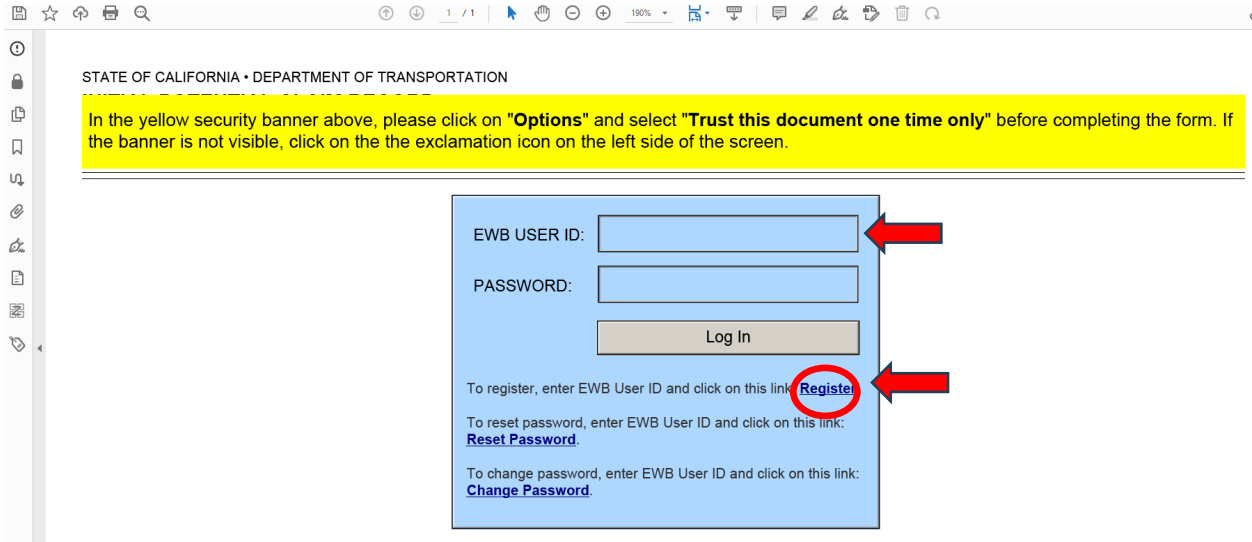
To register, enter EWB User ID and click on this link: [Register](#).

To reset password, enter EWB User ID and click on this link: [Reset Password](#).

To change password, enter EWB User ID and click on this link: [Change Password](#).



4. Enter your iEWB username in the EWB USER ID field.
5. Select the Register link below

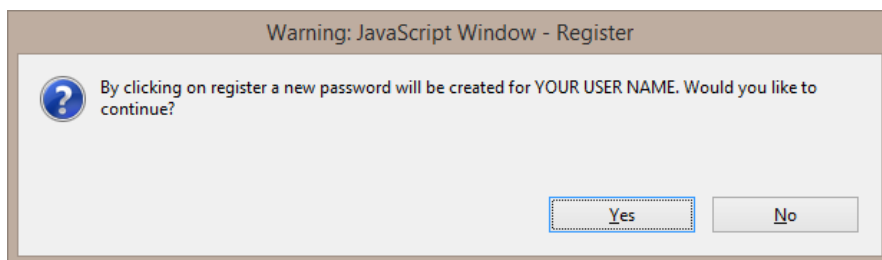


**Note:** ePCR uses the same User ID as iEWB but a different password. Please click Register to get a temporary password via e-mail. Once the user gets the e-mail, use the temporary password to log in.

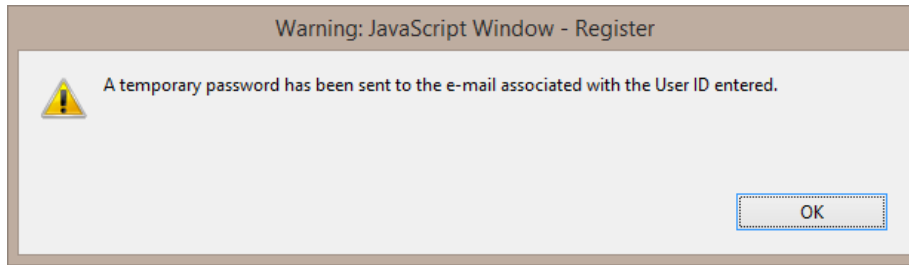
**If you want to reset or change your password:**

1. If this is your first time using the System, first log in with the temporary password and close the file
2. Re-open the file
3. Click Reset Password if you need to reset it (typically if you forget your password) or Change Password if you know your password and would like to change it.

