

California Pay Data Reporting Portal

USER GUIDE

CALIFORNIA DEPARTMENT OF FAIR EMPLOYMENT AND HOUSING

VERSION 2.0





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1. Introduction

California law (Government Code section 12999) requires private employers with 100 or more U.S. employees (and at least one employee in California) to annually submit data on the pay, hours worked, and demographics of their employees to the California Department of Fair Employment and Housing (DFEH). By March 31, employers must submit their reports covering the prior calendar year. For information about which employers are required to file with DFEH, along with answers to other frequently asked questions (FAQs), visit: http://www.dfeh.ca.gov/paydatareporting/faqs.

1.1 User Guide Overview

This User Guide explains how an employer subject to the California pay data reporting requirement should create and submit its report to DFEH. An employer must submit its report through DFEH's online Pay Data Reporting Portal, using one of three available methods: 1) uploading an Excel file using the template described in Appendix A; 2) uploading a .CSV file consistent with the layout described in Appendix B; or 3) manually entering information using the portal's fillable form. DFEH recommends using either option 1 or 2. DFEH will not accept reports by email or hard copy.

This User Guide is organized into the following sections:

Introduction	Introduces this User Guide, notes key similarities to and
Basic Structure of the CA Pay Data Report	Describes the basic structure establishment employers.
Portal Overview	Provides a general descriptic along with the actions availa
Submitting the CA Pay Data Report	Describes how to create a ne file, uploading a .CSV file, or
Accessing In-Process Reports	Describes how to return to a to complete the certification
Appendix A	Provides a detailed description
Appendix B	Describes how to build the P

overviews the content of a Pay Data Report, and differences from the federal EEO-1 survey.

e of the Pay Data Report for both single- and multi-

on of each page in the Pay Data Reporting Portal ble on the page.

ew Pay Data Report by either uploading an Excel manually entering data via the portal.

previously uploaded or manually created report process.

on of the Pay Data Report template (Excel).

Pay Data Report as a .CSV file.



1.2 Overview of the California Pay Data Report's Content

In summary, the California Pay Data Report requires an employer to group its employees by job category, pay band, race, ethnicity, and sex, and then report to DFEH the number of employees within each group and the total hours worked by the employees in that group, among other information. For employers with more than one establishment, employers must organize and report their data by establishment (defined in Section 2.1 of this User Guide). In order to build its Pay Data Report, the employer will need to:

- Create a "Snapshot" of the employer's employees in order to identify the employees who must be reported on in the Pay Data Report
 - To create a Snapshot, the employer selects a single pay period between Oct. 1, 2020, and Dec. 31, 2020 ("Snapshot Period")
 - A specific time period needs to be selected because throughout the course of a year an employer's employees may change
 - An "employee" is an individual on an employer's payroll, including a part-time individual, whom the employer is required to include in an EEO-1 Report and for whom the employer is required to withhold federal social security taxes from that individual's wages
 - All of the employer's employees assigned to a California establishment and/or working within California during the Snapshot Period must be included in the employer's Pay Data Report
 - Any employees assigned to establishments outside of CA <u>and</u> working outside of CA may be included in the report
 - For additional guidance, review Parts III and VI of <u>DFEH's FAQs</u>
- For each employee in the snapshot period, identify or calculate each employee's:
 - o Establishment
 - Job category
 - Race, ethnicity, and sex
 - Earnings in 2020 (not just during the Snapshot Period), as shown in Box 5 (Medicare wages and tips) of the employee's IRS Form W-2, and the employee's corresponding pay band
 - If any employee has wages not reported in Box 5, as may be the case for an H-2A visa holder for example, use W-2 Box 1 for that employee and note this in the associated remarks field
 - For employees who did not work the entire year, do not annualize their pay
 - Number of hours worked in 2020 (not just during the Snapshot Period)
 - Include the number of hours the employee was on any form of paid time off for which the employee was paid by the employer, such as vacation time, sick time, or holiday time
 - For employees who did not work their entire year, do not annualize their hours worked
 - For additional guidance, review Parts III VI of <u>DFEH's FAQs</u>



- Within each establishment, group employees by job category, pay band, race/ethnicity/sex, and then calculate the total number of employees in each group and the total hours worked in 2020 by the employees in each group
 - If no other employees share the same categories as an employee, the employee is reported as a group of 1 and is reported in the same fashion as groups of more than 1 employee (note California pay data reports are not publicly available)
 - There are 2,520 possible combinations of job category, pay band, and race/ethnicity/sex:
 - 10 job categories x 12 pay bands x 21 race/ethnicity/sex combinations = 2,520
 - A bird's eye illustration of all of 2,520 possible combinations is <u>available here</u>. Zoom in to see each cell more clearly.
- Gather other required employer and establishment level information, as well as any explanatory information that may need to be noted in the remarks fields



1.3 Key Similarities and Differences with the EEO-1 survey

The California Pay Data Report has key similarities to and differences from the EEO-1 survey under federal law, including:

- <u>Key Similarities</u>: For the California Pay Data Report, employers should:
 - \circ $\;$ Use the same establishments that they use in the EEO-1 survey
 - Follow the EEOC guidance on job categorization, race, and ethnicity
- <u>Key Differences</u>: Unlike the EEO-1 Component 2 data collection that occurred in 2019 (for calendar years 2017 and 2018), the California Pay Data Report requires that:
 - Non-binary employees be reported in the same manner as male and female employees
 - \circ $\,$ An employee's pay is reported from W-2 Box 5 $\,$
 - However, if any employee has wages not reported in Box 5, as may be the case for an H-2A visa holder for example, use
 W-2 Box 1 for that employee and note this in the associated remarks field
 - An employee's hours worked in 2020 includes any hours the employee was on any form of paid time off for which the employee was paid by the employer (such as vacation time, sick time, or holiday time) during 2020
 - Multiple-establishment employers report all establishments, including those with fewer than 50 employees, in the same manner by providing the number of employees and total hours worked for each employee group assigned to the establishment
 - DFEH does not permit employers to submit what is known in the federal EEO-1 survey as a "Type 6" list of establishments of fewer than 50 employees
 - Multiple-establishment employers do not report consolidated data
 - If an employee's W-2 is corrected after the employer submits its Pay Data Report, and the correction would put the employee in a different pay band than originally reported or would otherwise require a correction on the employer's report, the employer should promptly submit a corrected pay data report, identifying the corrected cells and explaining the correction in the remarks field(s)



2. Basic Structure of the California Pay Data Report

An employer's Pay Data Report has two sections. In Section I, Employer Information, the employer provides information at the full organizational level. In Section II, Establishment Information and Employee Detail, the employer provides information at the establishment and employee levels. Provided below are key terms used in this User Guide, followed by several illustrations that demonstrate how the Pay Data Report is structured for single- and multiple-establishment employers. Additional key terms are explained in Section 1.2 of this User Guide and in DFEH's FAQs.

2.1 Key Terms

Employer

- For the purposes of California Pay Data Reporting, an employer means any private employer of 100 or more employees anywhere in the U.S. (with at least one employee in California) and that is required to file an Employer Information Report (EEO-1 Report) pursuant to federal law.
- A Pay Data Report covers only a single employer.
- For more information about which employers are required to file a Pay Data Report and guidance on how to determine if an employer has the requisite number of employees, see <u>FAQ</u> "Which employers are required to submit pay data reports to DFEH?", among others.

Establishment

- An establishment is an economic unit producing goods or services such as a factory, office, store or mine.
- A Pay Data Report covers all the establishments of a single employer.
- For a single-establishment employer, employer and establishment are synonymous.
- For the purposes of the Pay Data Reports due to DFEH by March 31, 2021, employers should utilize the same establishments that they use for their EEO-1 Reports, and employers should assign employees to the establishment where the employer reports the employee for federal EEO-1 purposes.
- A multiple-establishment employer must report on all of its establishments, including those with fewer than 50 employees, in the same manner.
- For more information, see <u>FAQ</u> "What does "establishment" mean? What does it mean for an employee to be "assigned to" an establishment?", among others.



Employee Detail

- Employees at an establishment are organized into groups that share the same combination of job category, race/ethnicity/sex, and pay band.
- Employers report the number of employees in the same group and report the total number of hours worked by this group during 2020.
- There are 2,520 possible combinations of job category, pay band, and race/ethnicity/sex:
 - 10 job categories x 12 pay bands x 21 race/ethnicity/sex combinations = 2,520
 - A bird's eye illustration of all of 2,520 possible combinations is <u>available here</u>. Zoom in to see each cell more clearly.
- Each job category, race/ethnicity/sex combination, and pay band has an associated code in the Pay Data Report, as illustrated in the examples on the following pages.
- For more information, see Parts III VI of DFEH's FAQs.



Job Categories	Race/Ethnicity/Sex		Pay Bands
1. Executive senior level officials and managers	A10 - Hispanic/Latino - Male	1.	\$19,239 and under
2. First or mid-level officials and managers	A20 - Hispanic/Latino - Female	2.	\$19,240 - \$24,439
3. Professionals	A30 - Hispanic/Latino - Non-Binary	3.	\$24,440 - \$30,679
4. Technicians	B10 - Non-Hispanic/Non-Latino - Male - White	4.	\$30,680 - \$38,999
5. Sales workers	B20 - Non-Hispanic/Non-Latino - Male - Black or African American	5.	\$39,000 - \$49,919
6. Etc.	Etc.	6.	Etc.

For example, assume that a single-establishment employer has 100 employees. Of these, ten are Sales workers, Latina, and Female; each made between \$39,000 - \$49,919 during the Reporting Year. This group would be reported in Section II.B of the Pay Data Report with the following Employee Details:

Job Category = 5 Race/Ethnicity/Sex = A20 Pay Band = 5 Number of Employees = 10

To complete Section II of the Pay Data Report, the employer would create similar groupings for all remaining employees who worked at the establishment.

With these key terms in mind, the following pages provide examples.



2.2 Single-Establishment Employer

The example below depicts a single-establishment employer with 120 employees.

Pay Data Report Example Single-Establishment Employer

- This employer has only one establishment
 - Establishment A Atlantic Ave with 120 employees
 - Employer and Establishment A are the same
- Establishment A employees fit into two groups
 - Group 1 (70 employees)
 - Group 2 (50 employees)
 - Each group represents all employees who share the same combination of job category, race/ethnicity/sex, and pay band



2.2.1 Single-Establishment Report Structure

The illustration below depicts how the employer from the previous example would organize its information for submission in the Pay Data Report.

Pay Data Report Example Report Structure (single establishment)

- The Pay Data Report includes two sections:
- Section I Employer Information
 - Section I captures information at the employer level
 - Includes information such as name, address, SEIN, FEIN, and contact information
 - Each Pay Data Report includes only one Section I
- Section II Establishment Information and Employee Detail
 - Section II captures two types of data: establishment information and employee information
 - Establishment information includes data such as the establishment's name, address, and total number of employees (for a single-establishment employer, some fields in Section II will be the same information provided in Section I)
 - Employee Detail includes job category, race/ethnicity/sex, pay band, the total number of employees who share the same grouping, and the group's hours worked in 2020



(100,000)



- The employer would fill in the Pay Data Report Template (Excel) as follows:
 - The example contains only a partial excerpt from the contents of the Pay Data Report Template
 - See Appendix A: Building the CA Pay Data Report Excel File for a complete and detailed example

Section	II.A – Estab Informatior	lishment 1		Section I	l.B – Employe	e Detail	
Name*	Address Line 1*	Establishment Total Employees*	Job Category*	Race/Ethnicity /Sex*	Pay Band*	Number of Employees*	Hours Worked*
ABC Corp.	Atlantic Ave	120	5	B60	6	70	140000
ABC Corp.	Atlantic Ave	120	4	A20	8	50	100000



2.3 Multiple-Establishment Employer

The example below depicts a multiple-establishment employer with 100 employees across two establishments.

Pay Data Report Example Multiple-Establishment Employer

- The example shows an Employer with 100 employees across two establishments
 - Establishment A Atlantic Ave with 70 employees
 - Establishment B Pacific Ave with 30 employees
- Establishment A employees fit into two groups
 - Group 1 (30 employees)
 - Group 2 (40 employees)
 - Each group represents all employees who share the same combination of job category, race/ethnicity/sex, and pay band
- Establishment B employees fit into three groups
 - Group 1 (15 employees)
 - Group 2 (10 employees)
 - Group 3 (5 employees)
 - Each group represents all employees who share the same combination of job category, race/ethnicity/sex, and pay band





2.3.1 Multiple-Establishment Report Structure

Pay Data Report Example Report Structure (multiple establishment)

- The Pay Data Report includes two sections
- Section I Employer Information
 - Section I captures information at the employer level
 - Includes information such as name, address, SEIN, FEIN, and contact information
 - Each Pay Data Report includes only one Section I
- Section II Establishment Information and Employee Detail
 - Section II captures two types of data: establishment information and employee information
 - Establishment information includes data such as the establishment's name, address, and total number of employees
 - Employee Detail information includes job category, race/ethnicity/sex, pay band, the total number of employees who share the same grouping





- The employer would fill in the Pay Data Report Template (Excel) as follows
 - The example below contains only a partial excerpt from the contents of the Pay Data Report Template
 - See Appendix A: Building the CA Pay Data Report Excel File for a completer and more detailed example

Section II.A	– Establishmen	t Information		Section II.	B – Employ	ee Detail	
Name*	Address Line 1*	Establishment Total Employees*	Job Category*	Race/Ethnicity /Sex*	Pay Band*	Number of Employees*	Hours Worked*
Establishment A	Atlantic Ave	70	5	B60	6	30	60000
Establishment A	Atlantic Ave	70	4	A20	8	40	80000
Establishment B	Pacific Ave	30	7	C40	7	15	30000
Establishment B	Pacific Ave	30	3	A10	8	10	20000
Establishment B	Pacific Ave	30	8	C10	7	5	10000

3. Portal Overview



This section provides an overview of the primary pages that comprise the California Pay Data Reporting Portal. The pages are presented in a typical sequence that employers will experience when uploading/creating, editing, and certifying a Pay Data Report.

Step-by-step instructions are provided below in Section 5 – Submitting the CA Pay Data Report.

