California Pay Data Reporting Workflow Instructions

"California employers of 100 or more employees are now required to report pay and hours-worked data by establishment, job category, sex, race and ethnicity to the Department of Fair Employment and Housing by March 31, 2021." - DFEH

The HRM Software is now ready for reporting. Please update your HRM software to versions 8.118.0.722 or newer *before* generating and submitting your reports. This option has been added to the existing EEO-1 Report Information window under the Reports menu.

Edit Employee EEO Status

Quickly add EEO-1 information to multiple employee accounts by using the *Edit Employee EEO Status* utility. Go to **Employees > Edit Employee EEO Status.**

By default, this option will lists all employee accounts. It is not necessary for all employee accounts to have the EEO Job Category and EEO Race assigned. Only the employees who worked during the "workforce snapshot" period must have these assigned. Programs using a SQL database will have the option of filtering the accounts in this grid. For instructions on filtering accounts, see Step 6, under the heading: "EEO-1 Component 2 Reporting Instructions."

A **new** feature has been added for HRM software versions **8.118.0.723 and newer**. When a row in the grid is highlighted and either of the category entries is selected, keying the first letter of a category option will either select or toggle through any of the options that begin with that letter.

1. Go to **Employees** > **Edit Employee EEO Status**, the following window will appear.
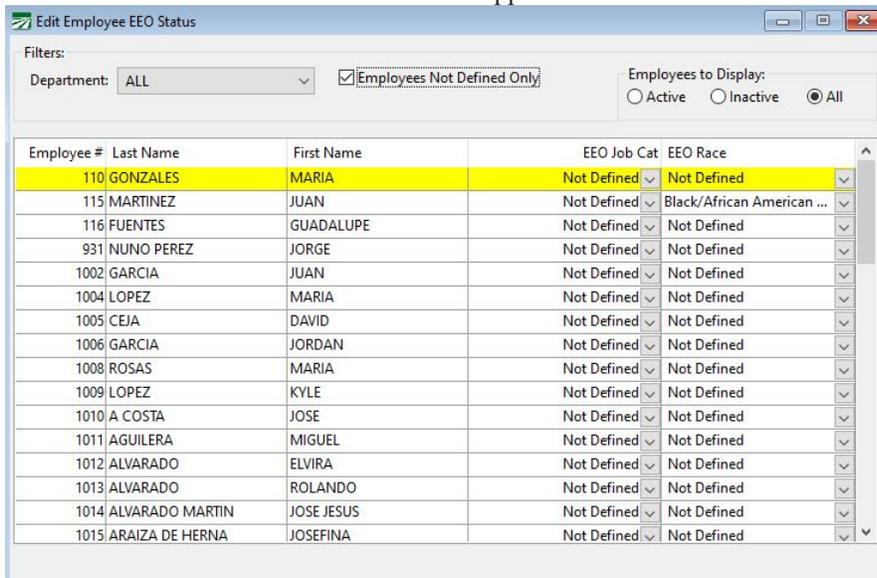
2. If you use Departments, make sure **ALL** is selected from the **Department** drop-down menu.

3. Select **Employees Not Defined Only** to get a complete list of all the employees you need to edit.

4. You may also need to select **All** under **Employees to Display**.

5. Now that you have a list of employees to edit, use the drop-down menus to select the **EEO Job Category** and **EEO Race** for each employee. When you enter the EEO status for an employee, that employee will disappear from the grid. Once the status is entered for every employee file, the grid will be empty.

Please Note: California has codes for non-binary sex, at the moment, this information is not collected in the software. You will need to manually edit data if it is necessary to report any employees under the non-binary sex codes. Please see *B.3 Section II – Establishment Information and Employee Detail Record Layout* of the User Guide for a full list of the Race-Ethnicity-Sex codes.

Please Note: "DFEH recognizes the limitations of these categorizations, but is initially adopting these from the EEO-1 survey for consistency with federal reporting and to ease reporting burden on employers. Employee self-identification is the preferred method of identifying race/ethnicity information. If an employee declines to state their race/ethnicity, employers must still report the employee according to one of the seven race/ethnicity categories, using — in this order — current employment records, other reliable records or information, or observer perception." – DFEH'S FAQ: https://www.dfeh.ca.gov/paydatareporting/faqs

EEO-1 Component 2 Reporting Instructions

When the EEO-1 data is present and accurate, it is time to begin the reporting process. See the following image for reference.

1. In the HRM software, go to **Reports > EEO-1 Report Information**.

2. Enter the Starting and Ending Check Date range that you would like to use to generate your EEO-1 reports. This must be a "workforce snapshot" pay period from October 1 to December 31 of the filing year.

3. User ID is not necessary.

4. Enter the **NAICS Code** for your business. If you are unsure of your Code, click HERE to search Codes by Industry.

5. A default folder location will appear in the **Save In** entry. If you wish to select a different folder location, do so now. You may view the folder in File Explorer by clicking in the Save In entry and pressing the **F12** key.

6. Click **Preview**. The standard EEO-1 PDF report will be generated, and a **Setup/Edit EEO Establishment** window will appear as shown in the following image. If your program uses a SQL database, the **Edit Employee EEO Status** window will also appear. Only the accounts for employees who worked during the "workforce snapshot" that are missing one or more category entries will appear. Edit them as needed, then **repeat this step** until no missing entries are displayed.

Please Note: The HRM Software only supports **Single Establishment** reporting. It does not have the ability to assign employees to separate establishments for Multi-Establishment companies. Companies that share ownership with other companies in a "Control Group" are not considered Multi-Establishment. This is because each company has - and will report under - its own FEIN. If your company has more than one physical location under the same FEIN, and if you have employees that are assigned to specific locations, please contact Datatech for further assistance.