6. Next you will be asked to register, click Yes to continue:



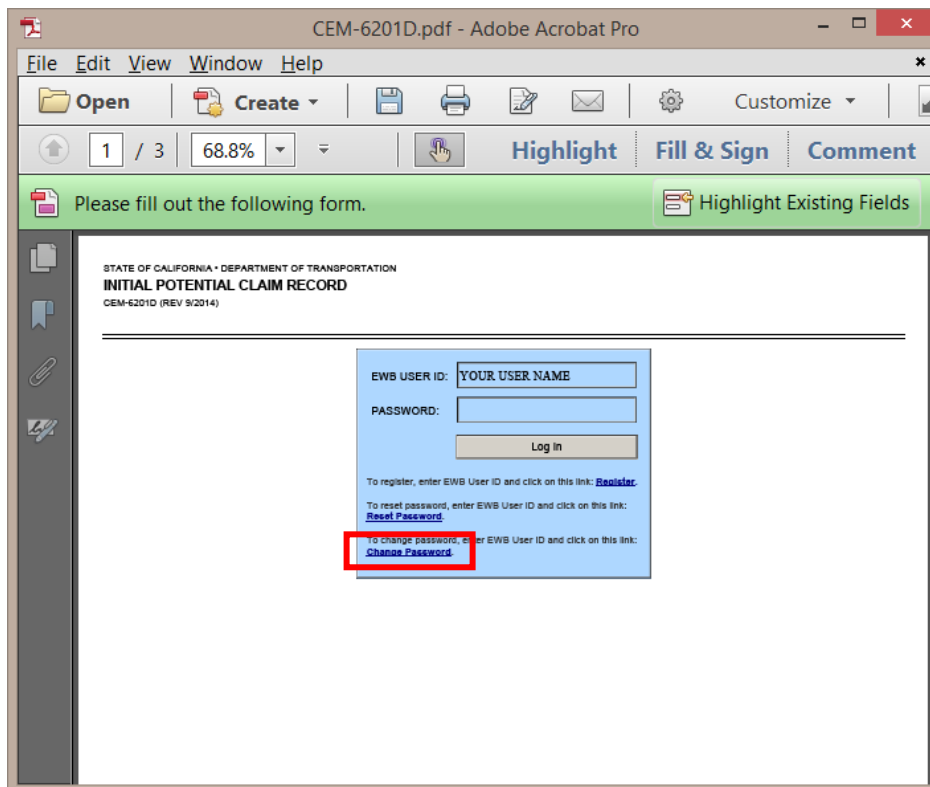
7. A temporary password will be sent to the email you have registered in the iEWB system. If there are any issues with your account in the iEWB system please contact your District iEWB Administrator (<https://dot.ca.gov/programs/construction/iewb/iewb-district-admin-list>).



8. Next go to your email (this is the email that is associated with your iEWB account) and copy/paste the temporary password to the form you have open. Click the "Log In" button and you now have access to the system and can fill out the form.
9. Once you are registered, you can access the System via the ePCR forms using your EWB User ID and ePCR password. We recommend that you change your password after receiving the temporary one using the following steps, otherwise your temporary password will remain active.