	Login
Но	ne
	Welcome to the California Pay Data Reporting Portal
	California law (Government Code §12999) requires employers with 100 or more employees to annually submit data on the pay, hours worked, and demographics of their employees to the California Department of Fair Employment and Housing (DFEH). For more information about this law and filing requirements, visit: www.dfeh.ca.gov/paydatareporting. The first filing deadline was March 31, 2021, and annually thereafter on March 31.
	Employers must use this portal to submit their pay data reports to DFEH. The high-level steps to submit the report are:
	1. Register and create a log-in to the portal. 2. Provide employer demographic information. 3. Provide pay data information in one of three ways:
	Prior to certification of a report, an employer may re-enter the portal to change their report using their login credentials. After certification, the employer can access a read-only version of their certified pay data reports. If an employer needs to revise information previously certified, the employer must start a new report and explain the correction in the remarks section of the report.
	Instructions are provided within the portal, in the user guide, and in the FAQs available at: www.dfeh.ca.gov/paydatareporting.
	View My Pay Data Reports
	Communication Center: 800-884-1.684 (voice), 800-700-2320 (TTY) or California's Relay Service at 711 paydatareporting8dfeb.ca.gov

Welcome Page

- This is the first page displayed upon accessing the Portal
- Provides information about filing requirements and links to helpful resources
- If the user is logged in, provides a link to view their pay data reports

- L. Log into the Portal
- 2. View pay data reports





User Login Page

- This page allows registered users to log into the Portal
- Detailed instruction can be found in section <u>4 – Logging into the Portal</u>

- 1. Log into the Portal
- 2. Create a new user
- 3. Change or recover your user password



	Pay Data Reports											
ay Da	ata Reports											
rify your e	employer information below	w. If it is your first tim	e logging into the portal, you	I can match with an existing	employ	er based on prior pa	ay data reports or cre	eate a new Empl	loyer.			
submit a	Pay Data Report, click the	e "Start a new Pay D	ata Report" button. You will b	be prompted to complete the	Section	I: Employer Inform	ation data record. W	/hen complete, c	lick the "Next" button	n. A new report wi	l be adde	ed
the Pay D	ata Reports table below.	Click the "Pay Data F	Report Name" link in the table	a to continue creating the rep	port.							
continue	editing an existing pay dat	ta report, click the "F	'ay Data Report Name" link ir	a the table below. Only report	rts with	a "New" status can	be edited.					
ports that	t are not yet certified can b	e withdrawn at any	lime. While viewing the repor	t, click the "Withdraw Repor	t" buttor	n in the top-right to i	update the report's s	tatus to "Withdra	awn".			
ly Em	ployer: Acme W	/ater Works	- Inc									
EIN: 12 EIN: 12 DUNS: 9 NAICS: 2	3456789 345678 87654321 221310				Addr 1234 Sacra	ess: Main Avenue, Su amento, CA 9582	ite 500 50100					
Concernance of the second	a anu Dau Data Banast											
Start	a new Pay Data Report											
Start a	a Reports Shared V	With Me 🔻										
Start a	a Reports Shared N ed by Pay Data Report Name • 1	With Me 👻	eports + Updated 5 minutes ago						Q. Search this list		¢ •	C
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Start a ay Data ems + Sorte 1 P 2 P	a Reports Shared N ad by Pay Data Report Name + Pay Data Report Nam. † ~ 10RS-20210701-3 10RS-20210701-4	With Me V Filtered by All pay data of Status V Certified Withdrawn	reports + Updated 5 minutes ago Account Acme Water Works - Inc Acme Water Works - Inc	Employer Name Acme Water Works - Inc Acme Water Works - Inc	~	Employer CA ~ 12345678 12345678	Employer FEIN v 123456789 123456789	Reporting ~ 2020 2020	 Q. Search this list Snapshot Perl 10/16/2020 10/16/2020 	Snapshot Peri 10/31/2020 10/31/2020	\$ ~ ~	C

An employer may only certify one report each year. Therefore, the certified report must

contain all of the employer's data. An employer's data cannot be submitted across multiple

Pay Data Reports Page

- This page offers employers the ability to view and maintain their demographic information and keep it current at any point
- If it is the user's first time entering the portal, it allows them to search for an existing employer or create a new one
- This page provides a list of all Pay Data Reports for the employer
- While an employer can have more than one certified report for the same reporting year listed on this page, DFEH will use the most recently certified report for the reporting period.
- Why might an employer have more than one certified report for the reporting year? This might happen if a Pay Data Report is certified and then the employer discovers an error and a corrected report is certified.
- Under this scenario, both reports will display, but only the most recently certified report would be considered to be the certified report for the reporting year by DFEH

Actions Available

- 1. Select or create an employer
- 2. Create/edit/view pay data reports
- 3. Maintain employer account information to keep information up-to-date

reports.



	Bob Robert
Home Pay Data Reports	
Pay Data Report Submission Details	
	Withdraw Report
Step 1: Employer Information Step 2: Establishment & Employee Information Step 3: Certify	y and Submit
Employer Information	
Manually complete the Employer Information record below. 1. Click the pencil icon in any field to enter values. 2. * indicates a required field. 3. To save changes, select "Save". 4. To reset data to the original values and NOT save changes, select "Cancel". 5. When complete, click the "Step 2: Establishment & Employee Information" tab at the top or 6. To withdraw the report, click the "Withdraw Report" button in the top-right of the page.	of the page.
Pay Data Report Name	Status
PDRS-20210701-5	New
summission Opioao IDig a2er000000015ngAAC	
Account Acme Water Works - Inc	Employer DUNS Number
Employer Name	Employer CA SEIN
Acme Water Works - Inc	Employer FEIM
No	123456789
Employer-Level Clarifying Remarks	Affiliated FEINs
✓ Summary	
Reporting Year	Employer's Ownership
2020 Snanshot Period Regin Date	No
10/16/2020	10/31/2020
Employer's Total CA Establishments 3	Employer's Total CA Employees 150
Employer's Total U.S. Establishments 🕕	Employer's Total U.S. Employees
V EDD Address Information	
EDD Address Line 1	EDD Address Line 20
1234 Main Avenue	Suite 500
EDD City 🖤 Sacramento	EDD State CA
EDD ZIP Code	EDD Country 🕖 US
> Headquarters Address Information	
> Parent Company	

Employer Information Detail Page

- This page displays the Section I (Employer Information) data record for a given Pay Data Report
- So, whereas the Pay Data Reports List page displays reports, this page displays the contents (i.e., data records) within a report
- This page is the first of three steps to complete the report

- 1. View and/or edit the Section I: Employer Information data record
- 2. Correct validation errors identified in a data record
- 3. Click the Step tabs to navigate through the report
- 4. Withdraw the report; it will no longer be editable



Des Date Deserte	
Pay Data Reports	
ay Data Report Submission Details	
	Withdraw Report
p 1: Employer Information 5tep 2: Establishment & Employee Information Step 3: Certify and Submit	
ection II: Establishment Information & Employee Details	
ta records can be imported (suggested) or entered manually.	
import the data records a propared Excel or CSV file can be used:	
1. Upload an Excel file	
a. Download the California Pay Data Report Template.	
b. Fill in the "PayDataReport" worksheet following the isntructions provided in the template to create the Section II data records.	
c. Save the worksheet locally as a new Excernite. d. Upload the Excer file by selections "Upload Data File."	
e. Edit the report as needed and correct any error identified by the portal's validation processes.	
2. Upload a .CSV file	
a. Prepare a. CSV file with the required data (See detaild. CSV specification in the user guide). Example file.	
 Edit the report as needed and correct any enrors identified by the portal's validation processes. 	
An Accord to Acc	
 To withdraw the report, click the "Withdraw Report" button in the top right corner of the page. 	
Download Template	
😽 Section II Data Import	
. ↓ Upload Data File	
tion 2: Manual Entry cont the descent executive calls the Establishment leformation and accepted it to all contribution Executive Descent	
create the data records manually, enter the cistabilisment mormation and associate it to all applicable employee Detail Records. 1. Enter the Establishment Information	
a. In the Establishment Information Widget, click the "New" button.	
b. Enter the required information in the fillable form available within the portal to create the Establishment Information Record.	
c. When entering the required information online, follow the instructions provided in the California Pay Data Report Template or the user guide's Appendix B.	
 c. Call the report as needed and correct any errors identified by the portal's validation processes. c. Cancel (Save & New / Save 	
2. Enter the Employee Detail:	
a. In the Employee Details Widget, click the "New" button.	
b. Select the Establishment Name the Employee Detail record is associate to.	
c. Enter une required information in the master come available within the ponal to Enter use required information on the master come available within the ponal to Enter use Entployee Detail record.	
e. Edit the report as needed and correct any errors identified by the portal's validation processes.	
t. Cancel / Save & new / Save	
3. When complete, navigate to the "Step 3. Certify and Submit" tab at the top of the page. 4. To withdraw the renort circle the "Withdraw Beneric" button in the top, of the page.	
•. To window ne report, once are window report battor in the top-right of the page.	
Establishment Information (0)	New
5 Employee Details (0)	New

Establishment Information & Employee Detail Page

- This page displays the Section II (Establishment Information & Employee Detail) data record for a given Pay Data Report
- Use the data import tool to upload Section II data records; they can also be manually entered into the report
- To navigate to related Establishment Information data records, click the Establishment Name link in the Establishment Information table
- To navigate to related Employee Detail data records, click the Employee Detail Name link in the Employee Details table
- This page is the second of three steps to complete the report

- 1. Upload, view, edit, and correct Section II information
- 2. Click the Step tabs to navigate through the report
- 3. Withdraw the report; it will no longer be editable



							(🕘 Bob I
Pay Data Reports								
stablishment Information				S Emple	oyee Details	(5)		
anually complete the Establishment Information re	ecord below.			Employee	Pay Data Re	Pay Band	Race/Ethnici	
 Click the pencil icon in any field to enter value * indicates a required field 	S.			PDED3569	PDRS-2021	11-\$163,80	C20 - Non-Hi	•
3. To save changes, selec "Save."				PDED3569	PDRS-2021	10-\$128,96	C50 - Non-Hi	•
4. To reset data to the original values and NOT s	ave changes,	select "Cancel."		PDED3569	PDRS-2021	10-\$128,96	B10 - Non-Hi	•
5. To navigate back to the Pay data Report, click	the "Pay Data	a Report" link.	velated records table on the right of	PDED3569	PDRS-2021	8 - \$80,080	B60 - Non-Hi	T
 To view an associated Employee Detail record the page. 	I, CIICK ING EN	npioyee Detail name link in the	related records table on the right of	PDED3569	PDRS-2021	8 - \$80,080	C60 - Non-Hi	•
							v	/iew All
Pay Data Report PDRS-20210701-3								
 Establishment Name and Address 								
Establishment Name		Headquarters						
Acme Water Works - Inc - Station 1000 (AB66242)		Yes						
Street Address		Street Address 2						
1234 Main Avenue		Suite 500						
City		State						
Sacramento		CA						
ZIP Code 95825								
✓ Establishment Details								
Pay Data Report Submitted in Prior Year?								
No								
EEO 1 Report								
Establishment ID								
1234567								
NAICS Code								
Total Number of Employees 75								
Major Activity Sell and install water supply systems								
Created By		Last Modified By						
Bob Roberts, 7/1/2021 9:24 PM		Bob Roberts, 7/1/2021 9:24	PM					

Establishment Information Data Page

- This page displays the contents of the Establishment Information portion of a Section II data record
- To navigate to related Employee Detail data records, click the Employee Detail Name link in the table on the right of the screen

- View, edit, correct, and save information for the Establishment Information portion of a Section II data record
- 2. Manually create and save the Establishment Information portion of a Section II data record
- 3. Navigate back to the Pay Data Report by clicking the Pay Data Report link



		🕒 Bob Ro
Pay Data Reports		
mployee Detail		
nually complete the Employee Detail record below. 1. Click the pencil icon in any field to enter values. 2. " indicates a required field. 3. To save changes, select "Save". 4. To reset data to the original values and NOT save changes, select "Cancel". 5. To navigate back to the Pay Data Report, click the "Pay Data Report" link. 6. To view the associated Establishment Information record, click the "Establishment Name" lind	k in the Required Information sub-section.	
Employee Detail Name PDED3569861		
Pay Data Report PDRS-20210701-3		
✓ Required Information		
Establishment Name Acme Water Works - Inc - Station 1000 (AB66242)		
Job Category ① 1 - Executive senior level officials and managers		
Pay Band 11 - \$163,800 - \$207,999		
Race/Ethnicity/Sex C20 - Non-Hispanic/Non-Latino - Female - Black or African American		
Total Number of Employees		
Total Hours® 1,987		
✓ Optional		
Row-Level Clarifying Remarks		
Created By Bob Roberts, 7/1/2021 9:24 PM	Last Modified By Bob Roberts, 7/1/2021 9:24 PM	

Employee Detail Data Page

 This page displays the contents of the Employee Detail portion of a Section II data record

- View, edit, correct, and save information for the Employee Detail portion of a Section II data record
- 2. Manually create and save the Employee Detail portion of a Section II data record
- 3. Navigate back to the Pay Data Report by clicking the Pay Data Report link
- Navigate back to the Establishment Information data record by clicking the Establishment Name link



	🕒 Bob Roberts
Home Pay Data Reports	
Pay Data Report Submission Details	
	Withdraw Report
Step 1: Employer Information Step 2: Establishment & Employee Information Step 3: Certify and Submit	
Once your report is final and ready for submission, an authorized official of the employer should certify that the information reported is accurate and prepared in acc clicking the "Certify and Submit" button below.	cordance with the instructions by
Once certified, you will no longer be able to revise your report. In the event you need to make a revision, start the process over and submit the corrected report applicable remarks field(s).	rt, explaining the correction(s) in the
To withdraw the report, click the "Withdraw Report" button in the top-right of the page.	
Certify and Submit	
Communication Center: 800-884-1684 (volce), 800-700-2320 (TTY) or California's Relay Service at 711 paydata.reporting@dfeh.ca.gov	

Certification and Submission

- After a Pay Data Report is uploaded or created manually, all validation errors are corrected, and the report is ready for submission to DFEH, this page requires employers to certify the accuracy of the report for official submission to DFEH
- A Pay Data Report is not complete until it is certified by an official of the employer (not a third party)
- Contact information about the certifying official is captured
- After a report is certified and submitted to DFEH, it can no longer be edited; therefore, employers should ensure its accuracy
- This page is the final step to complete the report

- 1. Certify a Pay Data Report for final submission to DFEH
- 2. Click the Step tabs to navigate through the report
- 3. Withdraw the report; it will no longer be editable



4. Logging Into the Portal

4.1 Option I: New User Login

Option I

New User Login

This option will be used by each user accessing the Pay Data Portal for the first time. For returning users, refer to Option II: Returning User Login.

The flow diagram below shows the steps a first-time user will follow to submit their pay data report. Detailed instructions for completing each step are provided on the following pages.





4.1.1 Step 1: Obtain a Username











4.1.2 Step 2: Login to the Portal

Change Your Password	
Enter a new password for Make sure to Include at least: 15 characters 1 uppercase letter 1 number 1 special character • *New Password	
Change Password	
Password was last changed on 7/1/2021 6-24 PM.	
© 2021 www.dfeh.ca.gov. All rights reserved.	