7. In the **Unit Number** entry, enter 1 to indicate the Type of Report (Status Code) you are uploading is for Establishment Number 1.

8. Verify your company name and address appear correctly. Make sure the address entered is a California address.

9. Answer the two question checkboxes and click Ok. When you select a checkbox, you are answering yes to that question.

QuestionB2C: Was an EEO-1 report filed for this establishment last year?

Question D2: Is this establishment (1) Not exempt as provided for by 41 CFR 60-1.5; (2) A Prime Contractor or first-tier subcontractor; and (3) have

a contract, subcontract, or purchase order amounting to $50,000 or more; or serve as a depository of government funds in any amount; or is a financial institution which is an issuing and paying agents for U.S. savings bonds and or saving notes?

10. Enter a description of the major activity or activities of the establishment. Include the specific type of product or type of service provided, as well as the principal business or industrial activity.

11. Click **Ok** to export file.

Edit Pay Data File

Section I: Employer Information

Once you have the file open review Section I: Employer Information. You will notice some fields have an asterisk (*). These are required fields. **The program may not populate some of these fields** because the information was not entered or the field does not exist in the program. **Please enter the required information yourself**.

If you have any questions about a particular field, please refer to the next tab for instructions on each field and section.

	A1	▼	fx	California Pay Data Report Instructions		
				The instructions below explain how to fill out the PayDataReport worksheet using Excel for submission to DFEH. Alternatively, employers		

	A	B	C	D	E	F
1	**California Pay Data Report Instructions** The instructions below explain how to fill out the PayDataReport worksheet using Excel for submission to DFEH. Alternatively, employers may provide the same information using a .CSV file format. For a step-by-step user guide and other detailed guidance (FAQs), visit https://www.dfeh.ca.gov/paydatareporting. **Steps** 1) Review the instructions below as well as DFEH's FAQs, which provide detailed guidance on which employees and establishment must be reported on, and how to identify or calculate an employee's job category, race, ethnicity, sex, pay band, and hours worked. 2) In the PayDataReport worksheet, enter data in Section I: Employer Information (starting on row 3) following the instructions. 3) In the PayDataReport worksheet, enter data in Section II: Establishment Information (starting on row 51) following the instructions. **IMPORTANT: Do not include comma's in the data entered for Section I and Section II.** 4) Save the PayDataReport worksheet locally as an Excel file. 5) Go to http://www.dfeh.ca.gov/paydatareporting to enter the submission portal, upload the Excel, provide other required information, fixed any errors identified by the portal's validation process, and certify the submission. **Pay Data Report Examples** Two examples are provided to demonstrate how employers with a single establish or multiple establishments should fill out the PayDataReport worksheet. The "Example - Single Establishment" tab provides a sample illustration of a completed PayDataReport by a single-establishment employer. The "Example - Multi Establishment" tab provides a sample illustration of a completed PayDataReport by a multi-establishment employer.					
2			**Section I - Employer Information**			
3	**Field**	**Format**	**Type***	**Maximum Length**	**Values, Remark, and Other Instructions**	**Required?**
4	Reporting Year	9999	Numeric	4	Enter the four-digit calendar year for which this report applies (e.g., 2020).	Yes
5	Snapshot Period Begin Date	mm/dd/yyyy	Date	10	Enter the mm/dd/yyyy of the start date of the snapshot period (e.g. 10/01/2020). The snapshot period is a single pay period between October 1 and December 31 of the Reporting Year. Employers are free to choose the single pay period between October 1 and December 31 of the Reporting Year that will serve as their Snapshot Period.	Yes
6	Snapshot Period End Date	mm/dd/yyyy	Date	10	Enter the mm/dd/yyyy of the end date of the snapshot period (e.g. 10/31/2020). The snapshot period is a single pay period between October 1 and December 31 of the Reporting Year. Employers are free to choose the single pay period between October 1 and December 31 of the Reporting Year that will serve as their Snapshot Period.	Yes
7	Employer Name		Alphanumeric	100	Enter employer name as filed with the California Employment Development Department (EDD). If employer is not registered with EDD, use the name provided on the employer's most recent federal Employer Information EEO-1 Report.	Yes
8	EDD Address Line 1		Alphanumeric	200	Enter employer's address line 1 as filed with EDD. If employer is not registered with EDD, use the information provided on the employer's most recent federal Employer Information EEO-1 Report.	Yes
9	EDD Address Line 2		Alphanumeric	200	Enter employer's address line 2 as filed with EDD. If employer is not registered with EDD, use the information provided on the employer's most recent federal Employer Information EEO-1 Report.	No
10	EDD City		Alphanumeric	50	Enter employer's city as filed with EDD. If employer is not registered with EDD, use the information provided on the employer's most recent federal Employer Information EEO-1 Report.	Yes
11	EDD State	XX	Alphanumeric	2	Enter employer's two-character state code as filed with EDD. If employer is not registered with EDD, use the information provided on the employer's most recent federal Employer Information EEO-1 Report.	Yes

◄ ◄ ► ►		PayDataReport	**Instructions**	Example - Single Establishment	Example - Multi Establishment	
Ready

Section II. B – Employee Detail

Currently, the HR software does not include an option for Race/Ethnicity/Non-Binary. If you wish to report an employee as Non-Binary for the Sex code, you will need to add that line to the report manually. Identify each section the employee is reported and subtract that employee from the count of each section (job category, Race/Ethnicity/Sex, Pay Band, Number of Employees, and Total hours).

Upload File

Download the User Guide provided by DFEH.

Then, select the **Pay Reporting Portal**. Follow their instructions for uploading your completed CA Pay Data Reporting file.

https://www.dfeh.ca.gov/paydatareporting/