#### To Change Your Password:

1. To change your password open any ePCR form, enter your EWB User ID and select the "Change Password" link:

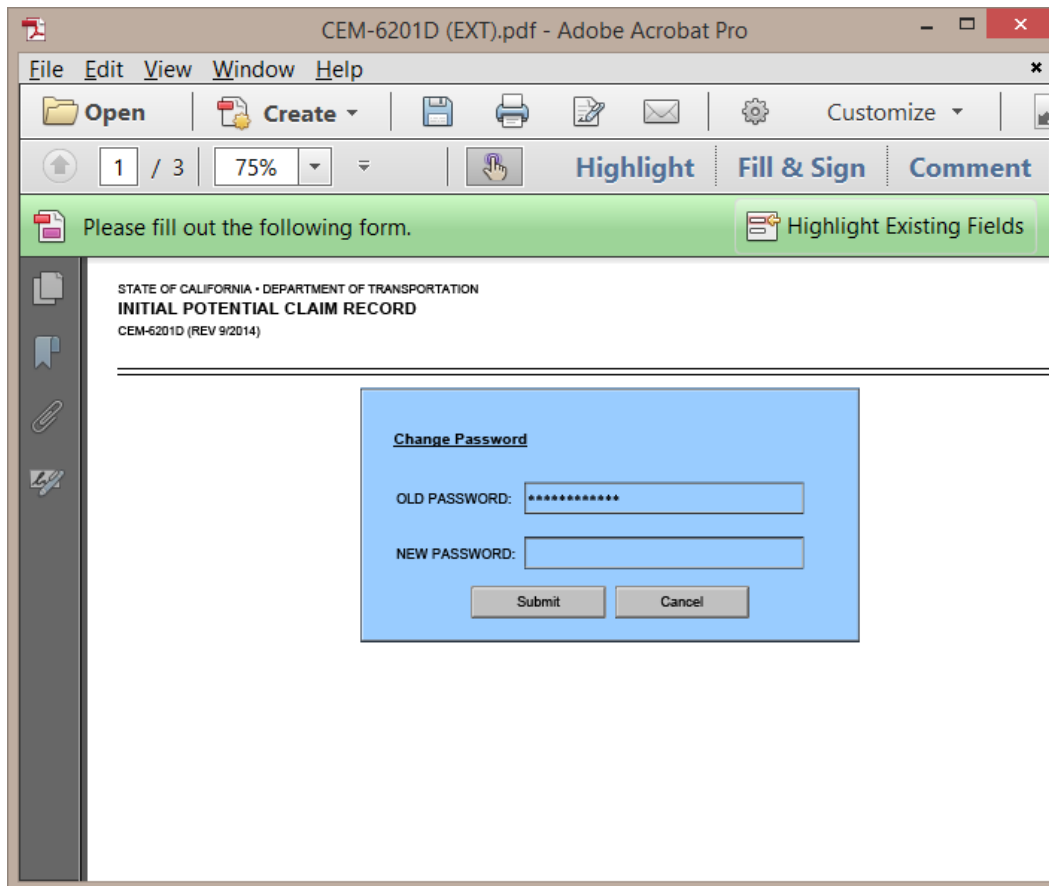


2. Next enter your existing ePCR password into the OLD PASSWORD field. The OLD

PASSWORD is either:

- a. The temporary password emailed via the System shown in the previous steps or
- b. If you previously created a new password and would like to change it, then you would enter the existing password you currently use in the System.

If you are using the temporary password emailed to you, we recommend you use the copy/paste feature on your device.



The screenshot shows the Adobe Acrobat Pro interface. The title bar reads 'CEM-6201D (EXT).pdf - Adobe Acrobat Pro'. The menu bar includes 'File', 'Edit', 'View', 'Window', and 'Help'. The toolbar contains 'Open', 'Create', 'Save', 'Print', 'Sign', 'Mail', 'Customize', and a search icon. The navigation pane shows '1 / 3' pages and '75%' zoom. The main content area displays a PDF form titled 'STATE OF CALIFORNIA • DEPARTMENT OF TRANSPORTATION INITIAL POTENTIAL CLAIM RECORD CEM-6201D (REV 9/2014)'. A blue 'Change Password' dialog box is centered on the page, containing two text input fields: 'OLD PASSWORD: \*\*\*\*\*' and 'NEW PASSWORD:'. Below the fields are 'Submit' and 'Cancel' buttons. A green banner at the top of the form area says 'Please fill out the following form.' with a 'Highlight Existing Fields' button.

3. Enter a new password
4. This password will be valid on all potential claim records for all present projects or future projects.

**Note: If you want to reset your password, enter your EWB User ID, then click the “Reset Password” link and follow the on-screen instructions.**