- Enter the **New Password**, verifying the security requirements are met
- Re-enter the password in the **Confirm New Password** field
- The password must be at least 15 characters, include an uppercase letter, a lowercase letter, a number, and a special character



• Select "Change Password" to set the password for accessing the Portal



4.1.3 Step 3: View the Welcome Page

	Bob Roberts
Home	Pay Data Reports
	Welcome to the California Pay Data Reporting Portal
	California law (Government Code §12999) requires employers with 100 or more employees to annually submit data on the pay, hours worked, and demographics of their employees to the California Department of Fair Employment and Housing (DFEH). For more information about this law and filing requirements, visit: www.dfeh.ca.gov/paydatareporting. The first filing deadline was March 31, 2021, and annually thereafter on March 31.
	Employers must use this portal to submit their pay data reports to DFEH. The high-level steps to submit the report are:
	1. Register and create a log-in to the portal. 2. Provide employer demographic information. 3. Provide pay data information in one of three ways:
	Prior to certification of a report, an employer may re-enter the portal to change their report using their login credentials. After certification, the employer can access a read-only version of their certified pay data reports. If an employer needs to revise information previously certified, the employer must start a new report and explain the correction in the remarks section of the report.
	Instructions are provided within the portal, in the user guide, and in the FAQs available at: www.dfeh.ca.gov/paydatareporting.
	View My Pay Data Reports Communication Center: 800-884-1684 (voice), 800-700-2320 (TTY) or California's Relay Service at 711 paydata.reporting@dfeh.ca.gov



to find or create an employer



- Select "Log Out" under the Username to close your session and log out of the Portal
- This is always available throughout the Portal



4.1.4 Step 4a: Match an Employer

Pay Data Reports	
^p ay Data Reports	
erify your employer information below. If it is your first time logging int	o the portal, you can match with an existing employer based on prior pay data reports or create a new Employer.
o submit a Pay Data Report, click the "Start a new Pay Data Report" b the Pay Data Reports table below. Click the "Pay Data Report Name	button. You will be prompted to complete the Section I: Employer Information data record. When complete, click the "Next" button. A new report will be added "link in the table to continue creating the report.
o continue editing an existing pay data report, click the "Pay Data Rep	port Name" link in the table below. Only reports with a "New" status can be edited.
leports that are not yet certified can be withdrawn at any time. While v	iewing the report, click the "Withdraw Report" button in the top-right to update the report's status to "Withdrawn".
* - denotes required information	
Do you want to search for an existing record or create a new one?	
Do you want to search for an existing record or create a new one? Search for Employer	•
Do you want to search for an existing record or create a new one? Search for Employer EIN	Employer CA SEIN
Do you want to search for an existing record or create a new one? Search for Employer * Employer FEIN Do you want to search by 2020 submission ID or 2020 submission details?	*Employer CA SEIN
Do you want to search for an existing record or create a new one? Search for Employer *Employer FEIN Do you want to search by 2020 submission ID or 2020 submission details? Search by Submission ID	*Employer CA SEIN
Do you want to search for an existing record or create a new one? Search for Employer Employer FEIN Do you want to search by 2020 submission ID or 2020 submission details? Search by Submission ID 2020 Submission ID	
Do you want to search for an existing record or create a new one? Search for Employer Employer FEIN Do you want to search by 2020 submission ID or 2020 submission details? Search by Submission ID 2020 Submission ID	*Employer CA SEIN
Do you want to search for an existing record or create a new one? Search for Employer Employer FEIN Do you want to search by 2020 submission ID or 2020 submission details? Search by Submission ID 2020 Submission ID	



• Upon initial login, the user receives a message stating that they are not yet associated to an employer



- Select "Search for Employer" in the Do you want to search for an existing record or create a new one? dropdown
- Enter the Employer Federal FEIN
- Enter the Employer California SEIN



- In the Do you want to search by 2020 submission ID or 2020 submission details? dropdown select "Search by Submission ID"
- Enter the 2020 Submission ID





	Pay Data Reports			
ay	Data Reports			
erify y	our employer information below. If it is your first time logging into the portal, you can match with an exist	ting employer based on prior pay data rep	ports or create a new Employer.	
the F	nit a Pay Data Report, click the "Start a new Pay Data Report" button. You will be prompted to complete ay Data Reports table below. Click the "Pay Data Report Name" link in the table to continue creating th	the Section I: Employer Information data e report.	record. When complete, click the "Next" button. A new report will	I be added
cont	nue editing an existing pay data report, click the "Pay Data Report Name" link in the table below. Only n	eports with a "New" status can be edited.		
eports	that are not yet certified can be withdrawn at any time. While viewing the report, click the "Withdraw Re	eport" button in the top-right to update the	report's status to "Withdrawn".	
* - de	notes required information			
- de Do yo Sei	notes required information uwant to search for an existing record or create a new one? Irch for Employer			•
* - de Do yo Sei	notes required information u want to search for an existing record or create a new one? rch for Employer loyer FEIN	* Employer CA SEIN		¥
* - de Do yo Sei Emp Do yo Sei	notes required information u want to search for an existing record or create a new one? rch for Employer loyer FEIN uvant to search by 2020 submission ID or 2020 submission details? rch by Submission Info	* Employer CA SEIN		¥
- de Do yo Sei Do yo Sei Tota	notes required information u want to search for an existing record or create a new one? loyer FEIN u want to search by 2020 submission ID or 2020 submission details? urch by Submission Info number of US Employees Reported in 2020 * Total number of CA Employees Reported in 2020	*Employer CA SEIN	*Total number of CA Establishments Reported in 2020	



 If the 2020 Submission ID is unavailable, select "Search by Submission Info" in the Do you want to search by 2020 submission ID or 2020 submission details? dropdown



- Enter the Total number of US Employees Reported in 2020
- Enter the Total number of CA Employees Reported in 2020
- Enter the Total number of CA Establishments Reported in 2020



 Select "Link Employer Account" to associate the new user to the employer



Home Pay Data Reports Pay Data Reports
Pay Data Reports
Verify your employer information below. If it is your first time logging into the portal, you can match with an existing employer based on prior pay data reports or create a new Employer.
To submit a Pay Data Report, click the "Start a new Pay Data Report" button. You will be prompted to complete the Section I: Employer Information data record. When complete, click the "Next" button. A new report will be added to the Pay Data Reports table below. Click the "Pay Data Report Name" link in the table to continue creating the report.
To continue editing an existing pay data report, click the "Pay Data Report Name" link in the table below. Only reports with a "New" status can be edited.
Reports that are not yet certified can be withdrawn at any time. While viewing the report, click the "Withdraw Report" button in the top-right to update the report's status to "Withdrawn".
My Employer: Acme Water Works - Inc
FEIN: 123456789 Address: SEIN: 12345678 1234 Main Avenue, Suite 500 DUNS: 987654321 Sacramento, CA 958250100 NAICS: 221310 Sacramento, CA 958250100
Edit Employer Information Start a new Pay Data Report
Pay Data Reports Shared With Me 👻
O items • Sorted by Pay Data Report Name • Filtered by All pay data reports • Updated an hour ago C. Search this list 🕸 • 📿
Pay Data Report T V Status V Account V Employer Name V Employer CASEIN V Employer FEIN V Reporting Year V Snapshot Period V Snapshot Period V

!

If there is not a match with an existing employer, a new employer is created. If this is not correct, please send an email to paydata.reporting@dfeh.ca.gov with a detailed description.



4.1.5 Step 4b: Create Employer

				Bob F
	Pay Data Reports			
ay Da	ata Reports			
erify your e	employer information below. If it is your fir	st time logging into the portal, you can match	with an existing employer based on prior pay data report	ts or create a new Employer.
submit a the Pay D	a Pay Data Report, click the "Start a new F Data Reports table below. Click the "Pay E	Pay Data Report" button. You will be prompted Data Report Name" link in the table to continue	to complete the Section I: Employer Information data re- e creating the report.	cord. When complete, click the "Next" button. A new report will be added
continue	e editing an existing pay data report, click t	the "Pay Data Report Name" link in the table b	elow. Only reports with a "New" status can be edited.	
eports that	at are not yet certified can be withdrawn at	any time. While viewing the report, click the "	Withdraw Report" button in the top-right to update the rep	port's status to "Withdrawn".
o Emr	plover Found - You will n	ot be able to make a submis	sion until this is corrected	
- denote	tes required information			
Do you wan Create a	ant to search for an existing record or create a new a new Employer	one?		
* Employer	er Name			
* Employer	er FEIN	* Employer CA SEIN	Employer DUNS Number	NAICS Code
* Employe Street	yer Address			
City			State 🔘	Zip 🚺
			Select an Option 💌	



• Upon initial login, the user receives a message stating that they are not yet associated to an employer



- Select "Create a New Employer" in the Do you want to search for an existing record or create a new one? dropdown
- Enter the Employer Name
- Enter the Employer Federal FEIN
- Enter the Employer California SEIN
- Enter the Employer DUNS Number
- Enter the Employer NAICS Code
- Enter the Employer Address

C

 Select "Create Employer Account" to associate the new user to the employer



Home Pay Data Reports
Pay Data Reports
Verify your employer information below. If it is your first time logging into the portal, you can match with an existing employer based on prior pay data reports or create a new Employer.
To submit a Pay Data Report, click the "Start a new Pay Data Report" button. You will be prompted to complete the Section I: Employer Information data record. When complete, click the "Next" button. A new report will be added to the Pay Data Reports table below. Click the "Pay Data Report Name" link in the table to continue creating the report.
To continue editing an existing pay data report, click the "Pay Data Report Name" link in the table below. Only reports with a "New" status can be edited.
Reports that are not yet certified can be withdrawn at any time. While viewing the report, click the "Withdraw Report" button in the top-right to update the report's status to "Withdrawn".
My Employer: Acme Water Works - Inc
FEIN: 123456789 Address: SEIN: 12345678 1234 Main Avenue, Suite 500 DUNS: 987654321 Sacramento, CA 958250100
Edit Employer Information Start a new Pay Data Report
Pay Data Reports Shared With Me ▼ 0 items * Sorted by Pay Data Report Name * Filtered by All pay data reports * Updated an hour ago Q: Search this list
Pay Data Report 🕈 🗸 Status 🗸 Account 🗸 Employer Name 🗸 Employer CASEIN V Employer FEIN V Reporting Year V Snapshot Period V



4.1.6 Step 5: View Pay Data Reports

Py Data Reports Py Data Reports Very your employer information below. If it is your first time logging into the portal, you can match with an existing employer based on prior pay data reports or create a new Employer. To south a Pay Data Report. Click the "Pay Data Report Nume" link in the table book. Only reports with a "New" status can be edited. To continue editing an existing pay data report. Click the "Pay Data Report Name" link in the table book. Only reports with a "New" status can be edited. Reports that are not yet certified can be withdrawn at any time. While viewing the report. Click the "Withdraw Report" button in the top-right to update the report's status to "Withdrawn". My Employer: Acme Water Works - Inc Filth: 123456739 1234 Main Avenue. Suite 500 Duths: 807654321 1234 Main Avenue. Suite 500 Duths: 807654321 Sacramento, CA 958250100 Nate:: Sect new Pay Data Report Mare * Viet reployer Information Sacramento, CA 958250100 Pay Data Reports Shared With Me * Pay Data Report Shared With Me * Outer * Status by Pay Data Report thight a hour age: Pay Data Report_ filter by Jata Pay adar report * Updated an hour age: Pay Data Report Shared With Me * Pay Data Report_ filter by Jata Pay data report * Updated an hour age:			Bob Robe
Pay Data Reports Werk your employer information below. If it is your first time logging into the portal, you can match with an existing employer based on prior pay data reports. Click the "Next" button. A new report with a complete is Section 1: Employer information data record. When complete, click the "Next" button. A new report with a complete is a continue editing an existing pay data report, click the "Pay Data Report Name" link in the table below. Only reports with a "New" status can be edited. Reports that are not yet certified can be withdrawn at any time. While viewing the report, click the "Withdrawn Report" button in the top-right to update the report's status to "Withdrawn". Method Reports Accent Works - Incc. Method Reports Accent Works - Incc. Method Report Shared With Method Method Report Shared Works - Incc. Method Report Shared Works - Incc. Method Report Shared With Method Method Report 1: Employer CASEIN V Imployer FEIN V Reporting Year V Sagehter Period Method Report	e Pay Data Reports		
lerity your employee information below. If it is your first time logging into the portal, you can match with an existing employee based on prior pay data reports. When complete, click the "Next" button. A new report will be a continue creating the report. To continue defling an existing pay data report, click the "Pay Data Report Name" link in the table below. Only reports with a "New" status can be edited. Reports table below. Click the "Pay Data Report Name" link in the table below. Only reports with a "New" status can be edited. Reports that are not yet certified can be withdrawn at any time. While viewing the report, click the "Withdraw Report" button in the top-right to update the report's status to "Withdrawn". PIM: 123456789 EIM: 123456789 EIM: 123456789 EIM: 123456789 EIM: 123456789 EIM: 123456789 EIM: 23456780 EIM: 23456780	Pay Data Reports		
so solution to a Pay Data Report, click the "Stat an new Pay Data Report builton. You will be prompted to complete the Section 1: Employer Information data record. When complete, click the "Next" builton. A new report will be as the Pay Data Report state below. Click the "Pay Data Report Name" link in the table boow. Convergence with a "New" status can be edited. teoports that are not yet certified can be withdrawn at any time. While viewing the report, click the "Withdraw Report" builton in the top-right to update the reports status to "Withdrawn". Address: 21234 Main Avenue, Suite 500 Sacramento, CA 958250100 Ret Engloyer Information Ret Pay Data Report With Me * Ret Engloyer Mame * Ret Pay Data Reports Shared With Me * Ret Sorted by Pay Data Reports Prized by All pay data reports • Updated an horr age Pay Data Report. Ret No. Xex unit X	erify your employer information	below. If it is your first time logging into the portal, you can match with an existing employer based on prior pay data reports or create a new Employer.	
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And temployer: Acme Water Works - Inc FLIN: 123456789 EVEN: 12345789 DUMS: 987654321 NACS: 221310 Edit Employer Information Start a new Pay Data Report Pay Data Report Name + Filtered by All pay data reports + Updated an hour ago Pay Data Report. T v Status v Account v Employer Name v Employer FEIN v Reporting Year v Snapshot Period v Snapshot Per	eports that are not yet certified	can be withdrawn at any time. While viewing the report, click the "Withdraw Report" button in the top-right to update the report's status to "Withdrawn".	
FEIN: 123456789 2010 SEIN: 12345678 1234 Main Avenue, Suite 500 Sacramento, CA 958250100 NaICS: 221310 Edit Employer Information Start a new Pay Data Report Start a new Pay Data Report Name • Filtered by All pay data reports • Ugdated an hour ago Pay Data Report. T v Status v Account v Employer Name v Employer CA SEIN v Employer FEIN v Reporting Year v Snapshot Period v Snapshot Period v	Ay Employer: Acm	e Water Works - Inc	
Edit Employer Information Start a new Pay Data Report Pay Data Reports Shared With Me Items + Sorted by Pay Data Report Name + Filtered by All pay data reports + Updated an hour ago Pay Data Report ↑ Status Account Employer CA SEIN Employer FEIN Reporting Year Snapshot Period Snapshot Period Snapshot Period Snapshot Period Snapshot Period	FEIN: 123456789 SEIN: 12345678 DUNS: 987654321 NAICS: 221310	Address: 1234 Main Avenue, Suite 500 Sacramento, CA 958250100	
tems + Sorted by Pay Data Report Name + Filtered by All pay data reports + Updated an hour ago Pay Data Report $\uparrow \lor$ Status \lor Account \lor Employer Name \lor Employer CA SEIN \lor Employer FEIN \lor Reporting Year \lor Snapshot Period \lor Snapshot Period \lor		_	
Pay Data Repor 🕈 v Status v Account v Employer Name v Employer CA SEIN v Employer FEIN v Reporting Year v Snapshot Period v	Start a new Pay Data Report Pay Data Reports Shar	ed With Me 🗸	
	Start a new Pay Data Report Pay Data Reports Shar items + Sorted by Pay Data Report N	ed With Me 👻 ame • Filtered by All pay data reports • Updated an hour ago	nis list 🗘 🤆
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	Pay Data Report ports Shai uy Data Report N ta Report 수 N	ed With Me ame + Filtered by All pay data reports + Updated an hour ago Status	his list Q • C d v Snapshot Period v



• The portal will display all pay data reports associated to the employer


4.2 Option II: Existing User Login

Option II Existing User Login This option will be used by each user returning to the Pay Data Portal after their initial login. For first-time users, refer to Option I: New User Login.

The flow diagram below shows the steps a user will follow to re-enter the portal to view and submit their pay data reports. Detailed instructions for completing each step are provided on the following pages.





4.2.1 Step 1: Login to the Portal





- Enter the **Username** created when first accessing the Portal
- Enter the **Password** created when first accessing the Portal





- In the event of a lost password, select "Forgot your password?"
- See Step <u>4</u> for details.



 Select "View My Pay Data Reports" to view your pay data reports

Username to close your session and

• This is always available throughout

• Select "Log Out" under the

log out of the Portal

the Portal

4.2.2 Step 2: View the Welcome Page

	B Bob Roberts
ne	Pay Data Reports
W	elcome to the California Pay Data Reporting Portal
Calif Dep 2021	fornia law (Government Code §12999) requires employers with 100 or more employees to annually submit data on the pay, hours worked, and demographics of their employees to the California artment of Fair Employment and Housing (DFEH). For more information about this law and filing requirements, visit: www.dfeh.ca.gov/paydatareporting. The first filing deadline was March 31, 1, and annually thereafter on March 31.
Emp	ployers must use this portal to submit their pay data reports to DFEH. The high-level steps to submit the report are:
	Register and create a log-in to the portal. Provide employer demographic information. Provide pay data information in one of three ways: a. Upload Excel file. b. Upload. CSV c. Complete on-line forms
Prio pay	r to certification of a report, an employer may re-enter the portal to change their report using their login credentials. After certification, the employer can access a read-only version of their certified data reports. If an employer needs to revise information previously certified, the employer must start a new report and explain the correction in the remarks section of the report.
Instr	uctions are provided within the portal, in the user guide, and in the FAQs available at. www.dfeh.ca.gov/paydatareporting.
Vi	ew My Pay Data Reports
	Communication Center: 800-884-1684 (voice), 800-700-2320 (TTY) or California's Relay Service at 711 [paydatareportingg/dfeh.ca.gov



4.2.3 Step 3: View Pay Data Reports

Pay	Data Reports										
erify yo	our employer information below	v. If it is your first	time logging into the portal, y	ou can match with an exi	sting employer based on prio	r pay data reports o	r create a new Emp	loyer.			
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o conti	inue editing an existing pay dat	a report, click the	e "Pay Data Report Name" lini	k in the table below. Only	reports with a "New" status c	an be edited.					
eports	s that are not yet certified can b	e withdrawn at a	ny time. While viewing the rep	port, click the "Withdraw F	Report" button in the top-right	to update the report	t's status to "Withdra	awn".			
∕ly E	Employer: Acme W	ater Work	ks - Inc								
FEIN:	: 123456789				Address: 1234 Main Avenue,	Suite 500					
SEIN: DUN: NAIC	: 12345678 IS: 987654321 IS: 221310				Sacramento, CA 95	8250100					
SEIN: DUN: NAIC Edit	: 12345678 IS: 987654321 S: 221310 It Employer Information Itarta new Pay Data Report	With Me 🔻			Sacramento, CA 95i	8250100		O Saarch this list		*-	2
SEIN: DUN: NAIC Edit	1: 12345678 IS: 987654321 S: 221310 It Employer Information Natt a new Pay Data Report Data Reports Shared V Sorted by Pay Data Report Name + 1 Rep Data Report Name + 1	Nith Me 👻	ata reports • Updated a few second	ls ago	Sacramento, CA 954	2250100		Q. Search this list	SuchaBart	幸 -	C
SEIN: DUN: NAIC Edit Say D items •	1:12345678 IS: 987654321 IS: 921310 It Employer Information It Employer Information It a new Pay Data Report Data Reports Shared V Sorted by Pay Data Report Name + I Pay Data Report Na $\uparrow \checkmark$ PDRS-20210701-3	Nith Me	sta reports • Updated a few second	Is ago V Employer Name Acme Water Works	Sacramento, CA 954	 Employer FEIN 123456789 	✓ Reporting ✓ 2020	Q. Search this list Snapshot Perl ~ 10/16/2020	Snapshot Peri 10/31/2020	章 ·	C
SEIN: DUN: NAIC Edit	: 12345678 IS: 987654321 :S: 221310 It Employer Information It area new Pay Data Report Data Reports Shared V - Sorted by Pay Data Report Name • 1 Pay Data Report Na † ~ PDR5-20210701-3 PDR5-20210701-4	With Me 🗸	sta reports • Updated a few second v Account Acme Water Works - Inc Acme Water Works - Inc	Is ago Employer Name Acme Water Works Acme Water Works	Sacramento, CA 954	 Employer FEIN 123456789 123456789 	 ✓ Reporting ✓ 2020 2020 	Q. Search this list Snapshot Perl ↓ 10/16/2020 10/16/2020	Snapshot Peri 10/31/2020 10/31/2020	◆ ~ ~	C

The portal will display all pay data reports associated to the employer



4.2.4 Step 4: Forgotten Password

PASSWORD RESET
To reset your password, we'll need your username. We'll send password reset instructions to the email address associated with your account.
Lusername Reset Password B
Cancel





- Select "Reset Password"
- The Portal will send a verification link to the provided email address
- Open the email from California Pay Data Reporting System
- Follow the provided instructions and select the secure link



• If the password is found or should not be changed, select "Cancel"



Change Your Password	• Enter the New Password , verifying the security requirements are met • Re-enter the password in the
Enter a new password for Make sure to Include at leas:	Confirm New Password field The password must be at least 15 characters, include an uppercase letter, a lowercase letter, a number, and a special character Select "Change Password" to set the password for accessing the Portal
Password was last changed on 7/1/2021 6.24 PM. © 2021 www.dfeh.ca.gov. All rights reserved.	



5. Submitting the Pay Data Report

As discussed in section 2. Basic Structure of the California Pay Data Report, the pay data report consists of employer information, establishment information, and employee details. After a new report is created (Step 1), the employer information is entered (Step 2), followed by the establishment information and the employee details (Step 3). The report can then be certified (Step 4) or withdrawn at any time (Step 5).





5.1 Create a New Report

5.1.1 Step 1: Start a New Pay Data Report





- Select "Start a new Pay Data Report"
- The Start a new Pay Data Report popup will display



5.1.2 Step 2: Enter Required Information

			×	
Home Pay Data Reports	Start a new	Pav Data Report		
Pay Data Reports	Establishment and Employee Totals			
Verify your employer information below. If it is your firs	* Employer's Total California Establishments	* Employer's Total California Employees	a new Employer.	
To submit a Pay Data Report, click the "Start a new Pay Data)- to the Pay Data Reports table below. Click the "Pay Data Repo	* Employer's Total U.S. Establishments	• Employer's Total U.S. Employees	complete, click the "Next" button. A new report will be adde	d
To continue editing an existing pay data report, click the "Pay E				
Reports that are not yet certified can be withdrawn at any time.	Employer's Address If the employer is registered with EDD then ente	r the same address information below	; to "Withdrawn".	
My Employer: Acme Water Works - Ir	*Address Line 1			
FEIN: 123456789	Address Line 2			
SEIN: 12345678				
NAICS: 221310	City 0	•State		
		None		
Edit Employer Information	*ZIP Code	*Country Code		
Start a new Pay Data Report	After completing the required fields above click t	Next to create a draft Pay Data Report.		
	The new draft report will be displayed in the list(edited by first clicking on its name.	s) on the previous page and can be opened and		
Pay Data Reports Shared With Me 👻		\frown		
0 items • Sorted by Pay Data Report Name • Filtered by All pay data report		B	Q. Search this list	C
Pay Data Repor 🕇 🗸 Status 🗸 Accou	int 🗸 Employer Name 🗸 Emplo	yer CA SEIN 🗸 Employer FEIN 🗸 Reporting	g Year v Snapshot Period v Snapshot Period v	



Most fields throughout the portal include a "tool tip". This is a small pop up that displays when the cursor hovers over the ¹ icon to the right of the field name.

• Enter all required information in the pop up

 Required fields are denoted with a red asterisk (*) at the beginning of the field name



- After all information is entered, select "Next" to save the data
- The Portal will validate the entries just made
- If errors exist, an error message will display at the top of the page
- Navigate to the data field indicated in the error message and correct the data
- Repeat this step for all errors listed in the error message at the top of the page



5.1.3 Step 3: View New Report

		E BOO RODETS
me	Pay Data Reports	
Pay	Data Reports	
Verify	our employer information below. If it is your first time logging into the portal, you can match with an existing	ig employer based on prior pay data reports or create a new Employer.
To sub to the	mit a Pay Data Report, click the "Start a new Pay Data Report" button. You will be prompted to complete thr Pay Data Reports table below. Click the "Pay Data Report Name" link in the table to continue creating the re	re Section I: Employer Information data record. When complete, click the "Next" button. A new report will be added report.
To cor	tinue editing an existing pay data report, click the "Pay Data Report Name" link in the table below. Only report	ports with a "New" status can be edited.
Repor	s that are not yet certified can be withdrawn at any time. While viewing the report, click the "Withdraw Repo	ort" button in the top-right to update the report's status to "Withdrawn".
My	Employer: Acme Water Works - Inc	
FEII SEII DUI NAI	I: 123456789 I: 12345678 IS: 987654321 CS: 221310 It Employer Information	Address: 1234 Main Avenue, Suite 500 Sacramento, CA 958250100
	Start a new Pay Data Report	
Pay	Start a new Pay Data Report	Q. Search this list.
Pay 1 item	Start a new Pay Data Report Data Reports Shared With Me Sorted by Pay Data Report Name + Filtered by All pay data reports + Updated a few seconds ago	Q. Search this list



 The report name includes its creation date followed by a sequential number



 Select the Pay Data Report Name to continue the pay data report submission process



5.2 Enter Employer Information

5.2.1 Step 1: Report Navigation

Pay Data Reports			
Pay Data Report Submission Details			
-,			_
			Withdraw R
Step 1: Employer Information Step 2: Establishment & Empl	loyee Information Step 3: Certify and 9	Submit	
Employer Information			
Annually complete the Employer Information record below			
1. Click the pencil icon in any field to enter values.			
2. * indicates a required field.			
3. To save changes, select "Save".			
4. To reset data to the original values and NOT save change	ges, select "Cancel".		
5. When complete, click the "Step 2: Establishment & Emp	oloyee Information" tab at the top of the p	bage.	
6. To withdraw the report, click the "Withdraw Report" butto	on in the top-right of the page.		
Day Data Report Name		Status	
PDRS-20210701-3		New	
Submission Upload ID			
a2er000000015nWAAS			
Account		Employer DUNS Number	
Acme Water Works - Inc			
Employer Name Acme Water Works - Inc		Employer CA SEIN 12345678	
Is employer a contractor of the State of		Employer FEIN	
No	В	123456789	
Employer-Level Clarifying Remarks	$\overline{}$	Affiliated FEINs	
✓ Summary			
2020		No	
Snapshot Period Begin Date		Snapshot Period End Date	
10/16/2020		10/31/2020	
Employer's Total CA Establishments		Employer's Total CA Employees	
3		150	
Employer's Total U.S. Establishments		Employer's Total U.S. Employees	
3		150	
K EDD Address Information			
		EDD Address Line 20	
EDD Address Line 1		EDD Address Line 20	
EDD Address Line 1 1234 Main Avenue		Suite 500	
EDD Address Line 1 1234 Main Avenue EDD City		EDD Address Life 20	
EDD Address Line 1 EDD Address Line 1 I234 Main Avenue EDD City Sacramento		EDD Address the 20 Suite 500 EDD State CA	

- Each tab corresponds to a step required to complete the pay data report submission
- Clicking on a tab will display that step
- Enter all required information in the pop up
- Required fields are denoted with a red asterisk (*) at the beginning of the field name

Select the (pencil) icon to edit the page

• This is required to enter the employer information



- Select "Withdraw" to exit the report and set the status to withdrawn
- This can be selected at any time prior to the report being certified
- See <u>5.5 Withdrawing the Report</u> for details



5.2.3 Step 2: Enter Required Information

			😩 Bob Robert
e	Pay Data Reports		
Pav I	Data Report Submission Details		
,			
			Withdraw Report
Step 1:	: Employer Information Step 2: Establishment & Employee Information Step 3	3: Certify and Submit	
Empl	loyer Information		
2. * 3. To 4. To 5. W 6. To	indicates a required field. To save changes, select "Save". To reset data to the original values and NOT save changes, select "Cancel". When complete, click the "Step 2: Establishment & Employee Information" tab at 1 To withdraw the report, click the "Withdraw Report" button in the top-right of the particular to the second	the top of the page. age.	
Pay Dat PDRS-	ata Report Name •20210701-3	Status New	
Submis a2er00	ssion Upload ID 00000015nWAAS		
Accoun	nt	Employer DUNS Number	
Acme	Water Works - Inc		
*Emp	ployer Name 🕚	Employer CA SEIN	
		Cancel Save B	



the page
Required fields are denoted with a red asterisk (*) at the beginning of

the field name



- After all information is entered, select "Save" to save the data
- The Portal will validate the entries just made
- Select "Cancel" to revert all changes

!

Record the Submission Upload ID. It is used when importing a data file containing establishment information and employee detail records.



5.2.3 Step 3: Correct Data Errors

	Bob Roberts
Home Pay Data Reports	
Pay Data Report Submission Details	
	Withdraw Report
Step 1: Employer Info	
Employer Information	
Manually complete the Employer information record below. 1. Click the pencil icon in any field to enter values.	
2.* indicates a required field.	
3. To save changes, select "Save".	
 In reset data to the original values and NUT save changes, select "Cancel". When complete, click the "Step 2: Establishment & Employee Information" tab at the top of the page. 	
 To withdraw the report, click the "Withdraw Report" button in the top-right of the page. 	
Pay Data Bennt Name Status	
PDRS-20210701-3 New	
Submission Upload ID	
a2er0000000/5nWAAS	
Account Account	
A Review die tonowing redus A . Employer CA SEIN	
*Employer Name ①	5
Acme Water Works - Inc	
Cancel Save B	



- If the Portal identifies errors during validation, an error message will displays
- Navigate to the data field indicated in the error message and correct the data
- Repeat this step for all errors listed in the message on the page



- After all information is corrected, select "Save" to save the data
- The Portal will re-validate the entries just made



• Select "Step 2: Establishment & Employee Information" to continue with the report



5.3 Enter Establishment Information & Employee Detail

5.3.1 Option I: Create a Report by Uploading an Employer-Prepared Excel or .CSV File

Option I

Create a Report by Uploading Employer-Prepared File This option is for employers that choose to download and prepare the Pay Data Report template (Excel) or produce a .CSV file containing the information required in the Pay Data Report. For details on preparing the Excel or .CSV files, see: <u>Appendix A: Building the CA Pay Data Report Excel File</u> or <u>Appendix B: Building the CA Pay Data Report .CSV File</u>

The flow diagram below shows the steps in Option I. Detailed instructions for completing each step are provided on the following pages.



Step 5a describes how to use the Portal to correct data errors found in uploaded files. After corrections are made, employers are encouraged to download the updated data for their records (note that the Portal only provides Excel downloads).

Alternatively, employers can choose to fix data errors found by the Portal in their source files and then re-upload a corrected file. If so, Step 5 can be skipped, and instead, Step 6b should be performed to withdraw the erroneous file from the Portal.



5.3.1.1 Step 1: Prepare Excel or .CSV File

	Bob Roberts
lome Pay Data Reports	
Pay Data Report Submission Details	
	Withdraw Report
Step 1: Employer Information Step 2: Establishment & Employee Information Step 3: Certify and Submit	
Section II: Establishment Information & Employee Details	
Data records can be imported (suggested) or entered manually.	
Option 1: Import	
To import the data records, a prepared Excel or .CSV file can be used:	
1. Upload an Excel file	
a. Download the California Pay Data Report Template. b. Efficiency of the California Pay Data Report Template. b. Efficiency of the California Pay Data Report Template.	
c. Fill in the PayDatakepol. Worksheet onowing the isinulations provided in the template to create the Section in data records. c. Save the worksheet locally as a new Evrol Bit.	
d Unload the Excel file by selection "I logad Data File "	
 Edit the report as needed and correct any error identified by the portal's validation processes. 	
2. Upload a .CSV file	
a. Prepare a .CSV file with the required data (See detaild .CSV specification in the user guide). Example file.	
b. Upload the .CSV file by selecting "Upload Data File."	
c. Edit the report as needed and correct any errors identified by the portal's validation processes.	
3. When complete, click on move on the "Step 3: Certify and Submit" tab at the top of the page.	
To withdraw the report, click the "Withdraw Report" button in the top right corner of the page.	
A Download Template	
Section II Data Import	
B T. Upload Data File	



(Excel) on a local computer

- Fill in the required data consistent with the instructions provided in the template (and in Appendix A)
- Alternatively, employers can skip downloading the template and prepare a .CSV file consistent with the instructions in <u>Appendix B</u>



- The prepared Excel or .CSV file can be uploaded directly into the Portal
- Select "Upload Data File" to begin the process



5.3.1.2 Step 2: Obtain the Submission Upload ID

e Pay Data Reports		
Pay Data Report Submission Details	s	
	-	
\frown		Withdraw Report
(C)		
Step 1: Employer Information Step 2: Establishment & E	Employee Information Step 3: Certify and Submit	
Employer Information		
Manually complete the Employer Information record below	DW.	
1. Click the pencil icon in any field to enter values.		
2. * indicates a required field.		
 To serve above a serve a serve at BO servell 		
 To save changes, select "Save". To resolt data to the original values and NOT save classes. 	changes select "Cancel"	
 To save changes, select "Save". To reset data to the original values and NOT save checking the save checking the same same save checking the save checking the save save save save save save save sav	changes, select "Cancel". . Employee Information" tab at the top of the page	
 To save changes, select "Save". To reset data to the original values and NOT save cl When complete, click the "Step 2: Establishment & f To withdraw the report, click the "Withdraw Report" to 	changes, select "Cancel". 4 Employee Information" tab at the top of the page. * button in the top-right of the page.	
 To save changes, select "Save". To reset data to the original values and NOT save cl When complete, click the "Step 2: Establishment & I To withdraw the report, click the "Withdraw Report" to 	changes, select "Cancel". Employee Information" tab at the top of the page. button in the top-right of the page.	
 To save changes, select "Save". To reset data to the original values and NOT save cl 5. When complete, click the "Step 2: Establishment & t 6. To withdraw the report, click the "Withdraw Report" to Pay Data Report Name 	changes, select "Cancel". Employee Information" tab at the top of the page. button in the top-right of the page. Status	
 To save changes, select "Save". To reset data to the original values and NOT save ct 5. When complete, click the "Step 2: Establishment & t To withdraw the report, click the "Withdraw Report" to Pay Data Report Name PDBS-20210701-3 	changes, select "Cancel". Employee Information" tab at the top of the page. 'button in the top-right of the page. Status New	
To save changes, select "Save". A. To reset data to the original values and NOT save cl S. When complete, click the "Step 2: Establishment & t A. To withdraw the report, click the "Withdraw Report" t Pay Data Report Name PDR5-20210701-3 Submission Upload ID a2er0000001shWAAS	changes, select "Cancel". Employee Information" tab at the top of the page. 'button in the top-right of the page. Status New	
To save changes, select "Save". A. To reset data to the original values and NOT save cf S. When complete, click the "Step 2: Establishment & t A. To withdraw the report, click the "Withdraw Report" t Pay Data Report Name PDR5-20210701-3 Submission Uplaad ID a2er00000015nWAAS Account	changes, select "Cancel". Employee Information" tab at the top of the page. button in the top-right of the page. Status New Employer DUNIS Number	
To save changes, select "Save". A. To reset data to the original values and NOT save cf S. When complete, click the "Step 2: Establishment & t A. To withdraw the report, click the "Withdraw Report" t Pay Data Report Name PDR5-20210701-3 Submission Uplaat ID a2er0000000015nWAAS Account Account Account Account	changes, select "Cancel". 4 Employee Information" tab at the top of the page. * button in the top-right of the page. Status New Employer DUNIS Number	
To save changes, select "Save". A. To reset data to the original values and NOT save cf S. When complete, click the "Step 2: Establishment & t A. To withdraw the report, click the "Withdraw Report" t Pay Data Report Name PDRS-20210701-3 Submission Uplead ID a2er0000000015nWAAS Account Acc	changes, select "Cancel". 4 Employee Information" tab at the top of the page. * button in the top-right of the page. Status New Employer DUNS Number Employer CA SEIN	
To save changes, select "Save". A. To reset data to the original values and NOT save cf S. When complete, click the "Step 2: Establishment & t A. To withdraw the report, click the "Withdraw Report" t Pay Data Report Name PDRS-20210701-3 Submission Uplead ID a2er0000000015nWAAS Account Acme Water Works - Inc Employer Name	changes, select "Cancel". 4 Employee Information" tab at the top of the page. * button in the top-right of the page. Status New Employer DUNS Number Employer CA SEIN 12345678	
To save changes, select "Save". A. To reset data to the original values and NOT save cf. S. When complete, click the "Step 2: Establishment & f. To withdraw the report, click the "Withdraw Report" to Pay Data Report Name PDRS-20210701-3 Submission Uplead ID a2er00000005nWAAS Account Acme Water Works - Inc Employer Name Acme Water Works - Inc Is employer a contractor of the State of	changes, select "Cancel". & Employee Information" tab at the top of the page. * button in the top-right of the page. * butt	
To save changes, select "Save". A. To reset data to the original values and NOT save cf. S. When complete, click the "Step 2: Establishment & I or withdraw the report, click the "Withdraw Report" to Pay Data Report Name PDRS-20210701-3 Submission Uplad ID a2er00000005nWAAS Account Acme Water Works - Inc Imployer Name Report Name No	changes, select "Cancel". & Employee Information" tab at the top of the page. * button in the top-right of the page. * butt	
To save changes, select "Save". A. To reset data to the original values and NOT save cl S. When complete, click the "Step 2: Establishment & I Con withdraw the report, click the "Withdraw Report" to Pay Data Report Name PDRS-20210701-3 Submission Upload ID a2er00000005nWAAS Account Acme Water Works - Inc Employer Name Rome Vater Works - Inc Is employer a contractor of the State of No Employer-Level Clarifying Remarks	changes, select "Cancel". & Employee Information" tab at the top of the page. * button in the top-right of the page. * butt	





- The Portal assigns a unique Submission Upload ID for the report
- Copy this value as it will be required in the import data file for Establishment Information and Employee Detail records

(C		
	C)	

 After recording the Submission Upload ID, select "Step 2: Establishment& Employee Information from the tab bar



The Submission Upload ID value provided on Step 1: Employer Information is a required value for the import file to correctly process the establishment information and employee detail records. It is the unique identifier that links the imported records to the pay data report.



5.3.1.3 Step 3: Upload the Excel or .CSV File

	🕒 Bob Roberts
Home Pay Data Reports	
Pay Data Report Submission Details	
	Withdraw Report
Step 1: Employer Information Step 2: Establishment & Employee Information Step 3: Certify and Submit	
Section II: Establishment Information & Employee Details	
Data records can be imported (suggested) or entered manually.	
Option 1: Import	
To import the data records, a prepared Excel or .CSV file can be used:	
1. Upload an Excel file	
a. Download the California Pay Data Report Template.	
b. Fill in the "PayDataReport" worksheet following the isntructions provided in the template to create the Section II data records.	
c. Save the worksheet locally as a new Excel file.	
d. Upload the Excel file by selecting "Upload Data File."	
 e. Edit the report as needed and correct any error identified by the portal's validation processes. 	
2 upridud a USV life with the required data (See dataild, CSV specification in the user quide). Example file	
 a repaire a cost ne wint de require d'una (ces data cost apecincation in de del guide). Example ne. b Inhard the CSV file by calertine "Inhard bata File " 	
c optical the creater and opticating optication of the portal's validation processes	
3. When complete, click on move on the "Step 3: Certify and Submit" tab at the top of the page.	
4. To withdraw the report, click the "Withdraw Report" button in the top right corner of the page.	
Download Template	
Section II Data Import	
▲ Upload Data File	



- Select "Upload Data File" to begin the upload process
- The portal will display the managed import pop up



ection II: Establ	SimpleImport Managed Import	Start Again
tion 1: Import import the data record 1. Upload an Excel fill a. Download the b. Fill in the "Par- c. Save the wor d. Upload the Es- a. Edit the report 2. Upload a. CSV file a. Prepare a. CS b. Upload the CC c. Edit the report	CA Upload File or Drop File	
 When complete, cli To withdraw the rep 		Done



- Select "Upload File"
- The Portal will then issue a prompt to identify the locally stored Excel file to be uploaded
- Alternatively, the import file can simply be dragged and dropped into the pop up



cords can be imp	SimpleImport Managed Import			Start Again
ort the dat		Processed	Impofixing	Finished
a Download the b. Fill in the "Pay	Copy of SimpleImport Template File.xlsx 34.6 KB	-		(v)
c. Save the work d. Upload the Ex			0	
a. Prepare a CS b. Upload the .C c. Edit the repor				
hen complete, cli withdraw the rep				Done



The time it takes for the portal to complete the import process depends on the number of records in the import file. It is recommended that users leave this pop up open until the process is finished.



- The portal displays the current file import status as stages
- The Uploaded status indicates the import file has been uploaded into the portal
- The Processed status indicates that the file is the correct type and its structure is valid
- The Imported status indicates that the data records have been inserted into the pay data report



ion II: Establ	SimpleImport Managed Import		_	Start Again
n 1: Import	obiososo	NOC69256	nuberreg	Finished
pload an Excel file a. Download the b. Fill in the "Pat c. Save t	Copy of SimpleImport Template File.x 34.6 KB	lsx		Revert 🔻 🖪
e. Edit the Upload a .CSV file	Inserted 3 Establishment Information 10 Emp	ployee Details 1 Error		ی Download success the
a. Prepare a .C5 b. Upload the .C c. Edit the repor				
o withdraw the rep				Done



- The portal displays the results of the import process, including summary of all inserted records
- The portal also displays the total errors



- Select "Revert" to undo all changes
- This removes all records inserted into the pay data report
- Select "Download success file" to view all successfully inserted records
- Select "Download error file" to view all errors encountered by the portal during the upload process (see Step <u>5</u> for details)





5.3.1.4 Step 4: Review Pay Data Report

Fasabilishara at Mana	Establishment ID	Change & didage	Chu	
Establishment Name	Establishment ID	Street Address	City	
Acme Water Works - Inc - Station 1000 (AB66242)	1234567	1234 Main Avenue	Sacramento	•
Acme Water Works - Inc - Station 2000 (AB66243)	7654321	505 Crocker Avenue	Rocklin	
Acme Water Works - Inc - Station 3000 (AB66244)	1231231	444 North 54th Street	Reno	¥
				View All
E Sanalana Baballa (Sa)				New
Employee Details (6+)				THEAV
Employee Details (6+)	Establishment Name	Job Category	Pay Band	INCOV
Employee Details (6+) Employee Detail Name PDED0008841	Establishment Name Acme Water Works - Inc - Station 1000 (AB66242)	Job Category 1 - Executive senior level officials and managers	Pay Band 11 - \$163,800 - \$207,999	v
Employee Details (6+) Employee Detail Name PDED0008841 PDED0008842	Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242)	Job Category 1 - Executive senior level officials and managers 2 - First or mid-level officials and managers	Pay Band 11 - \$163.800 - \$207,999 10 - \$128,960 - \$163,799	
Employee Details (6+) Employee Details (6+) PDED0008841 PDED0008842 PDED0008843	Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242)	Job Category 1 - Executive senior level officials and managers 2 - First or mid-level officials and managers 2 - First or mid-level officials and managers	Pay Band 11 - \$163,800 - \$207,999 10 - \$128,960 - \$163,799 10 - \$128,960 - \$163,799	() EV
Employee Details (6+) Employee Details (6+) Employee Details (6+) PDED0008841 PDED0008842 PDED0008843 PDED0008844	Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242)	Job Category 1 - Executive senior level officials and managers 2 - First or mid-level officials and managers 2 - First or mid-level officials and managers 5 - Sales workers	Pay Band 11 - \$163,800 - \$207,999 10 - \$128,960 - \$163,799 10 - \$128,960 - \$163,799 8 - \$80,080 - \$101,919	V V
Employee Details (6+) Employee Details (6+) Employee Details (6+) PDED0008841 PDED0008842 PDED0008843 PDED0008844 PDED0008845	Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242)	Job Category 1 - Executive senior level officials and managers 2 - First or mid-level officials and managers 2 - First or mid-level officials and managers 5 - Sales workers 5 - Sales workers	Pay Band 11 - \$163,800 - \$207,999 10 - \$128,960 - \$163,799 10 - \$128,960 - \$163,799 8 - \$80,080 - \$101,919 8 - \$80,080 - \$101,919	Vev V V
Employee Details (6+) Employee Details (6+) Employee Details (6+) PDED0008841 PDED0008842 PDED0008843 PDED0008844 PDED0008845 PDED0008846	Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 2000 (AB66243)	Job Category 1 - Executive senior level officials and managers 2 - First or mid-level officials and managers 2 - First or mid-level officials and managers 5 - Sales workers 5 - Sales workers 4 - Technicians	Pay Band 11 - \$163,800 - \$207,999 10 - \$128,960 - \$163,799 10 - \$128,960 - \$163,799 8 - \$80,080 - \$101,919 8 - \$80,080 - \$101,919 9 - \$101,920 - \$128,959	V V V V V



- The portal displays the imported Establishment Information records towards the bottom of the page
- Review the records to ensure they imported as expected
- Select an Establishment Name to view the record's detailed information, including all associated Employee Detail records for the establishment

$\overline{\mathbf{O}}$

- The portal displays the imported Employee Detail records at the bottom of the page
- Review the records to ensure they imported as expected
- Select an Employee Detail Name to view the record's detailed information, including the associated establishment



5.3.1.5 Step 5: Correct Data Errors





- The column entitled SimpleImport: error displays the error
- In the screenshot, the error is stating that the Submission Upload ID is not valid and the record was not imported
- This can be corrected manually (see Option II, <u>Step 2</u>) or by correcting the import file and reuploading it (see <u>Step 3</u>)



5.3.2 Option II: Create a Report by Using the Portal's Fillable Forms

Option II Create a Report by Using the Portal's Fillable Forms

Instead of creating an Excel or .CSV file with the employer's data and uploading that file to the Portal (Option 1), an employer may use the online fillable forms available in the Portal to manually enter the Pay Data Report information.

The flow diagram below shows the steps required to manually create a Pay Data Report using Option II. Detailed instructions for completing each step are provided on the following pages.



When filling in the online forms at Steps 5 and 6, follow the instructions for each data field provided in the Pay Data Report template (Excel) or this user guide's Appendix B.



5.3.2.1 Step 1: Report Navigation

		🕒 Bob Rober
lome	Pay Data Reports	
Pay	Data Report Submission Details	
		Withdraw Doport
		www.norawikeport
	\frown	
Step 1	Employer Infl A Step 2: Establishment & Employee Information Step 3: Certify and Submit	
Sect	tion II: Establishment Information & Employee Details	
Data n	ecords can be imported (suggested) or entered manually.	
Optio	on 2: Manual Entry	
To crea	ate the data records manually, enter the Establishment Information and associate it to all applicable Employee Detail Records:	
1. E	Inter the Establishment Information:	
	a in the Establishment information in the fillable form available within the portal to create the Establishment Information Record.	
	c. When entering the required information online, follow the instructions provided in the California Pay Data Report Template or the user guide's Appendix B.	
	d. Edit the report as needed and correct any errors identified by the portal's validation processes.	
	e. Cancel /Save & New / Save.	
2. 6	Inter the Employee Detail: In the Remolevee Detail: Widget click the "New" button	
	a in the Employee Details Wroget, click the Here Volution. b. Select the Establishment Name the Employee Detail record is associate to.	
	c. Enter the required information in the fillable form available within the portal to create the Employee Detail record.	
	d. When entering the required information online, follow the instructions provided in the California Pay Data Report Template or the user guide's Appendix B.	
	 Edit the report as needed and correct any errors identified by the portal's validation processes. 	
21	I. Cancel / Save & new / Save Near competition, navinget to the "Step 3: Contifu and Submit" tak at the top of the page	
4. 1	Men comprese, mangate or the post certain and scotting and scotting and scotting post or page.	
	Establishment Information (0)	
		$\tilde{\mathbf{A}}$
0	Employee Details (0)	CNew



Pay data reports cannot be certified until a complete Establishment Information record and a complete Employee Detail record have been added to the report.



- Each tab corresponds to a step required to complete the pay data report submission
- Clicking on a tab will display that step



- In the Establishment Information grid, select "New" to create an establishment
- The New Establishment Information pop up displays
- This is required to certify a report
- See Step 2 for details



- In the Employee Details grid, select "New" to create an employee detail record
- The New Employee Detail pop up displays
- This is required to certify a report
- See Step 3 for details



5.3.2.2 Step 2: Enter Establishment Information

	New Establish	ment Information	
	Information		
ption 2: Manual Entry	Information		
o create the data records manually, e	*Pay Data Report		
1. Enter the Establishment Inform	PDRS-20210701-4 ×		
 b. Enter the required information c. When entering the required in 	Establishment Name and Address		tix B.
d. Edit the report as needed and	*Establishment Name	•Headquarters	
e. Cancel /Save & New / Save.		None 🔻	
2. Enter the Employee Detail:			
a. In the Employee Details Widg			
b. Select the Establishment Nam	* Street Address	Street Address 2	
c. Enter the required information			
d. when entering the required in	* cia:	State	лх В.
e. Edit the report as needed and	City		
2 When complete paviante to the "St		None +	
4. To withdraw the report click the "M	* ZIP Code		
4. To windraw the report, click the W			
Establishment Information (0	Establishment Details		New
	* Pay Data Report Submitted in Prior Year? 🕚		
	No	•	
Employee Details (0)		B Cancel Save & New Save	New
		\sim	



- Enter all required information in the New Establishment Information pop up
- Required fields are denoted with a red asterisk (*) at the beginning of the field name



- After all information is entered, select "Save" to save the data
- The Portal will validate the entries just made
- If errors exist, an error message will display at the top of the page
- Navigate to the data field indicated in the error message and correct the data
- Repeat this step for all errors listed in the error message at the top of the page
- Select "Cancel" to revert all changes
- Select "Save & New" to display a new pop up to create an additional establishment



5.3.2.3 Step 3: Enter Employee Details

Section II Data Import		
	New Employee Detail	
Option 2: Manual Entry	Information	
o create the data records manually, enter 1. Enter the Establishment Information	Employee Detail Name	
 a. In the Establishment Information b. Enter the required information 	Pay Data Report PDR5-20210701-4	
c. When entering the required in		lix B.
e. Cancel /Save & New / Save	Required Information *Establishment Name	
2. Enter the Employee Detail: a. In the Employee Details I	Search Establishment Information Q	
 b. Select the Establishment Nation c. Enter the required information 	• Job Category ①	
d. When entering the required in	Pay Band 1	tix B.
e. Edit the report as needed and f. Cancel / Save & new / Save	None	
 When complete, navigate to the "St To withdraw the report, click the "W 	Race/Ethnicity/Sex	
	*Total Number of Employees	
Establishment Information (0		New
	Total Hours 😈	
C Employee Details (0)	B Cancel Save & New Save	e New
	Communication Center: 800-884-1684 (volce), 800-700-2320 (TTY) or California's Palay Sandre at 211 Long data segond heitid tables any	



Employee detail records are associated to a specific establishment. Previously entered establishments can be selected in the **Establishment Name** field. Therefore, it is possible for nearly identical employee detail records to exist where the Job Category, Pay Band, and Race/Ethnicity/Sex fields are the same while the establishment the record is associated to is different. Enter all required information in the New Establishment Information pop up

 Required fields are denoted with a red asterisk (*) at the beginning of the field name



- After all information is entered, select "Save" to save the data
- The Portal will validate the entries just made
- If errors exist, an error message will display at the top of the page
- Navigate to the data field indicated in the error message and correct the data
- Repeat this step for all errors listed in the error message at the top of the page
- Select "Cancel" to revert all changes
- Select "Save & New" to display a new pop up to create an additional employee detail record



5.3.2.4 Step 4: Correct Data Errors

	New Employee Detail			
ption 2: Manual Entry	Review the errors on this page.			
a create the data records manually, onto 1. Enter the Establishment Information a. In the Establishment Information	These required fields must be completed: Job Category, Total Number of Employees, Race/Ethnicity/Sex, Total Establishment Name	Hours,		
 b. Enter the required information c. When entering the required in 	Information		tix B.	
d. Edit the report as needed and e. Cancel /Save & New / Save.	Employee Detail Name			
2. Enter the Employee Detail: a. In the Employee Details Widg b. Select the Establishment Nam	Pay Data Report PDRS-20210701-4			
 c. Enter the required information d. When entering the required in 	Required Information		tix B.	
e. Edit the report as needed and	Establishment Name			
f. Cancel / Save & new / Save	Search Establishment Information	Q		
3. When complete, navigate to the "St	Complete this field.			
4. To withdraw the report, click the "W	Job Category 0			
	None	*		
Establishment Information (0	Complete this field.			New
_	Pay Band 🔕			
	None	-		
Employee Details (0)	Cancel	Save & New Se	аче В	New
	Communication Center: 800-884-1684 (voice), 800-700-2320 (TTY) or			



- If the Portal identifies errors during validation, an error message will display at the top of the page
- Navigate to the data field indicated in the error message and correct the data
- Repeat this step for all errors listed in the message on the page



- After all information is corrected, select "Save" to save the data
- The Portal will re-validate the entries just made

California Pay Data Reporting Portal – User Guide



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Pay Data Reports				
ay Data Report Submission	Details			
				Withdraw Report
	\frown			
p 1: Employer Information Step 2: Establi	ishment & Employee Inf A Step 3: Cert	ify and Submit		
ection II: Establishment Inform	nation & Employee Details			
ta records can be imported (suggested) or e	entered manually.			
 Create the data records manually, enter the 1. Enter the Establishment Information: a. In the Establishment Information in th c. Enter the required information in th c. When entering the required informat d. Edit the report as needed and corre e. Cancel /Save & New / Save. 2. Enter the Employee Detail: a. In the Employee Details Widget, clip. b. Select the Establishment Neme the 	Establishment Information and associate it to a /idget, click the "New" button. e fillable form available within the portal to creat ation online, follow the instructions provided in th ect any errors identified by the portal's validation ick the "New" button. e Employee Detail record is associate to.	II applicable Employee Detail Records: e the Establishment Information Record. le California Pay Data Report Template or the o processes.	user guide's Appendix B.	
Concer the required information in th d. When entering the required information e. Edit the report as needed and correr f. Cancel / Save & new / Save When complete, navigate to the "Step 3: A. To withdraw the report, click the "Withdra Establishment Information (7)	e fillable form available within the portal to creat ation online, follow the instructions provided in the ect any errors identified by the portal's validation Certify and Submit" tab at the top of the page. aw Report" button in the top-right of the page.	e the Employee Detail record. le California Pay Data Report Template or the u processes.	user guide's Appendix B.	New
Concer the required information in th d. When entering the required information e. Edit the report as needed and correc f. Cancel / Save & new / Save When complete, navigate to the "Step 3: 4. To withdraw the report, click the "Withdra Establishment Information (3)	e fillable form available within the portal to creat ation online, follow the instructions provided in th ect any errors identified by the portal's validation Certify and Submit" tab at the top of the page. aw Report" button in the top-right of the page.	e the Employee Detail record. le California Pay Data Report Template or the u processes.	user guide's Appendix B.	New
a. Solide the required information in the c. Enter the required information in th d. When entering the required inform e. Edit the report as needed and correc f. Cancel / Save & new / Save 3. When complete, navigate to the "Step 3: 4. To withdraw the report, click the "Withdra Establishment Information (3) Establishment Name	e fillable form available within the portal to creat ation online, follow the instructions provided in th ect any errors identified by the portal's validation Certify and Submit" tab at the top of the page. aw Report" button in the top-right of the page. Establishment ID	e the Employee Detail record. Ie California Pay Data Report Template or the u processes. Street Address	user guide's Appendix B.	New
Construct the required information in th d. When entering the required information e. Edit the report as needed and correc f. Cancel / Save & new / Save When complete, navigate to the "Step 3: 4. To withdraw the report, click the "Withdra Establishment Information (3) Establishment Name Acme Water Works - Inc - Station 1000 (AB66242)	e fillable form available within the portal to creat ation online, follow the instructions provided in th ect any errors identified by the portal's validation Certify and Submit' tab at the top of the page. aw Report' button in the top-right of the page. Establishment ID 1234567	e the Employee Detail record. Iee California Pay Data Report Template or the u processes. Street Address 1234 Main Avenue	user guide's Appendix B.	New
Conset the required information in th C. Enter the required information in th d. When entering the required information t. Cancel / Save & new / Save When complete, navigate to the "Step 3: When complete, navigate to the "Step 3: A To withdraw the report, click the "Withdra Establishment Information (3) Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 2000 (AB66243)	e fillable form available within the portal to creat ation online, follow the instructions provided in th ext any errors identified by the portal's validation Certify and Submit" tab at the top of the page. w Report" button in the top-right of the page. Establishment ID 1234567 7654321	e the Employee Detail record. Iee California Pay Data Report Template or the u processes. Street Address 1234 Main Avenue 505 Crocker Avenue	user guide's Appendix B. City Sacramento Rocklin	New
Conset the required information in th C. Enter the required information in th d. When entering the required information t. Cancel / Save & new / Save When complete, navigate to the "Step 3: When complete, navigate to the "Step 3: A. To withdraw the report, click the "Withdra Establishment Information (3) Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 3000 (AB66244) Acme Water Works - Inc - Station 3000 (AB66244)	e fillable form available within the portal to creat tation online, follow the instructions provided in th ext any errors identified by the portal's validation Certify and Submit" tab at the top of the page. we Report" button in the top-right of the page. Establishment ID 1234567 7654321 1231231	e the Employee Detail record. Iee California Pay Data Report Template or the u processes. Street Address 1234 Main Avenue 505 Crocker Avenue 444 North 54th Street	user guide's Appendix B. City City Sacramento Rocklin Reno	New
Construct the required information in th d. When entering the required information in th d. When entering the required information e. Edit the report as needed and corre t. Cancel / Save & new / Save 3. When complete, navigate to the "Step 3: 4. To withdraw the report, click the "Withdra Establishment Information (3) Establishment Name Arme Water Works - Inc - Station 3000 (AB66244) Arme Water Works - Inc - Station 3000 (AB66244)	e fillable form available within the portal to creat ation online, follow the instructions provided in th eact any errors identified by the portal's validation Certify and Submit" tab at the top of the page. w Report" button in the top-right of the page. Establishment ID 1234567 7654321 1231231	e the Employee Detail record. tee California Pay Data Report Template or the u processes. Street Address 1234 Main Avenue 505 Crocker Avenue 444 North 54th Street	user guide's Appendix B. City Sacramento Rocklin Reno	New View All
C. Enter the required information in th d. When entering the required information e. Edit the report as needed and correc- t. Cancel / Save & new / Save 3. When complete, navigate to the "Step 3: 4. To withdraw the report, click the "Withdray Establishment Information (3) Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 3000 (AB66244) Complexed Details (6+)	e fillable form available within the portal to creat ation online, follow the instructions provided in the ect any errors identified by the portal's validation Certify and Submit" tab at the top of the page. aw Report" button in the top-right of the page. Establishment ID 1234567 7654321 1231231	e the Employee Detail record. lee California Pay Data Report Template or the u processes. Street Address 1234 Main Avenue 505 Crocker Avenue 444 North 54th Street	user guide's Appendix B. City City Sacramento Rocklin Reno	New View All
Conset the required information in th C. Enter the required information in th d. When entering the required information t. Cancel / Save & new / Save When complete, navigate to the "Step 3: A. To withdraw the report, click the "Withdra Establishment Information (3) Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 3000 (AB66244) Complete Details (6+) Employee Detail Name	e fillable form available within the portal to creat ation online, follow the instructions provided in th ect any errors identified by the portal's validation Certify and Submit" tab at the top of the page. aw Report" button in the top-right of the page. Establishment ID 1234567 7654321 1231231	e the Employee Detail record. lie California Pay Data Report Template or the u processes. Street Address 1234 Main Avenue 505 Crocker Avenue 444 North 54th Street Job Category	user guide's Appendix B. City City Sacramento Rocklin Reno Pay Band	New View All
C. Enter the required information in th d. When entering the required information t. Cancel / Save & new / Save 3. When complete, navigate to the "Step 3: 4. To withdraw the report, click the "Withdre Establishment Information (3) Establishment Information (3) Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 3000 (AB66244) Complexed Details (6+) Employee Details (6+) Employee Details Name	e fillable form available within the portal to creat ation online, follow the instructions provided in th ect any errors identified by the portal's validation Certify and Submit" tab at the top of the page. aw Report" button in the top-right of the page. Establishment ID 1234567 7654321 1231231 Establishment Name Acme Water Works - Inc - Station 1000 (AB66242)	e the Employee Detail record. lie California Pay Data Report Template or the u processes. Street Address 1234 Main Avenue 505 Crocker Avenue 444 North 54th Street Job Category 1 - Executive senior level officials and managers	user guide's Appendix B. City City Sacramento Rocklin Reno Pay Band 11 - \$163,800 - \$207,999	New View All
C. Enter the required information in th d. When entering the required information t. Cancel / Save & new / Save 3. When complete, navigate to the "Step 3: 4. To withdraw the report, click the "Withdre Establishment Information (3) Establishment Information (3) Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 3000 (AB66244) C Employee Details (6+) Employee Details (6+) Employee Details Mame PDED3569861 PDED3569862	e fillable form available within the portal to creat ation online, follow the instructions provided in th eact any errors identified by the portal's validation Certify and Submit" tab at the top of the page. w Report" button in the top-right of the page. Establishment ID 1234567 7654321 1231231 Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242)	e the Employee Detail record. lee California Pay Data Report Template or the u processes. Street Address 1234 Main Avenue 505 Crocker Avenue 444 North 54th Street Job Category 1 - Executive senior level officials and managers 2 - First or mid-level officials and managers	user guide's Appendix B. City Sacramento Rocklin Reno Pay Band 11 - \$163,800 - \$207,999 10 - \$128,960 - \$163,799	New View All
C. Enter the required information in th d. When entering the required information in th d. When entering the required information i. Cancel / Save & new / Save / Save &	e fillable form available within the portal to creat ation online, follow the instructions provided in th eact any errors identified by the portal's validation Certify and Submit" tab at the top of the page. w Report" button in the top-right of the page. Establishment ID 1234567 7654321 1231231 Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242)	e the Employee Detail record. tee California Pay Data Report Template or the u processes. Street Address 1234 Main Avenue 505 Crocker Avenue 444 North 54th Street 444 North 54th Street Job Category 1 - Executive senior level officials and managers 2 - First or mid-level officials and managers 2 - First or mid-level officials and managers	user guide's Appendix B. City Sacramento Rocklin Reno Pay Band 11 - \$163,800 - \$207,999 10 - \$128,960 - \$163,799 10 - \$128,960 - \$163,799	New View All
Conset the required information in th C. Enter the required information in th d. When entering the required information t. Cancel / Save & new / Save S. When complete, navigate to the "Step 3: A. To withdraw the report, click the "Withdre Establishment Information (3) Establishment Information (4) Establishm	e fillable form available within the portal to creat ation online, follow the instructions provided in th act any errors identified by the portal's validation Certify and Submit" tab at the top of the page. w Report" button in the top-right of the page. Establishment ID 1234567 7654321 1231231 Establishment Name Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242)	e the Employee Detail record. tee California Pay Data Report Template or the u processes. Street Address 1234 Main Avenue 505 Crocker Avenue 444 North 54th Street Job Category 1 - Exacutive senior level officials and managers 2 - First or mid-level officials and managers 2 - First or mid-level officials and managers 5 - Sales workers	User guide's Appendix B. City Sacramento Rocklin Reno Pay Band 11 - \$163,800 - \$207,999 10 - \$128,960 - \$163,799 10 - \$128,960 - \$163,799 10 - \$128,960 - \$163,799 8 - \$80,080 - \$101,719	New View All
Conset the required information in th C. Enter the required information in th d. When entering the required information e. Edit the report as needed and correr f. Cancel / Save & new / Save S. When complete, navigate to the "Step 3: A. To withdraw the report, click the "Withdre S. When complete, navigate to the "Step 3: A. To withdraw the report, click the "Withdre Establishment Information (3) Establishment Information (3) Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 3000 (AB66243) Acme Water Works - Inc - Station 3000 (AB66244) PDED356964 PDED356964 PDED356964 PDED356964	e fillable form available within the portal to creat ation online, follow the instructions provided in th act any errors identified by the portal's validation Certify and Submit" tab at the top of the page. w Report" button in the top-right of the page. Establishment ID 1234567 7654321 1231231 Establishment Name Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242)	e the Employee Detail record. tee California Pay Data Report Template or the u processes. Street Address 1234 Main Avenue 505 Crocker Avenue 444 North 54th Street Job Category 1 - Executive senior level officials and managers 2 - First or mid-level officials and managers 3 - Sales workers 5 - Sales workers	user guide's Appendix B. City Sacramento Rocklin Reno Pay Band 11 - \$163,800 - \$207,999 10 - \$128,960 - \$163,799 10 - \$128,960 - \$163,799 10 - \$128,960 - \$163,799 8 - \$80,080 - \$101,919 8 - \$80,080 - \$101,919	New View All
C. Enter the required information in th d. When entering the required information in th d. When entering the required information i. Cancel / Save & new / Save 3. When complete, navigate to the "Step 3: 4. To withdraw the report, click the "Withdra 5. Establishment Information (3) 5. Establishment Information (3) 5. Establishment Information (3) 5. Establishment Information (3) 5. Employee Details (6+) 5. Employee De	e fillable form available within the portal to creat ation online, follow the instructions provided in th act any errors identified by the portal's validation Certify and Submit" tab at the top of the page. w Report" button in the top-right of the page. Establishment ID 1234567 7654321 1231231 Establishment Name Acme Water Works - Inc - Station 1000 (AB66242) Acme Water Works - Inc - Station 1000 (AB66242)	e the Employee Detail record. tee California Pay Data Report Template or the u processes. Street Address 1234 Main Avenue 505 Crocker Avenue 444 North 54th Street Job Category 1 - Exacutive senior level officials and managers 2 - First or mid-level officials and managers 2 - First or mid-level officials and managers 5 - Sales workers 5 - Sales workers 4 - Technicians	user guide's Appendix B. City Sacramento Rocklin Reno Pay Band 11 - \$163,800 - \$207,999 10 - \$128,960 - \$163,799 10 - \$128,960 - \$163,799 8 - \$50,080 - \$101,919 8 - \$50,080 - \$101,919 9 - \$101,920 - \$128,959	New View All New Vew View Control of the control of



- Select "Step 3: Certify and Submit" to continue with the report
- See <u>5.4 Certifying the Report</u> for details



5.4 Certifying the Report

5.4.1 Step 1: Enter Report Contact Information







When selecting "Certify and Submit" the portal conducts an audit to confirm that at least one Establishment information record and one Employee Detail record have been added to the report. If the condition is not met, select "X" and refer to <u>5.3 Enter Establishment Information & Employee</u> Details.

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			× Bob Roberts
Home Pay Data Reports	Certificatio	n & Submission	
Pay Data Report Submission Detai	Please enter the contact information of the indiv this is you, please re-enter your information belo * First Name	idual that can be contacted regarding this report. If w	Withdraw Report
Step 1: Employer Information Step 2: Establishment 6	*Last Name		
Once your report is final and ready for submission, an a clicking the "Certify and Submit" button below.	* Title		id prepared in accordance with the instructions by
Once certified, you will no longer be able to revise applicable remarks field(s).	* Phone (555) 123-4567	Email Address certifier@example.com	e corrected report, explaining the correction(s) in the
To withdraw the report, click the "Withdraw Report" but!	* Street Address		
Certify and Submit			
	*City 🕚	*State O	
	* Zip/Postal Code		

• Enter all required information in the

- Certification & Submission pop upRequired fields are denoted with a
- red asterisk (*) at the beginning of the field name



- After all information is entered, select "Next" to save the data
- The Portal will validate the entries just made
- If errors exist, an error message will display at the top of the page
- Navigate to the data field indicated in the error message and correct the data
- Repeat this step for all errors listed in the error message at the top of the page



5.4.2 Step 2: Enter Certifying Official Information

			×	Bob Roberts
Home Pay Data Reports	Certificatio	n & Submission		
Pay Data Report Submission Detai	*Is the Person to Contact regarding this report also No, it is a different person Yes, it is the same person *First Name	o the Person Certifying it?		Withdraw Report
Step 1: Employer Information Step 2: Establishment &	*Last Name			
Once your report is final and ready for submission, an clicking the "Certify and Submit" button below.	*Title		to prepared in accordance with the	correction(s) in the
applicable remarks field(s).	* Dhope	Email Address	te conected report, explaining the	conscion(s) in the
To withdraw the report, click the "Withdraw Report" but	(555) 123-4567	certifier@example.com		
Certify and Submit	* Street Address			
	City	•State		
	*Zip/Postal Code	B		
		Previous		

• Indicate if the certifying official is the same as the report contact

- If "No" is selected, enter all required information in the Certification & Submission pop up
- Required fields are denoted with a red asterisk (*) at the beginning of the field name



- After all information is entered, select "Next" to save the data
- The Portal will validate the entries just made
- If errors exist, an error message will display at the top of the page
- Navigate to the data field indicated in the error message and correct the data
- Repeat this step for all errors listed in the error message at the top of the page
- Select "Previous" to edit the contact information

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 Indicate if the certifying official is the same as the report contact



- If "Yes" is selected above, select "Next" to save the data
- Select "Previous" to edit the contact information



5.4.3 Step 3: Enter Optional Remarks and Certify



 Enter any remarks or notes about the pay data report



- Select "Next" to certify the report
- Select "Previous" to edit the certifying official information

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5.5 Withdrawing the Report

Pay Data Report Submission Details		
		•
		Withdraw Report
		•
Step 1: Employer Information Step 2: Establishment & Employee In	nformation Step 3: Certify and Submit	
Employer Information		
vanually complete the Employer Information record below.		
1. Click the pencil icon in any field to enter values.		
* indicates a required field.		
3. To save changes, select "Save".		
 Io reset data to the original values and NOT save changes, set When complete disk the "Step 2: Establishment & Employee II 	lect "Cancel".	
 when complete, click the Step 2. Establishment & Employee II To withdraw the report, click the "Withdraw Report" button in the 	ntormation tablat the top of the page.	
o, to windraw the report, click the windraw Report button in the	e top-ngint of the page.	
Pay Data Report Name	Status	
PDRS-20210701-3	New	
Submission Upload ID		
a2er000000015nWAAS		
Account Acres Water Works - Inc	Employer DUNS Number 🚯	
	England A CENT	
Acme Water Works - Inc	12345678	
Is employer a contractor of the State of	Employer FEIN	
Is employer a contractor of the State of No	Employer FEIN 123456789	
Is employer a contractor of the State of No Employer-Level Clarifying Remarks	Employer FEIN® 123456789 Affiliated FEIN®	
Is employer a contractor of the State of No Employer-Level Claritying Remarks	Employer FEIN 123456789 Affiliated FEINs	
Is employer a contractor of the State of No Employer-Level Clarifying Remarks V Summary	Employer FEIN® 123456789 Atfiliated FEIN®	
Is employer a contractor of the State of No Employer-Level Clarifying Remarks Summary Reporting Year	Employer FEIN® 123456789 Affiliated FEIN®	
Is employer a contractor of the State of No Employer-Level Clarifying Remarks	Employer'FEIN® 123456789 Affiliated FEIN® Employer's Ownership® No	
Is employer a contractor of the State of No Employer-Level Clarifying Remarks	Employer FEIN® 123456789 Affiliated FEIN® Employer's Ownership® No Snapshot Period End Date®	
Is employer a contractor of the State of No Employer-Level Claritying Remarks	Employer's Ownership Employer's Ownership No Snapshot Period End Date 10/31/2020	
Is employer a contractor of the State of No Employer-Level Claritying Remarks	Employer FEIN® 123456789 Affiliated FEIN® Employer's Ownership® No Snapshot Period End Date® 10/31/2020 Employer's Total CA Employees®	
Is employer a contractor of the State of No Employer-Level Clarifying Remarks	Employer FEIN® 123456789 Affiliated FEIN® Employer's Ownership® No Snapshot Period End Date® 10/31/2020 Employer's Total CA Employees® 150	
Is employer a contractor of the State of No Employer-Level Clarifying Remarks	Employer FEIN®	
Is employer a contractor of the State of No Employer-Level Clarifying Remarks	Employer FEIN® 122456789 Arfiliated FEIN® Employer's Ownership® No Snapshot Period End Date® 10/31/2020 Employer's Total CA Employees® 150 Employer's Total U.S. Employees® 150 Employer's Total U.S. Employees® 150	
Is employer a contractor of the State of No Employer-Level Clarifying Remarks	Employer FEIN® 123456789 Arfiliated FEIN® Employer's Ownership® No Snapshot Period End Date® 10/31/2020 Employer's Total CA Employees® 150 Employer's Total U.S. Employees® 150	
Is employer a contractor of the State of No Employer-Level Claritying Remarks	Employer FEIN® 122456789 Affiliated FEIN® Employer's Ownership® No Snapshot Period End Date® 10/312/020 Employer's Total CA Employees® 150 Employer's Total U.S. Employees® 150 EDD Address Line 2®	
Is employer a contractor of the State of No Employer-Level Claritying Remarks	Employer FEIN® 123456789 Arfiliated FEIN® Employer's Ownership® No Snapshot Period End Date® 10/31/2020 Employer's Total CA Employees® 150 Employer's Total U.S. Employees® 150 EDD Address Line 2® Suite 500	

 Select "Withdraw Report" to display the Withdraw Pay Data Report pop up



Poy Data Deports	Bob Roberts
av Data Report Submission Details	
	Withdraw Report
ep 1: Employer Information Step 2: Establishment & Employee Information Step 3: Certify a	nd Submit 🗙
mployer Information Withdraw P	av Data Report
anually complete the Employer Information record be	
Click the pencil icon in any field to enter value Are you sure you wish to withdraw and close this s Are you sure you wish to withdraw and close this s	submission?
3. To save changes, select "Save".	
4. To reset data to the original values and NOT save	
5. When complete, click the "Step 2: Establishment	B
 to windraw the report, click the windraw kepon 	
Pay Data Report Name	Status
PDRS-20210701-4	New
a2er000000015nbAAC	
Account	Employer DUNS Number
Acme Water Works - Inc	
Employer Name	Employer CA SEIN 12345678
is employer a contractor of the State of	Employer FEIH 0
No	123456789
Employer-Level Clarifying Remarks	Affiliated FEINs 0






	e	Bob Roberts
Home	Pay Data Reports	
	Confirmation of Withdrawal	
	The following Pay Data Report has been Withdrawn: Pay Data Report #: PDRS-20210701-4 Date Withdrawn: 07/01/2021 Click here to go home	
	Communication Center: 800-884-1684 (volce), 800-700-2320 (TTY) or California's Relay Service at 711 paydata.reporting@dfeh.ca.gov	

Select "Click here to go home" to exit



 An in-process Pay Data Report (i.e., a report that is not yet certified) can be viewed and edited using your

• Login into the portal as a returning user (see Option II: Existing User

• To begin the process, select "View

My Pay Data Reports"

login credentials

Login)

6. Accessing In-Process Reports

Nome Pay bala Reports Welcome to the California Pay Data Reporting Portal California law (Government Code §12999) requires employers with 100 or more employees to annually submit data on the pay, hours worked, and demographics of their employees to the Department of Fair Employment and Housing (DFEH). For more information about this law and filing requirements, visit: www.dfeh.ca.gov/paydatareporting. The first filing deadline was I 2021, and annually thereafter on March 31. Employers must use this portal to submit their pay data reports to DFEH. The high-level steps to submit the report are: 1. Register and create a log-in to the portal. 2. Provide employer demographic information. 3. Provide pay data information in one of three ways: a. Upload Excel file. b. Upload. CSV c. Complete on-line forms Prior to certification of a report, an employer may re-enter the portal to change their report using their login credentials. After certification, the employer can access a read-only version of the portal is ported to the ported to the ported to the port and the port is ported to the port is ported to the port is ported to the ported to the ported to the port is ported to the ported to the port is ported to the ported to the ported to the portis ported to the ported to the portis ported to the ported to the	
Welcome to the California Pay Data Reporting Portal California law (Government Code §12999) requires employers with 100 or more employees to annually submit data on the pay, hours worked, and demographics of their employees to the popartment of Fair Employment and Housing (DFEH). For more information about this law and filing requirements, visit: www.dfeh.ca.gov/paydatareporting. The first filing deadline was to 2021, and annually thereafter on March 31. Employers must use this portal to submit their pay data reports to DFEH. The high-level steps to submit the report are: . Register and create a log-in to the portal. . Provide employer demographic information. . Provide pay data information in one of three ways: .a. Upload Excel file. b. Upload .GSV . Complete on-line forms	
California law (Government Code §12999) requires employers with 100 or more employees to annually submit data on the pay, hours worked, and demographics of their employees to th Department of Fair Employment and Housing (DFEH). For more information about this law and filing requirements, visit: www.dfeh.ca.gov/paydatareporting. The first filing deadline was 1 2021, and annually thereafter on March 31. Employers must use this portal to submit their pay data reports to DFEH. The high-level steps to submit the report are: 1. Register and create a log-in to the portal. 2. Provide employer demographic information. 3. Provide pay data information in one of three ways: a. Upload Excel file. b. Upload .CSV c. Complete on-line forms Prior to certification of a report, an employer may re-enter the portal to change their report using their login credentials. After certification, the employer can access a read-only version of	
Employers must use this portal to submit their pay data reports to DFEH. The high-level steps to submit the report are: 1. Register and create a log-in to the portal. 2. Provide employer demographic information. 3. Provide pay data information in one of three ways: a. Upload Excel file. b. Upload .CSV c. Complete on-line forms Prior to certification of a report, an employer may re-enter the portal to change their report using their login credentials. After certification, the employer can access a read-only version of	he California March 31,
Register and create a log-in to the portal. Provide employer demographic information. Provide pay data information in one of three ways: Upload Excel file. Upload .CSV Complete on-line forms Prior to certification of a report, an employer may re-enter the portal to change their report using their login credentials. After certification, the employer can access a read-only version of their report using their login credentials. After certification, the employer can access a read-only version of their report using their login credentials. After certification is a report of a report.	
Prior to certification of a report, an employer may re-enter the portal to change their report using their login credentials. After certification, the employer can access a read-only version of	
pay data reports. If an employer needs to revise information previously certified, the employer must start a new report and explain the correction in the remarks section of the report.	f their certified
Instructions are provided within the portal, in the user guide, and in the FAQs available at: www.dfeh.ca.gov/paydatareporting.	
View My Pay Data Reports Communication Center: 800-884-1684 (voice), 800-700-2320 (TTY) or	



										Bob Roberts	
Home	Pay Data Reports										
Pay	Data Reports										• The portal will display all reports
Verify	your employer information belo	w. If it is your first ti	me logging into the portal, you c	an match with an existing en	nployer based on prior p	ay data reports or cr	eate a new Emp	ployer.			associated with the login
To sub to the	To submit a Pay Data Report, click the "Start a new Pay Data Report" button. You will be prompted to complete the Section I: Employer Information data record. When complete, click the "Next" button. A new report will be added to the Pay Data Reports table below. Click the "Pay Data Report Name" link in the table to continue creating the report.							e added	Select the "Pay Data Report Name"		
To con	tinue editing an existing pay da	ta report, click the	'Pay Data Report Name'' link in t	the table below. Only reports	with a "New" status car	be edited.					for the report to be viewed
Report	ts that are not yet certified can t	be withdrawn at any	v time. While viewing the report,	click the "Withdraw Report" I	button in the top-right to	update the report's	status to "Withdr	rawn".			
My	Employer: Acme W	/ater Works	s - Inc								
FEII	N: 123456789 N: 12345678				Address: 1234 Main Avenue, Si	uite 500					
NAI	CS : 221310			2	Sacramento, CA 9582	50100					• If the Status indicates <i>New</i> , the
E	it Employer Information										certified (see <u>Section 5</u> for details)
	Start a new Pay Data Report										• If the Status indicates Withdrawn o
		-									Certified, the report can be viewed
Pay	Data Reports Shared	Вт									but is not editable
3 items	 Sorted by Pay Data Report Name • 	Filter to y All pay date	a reports • Updated a few seconds ago					Q. Search this list	\$	r - C'	
\frown	Pay Data Report Na 🕇 🗸	Status 🗸	Account	Employer Name	✓ Employer CA ✓	Employer FEIN 🗸	Reporting 🗸	Snapshot Peri 🗸	Snapshot Peri 🗸	,	
(A)	PDRS-20210701-3	Certified	Acme Water Works - Inc	Acme Water Works - Inc	12345678	123456789	2020	10/16/2020	10/31/2020	¥	
2	PDRS-20210701-4	Withdrawn	Acme Water Works - Inc	Acme Water Works - Inc	12345678	123456789	2020	10/16/2020	10/31/2020	¥	
3	PDRS-20210701-5	New	Acme Water Works - Inc	Acme Water Works - Inc	12345678	123456789	2020	10/16/2020	10/31/2020	W	

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Appendix A: Building the California Pay Data Report Excel File

The template is an Excel file and can be used by employers to create their California Pay Data Report for submission to DFEH. The template includes four worksheets: the actual "PayDataReport" that an employer fills in to create its report; "Instructions" for filling out the PayDataReport worksheet; and two example reports (one for a single-establishment employer and one for a multiple-establishment employer). An employer using the template to create its report should perform the following steps.

- 1. Review and follow the instructions in DFEH's <u>FAQs</u> on how to identify the employees and establishments to be reported on, and on how to identify or calculate employees' job category, pay, race, ethnicity, sex, and hours worked, among other topics.
- 2. Download the template at https://pdr.dfeh.ca.gov/Auth/DownloadTemplate?jobType=EPD_2020
- 3. Review and follow the "Instructions" worksheet in the template and the defined steps to build the "PayDataReport". The instructions provide descriptions for each field included in Section II Establishment Information and Employee Detail.
- 4. Review the examples
 - "Example Single Establishment" illustrates a completed PayDataReport by a single-establishment employer.
 - "Example Multi Establishment" illustrates a completed PayDataReport by a multi-establishment employer.
- 5. Enter the required and optional information on the "PayDataReport" worksheet.
- 6. When complete, see <u>Option I: Create a Report by Uploading an Employer-Prepared Excel or .CSV File</u> of this User Guide to begin the upload process using the Portal.



Appendix B: Building the California Pay Data Report .CSV File

Appendix B provides detailed specifications for the creation of a California Pay Data Report in Comma-Separated Value (.CSV) file format.

For reference, download an example report in .CSV format at: <u>https://pdr.dfeh.ca.gov/dfeh/CaliforniaPayDataReport_Template.csv</u>

Employers submitting through the .CSV upload process must create a .CSV file which contains Section II – Establishment Information and Employee Detail records.- These records contain detailed rows for each combination of Establishment, Job Category, Race/Ethnicity/Sex, and Pay Band information. Employers should review the record layout and row level file specification in sections B.3 and B.4 for the detailed requirements and steps required to create this record type.

Note: This .CSV file format was designed to support "Save as .CSV" from the provided template (Excel file). Due to this consideration, there are several static items (titles, column names, asterisks, etc.) that you would not normally see in a .CSV file. These static items must be provided exactly as specified for the file to be processed correctly.

B.1 Section II – Establishment Information and Employee Detail Record Layout

Section II – Establishment Information and Employee Detail requires employers to enter detailed information for each employee detail combination of establishment, job category, race/ethnicity/sex, and pay band. This record type includes a static row to support the header, containing the list of fields. Under this static header, employers may provide as many detailed records as it takes to report each employee detail combination.

Note: Commas are used to separate columns in a .CSV file. For that reason, do not include additional commas in any of your provided values (names, addresses, comments, etc.).

Table 1 defines the record layout for Section II – Establishment Information and Employee Detail.

Colu	Field	Format	Туре	Maximu	Values, Remarks, and Other Instruction	Requir
mn #				m		ed
				Length		
1	Submission	XXXXXXXXXXXXXXXX	Alphanum	18	Enter the Submission Upload ID for the Pay Data Report. Can be found in	Yes
	Upload ID*	XXXX	eric		the Section I data record.	
2	Establishment	XXXXXXXXXX	Alphanum	10	Enter the applicable EEO-1 company ID (single-establishment employers)	No
	ID		eric		or EEO-1 establishment ID (multiple-establishment employers).	

Table 1 - Section II - Establishment Information and Employee Detail Record Layout



Colu mn #	Field	Format	Туре	Maximu m Length	Values, Remarks, and Other Instruction	Requir ed
3	Establishment Name*		Alphanum eric	100	Enter the name of the establishment.	Yes
4	Address Line 1*		Alphanum eric	200	Enter address line 1 of the establishment.	Yes
5	Address Line 2		Alphanum eric	200	Enter address line 2 of the establishment.	No
6	City*		Alphanum eric	50	Enter city of the establishment.	Yes
7	State*	XX	Alphanum eric	2	Enter establishment two character state code. If the employer needs a value that is not a US State or Washington DC, select "OT".	Yes
8	ZIP Code*	XXXXXXXXXX	Alphanum eric	10	Enter the 5-10 character ZIP code of the establishment.	Yes
9	NAICS Code*	999999	Numeric	6	Enter the North American Industry Classification System code (NAICS) of the establishment. See <u>www.naics.com/search</u> .	Yes
10	Major Activity*		Alphanum eric	500	Describe 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. Be specific, e.g., manufacturing steel casings, retail grocer, wholesale plumbing supplies, title insurance, etc.	Yes
11	Total Number of Employees at Establishment*	99999999999	Numeric	10	Enter the total number of employees at the establishment across all job categories, pay bands, races, ethnicities, and sexes during the snapshot period. Include both employees working inside and outside of California.	Yes
12	Was a California Pay Data Report filed for this establishment last year?*	"Yes" or "No"	Alphanum eric	3	Enter "Yes" if the employer submitted a California Pay Data Report in the year prior to the current Reporting Year. Enter "No" if the employer did not submit a California Pay Data Report in the year prior to the current Reporting Year. For the report due to DFEH by March 31, 2021 (covering the 2020 Reporting Year), the entry will be "No" for all employers.	Yes
13	Was an EEO-1 Report filed for this establishment last year?*	"Yes" or "No"	Alphanum eric	3	Enter "Yes" if the employer submitted any type of federal EEO-1 report in the year prior to the current Reporting Year for this establishment. Enter "No" if the employer did not submit any type of federal EEO-1 report in the year prior to the current Reporting Year for this establishment.	Yes



Colu mn #	Field	Format	Туре	Maximu m Length	Values, Remarks, and Other Instruction	Requir ed
14	Is this establishment the employer's headquarters?*	"Yes" or "No"	Alphanum eric	3	Every employer has one and only one headquarters. Enter "Yes" if this establishment is the employer's headquarters. Enter "No" if this establishment is not the employer's headquarters.	Yes
15	Job Category*	99	Alphanum eric	49	Enter one of the following Job Category codes: 1 - Executive senior level officials and managers 2 - First or mid-level officials and managers 3 - Professionals 4 - Technicians 5 - Sales workers 6 - Administrative support workers 7 - Craft workers 8 - Operatives 9 - Laborers and helpers 10 - Service workers All jobs are considered as belonging in one of these ten categories. Follow EEOC guidance for assigning employees to job categories	Yes
16	Race/Ethnicity/ Sex*	XXX	Alphanum eric	86	Etcoc guidance for assigning employees to job categories. Enter one of the following Race-Ethnicity-Sex codes: A10 - Hispanic/Latino - Male A20 - Hispanic/Latino - Female A30 - Hispanic/Latino - Non-Binary B10 - Non-Hispanic/Non-Latino - Male - White B20 - Non-Hispanic/Non-Latino - Male - Black or African American B30 - Non-Hispanic/Non-Latino - Male - Native Hawaiian or Other Pacific Islander B40 - Non-Hispanic/Non-Latino - Male - Asian B50 - Non-Hispanic/Non-Latino - Male - American Indian or Alaskan Native B60 - Non-Hispanic/Non-Latino - Male - Two or more races C10 - Non-Hispanic/Non-Latino - Female - White C20 - Non-Hispanic/Non-Latino - Female - Black or African American	Yes



Colu	Field	Format	Туре	Maximu	Values, Remarks, and Other Instruction	Requir
mn #				m		ed
				Length	C20 Non Hispanis/Non Lating Fomale, Native Hawaiian or Other Pacific	
					Islander	
					CAO - Non-Hispanic/Non-Latino - Female - Asian	
					C50 - Non-Hispanic/Non-Latino - Female - American Indian or Alaskan	
					Native	
					C60 - Non-Hispanic/Non-Latino - Female - Two or more races	
					D10 - Non-Hispanic/Non-Latino - Non-Binary - White	
					D20 - Non-Hispanic/Non-Latino - Non-Binary - Black or African American	
					D30 - Non-Hispanic/Non-Latino - Non-Binary - Native Hawaiian or Other	
					Pacific Islander	
					D40 - Non-Hispanic/Non-Latino - Non-Binary - Asian	
					D50 - Non-Hispanic/Non-Latino - Non-Binary - American Indian or Alaskan	
					Native	
					D60 - Non-Hispanic/Non-Latino - Non-Binary - Two or more races	
					For detailed instructions on how to identify employees' race, ethnicity, and	
					sex, see Part III of DFEH's FAQs:	
					https://www.dfeh.ca.gov/paydatareporting/faqs	
17	Pay Band*	99	Numeric	24	Enter one of the following Pay Bands codes:	Yes
					1 - \$19,239 and under	
					2 - \$19,240 - \$24,439	
					3 - \$24,440 - \$30,679	
					4 - \$30,680 - \$38,999	
					5 - \$39,000 - \$49,919	
					6 - \$49,920 - \$62,919	
					7 - \$62,920 - \$80,079	
					0 ¢101 020 ¢128 0E0 8 - \$80'080 - \$101'818	
					10 - ¢138 060 - ¢163 200 9 - \$101'370 - \$179'323	
					11 - \$163 800 - \$207 999	
					12 - \$208,000 - \$207,555	



Colu mn #	Field	Format	Туре	Maximu m Length	Values, Remarks, and Other Instruction	Requir ed
					To identify the particular pay band in which to count an employee, use the earnings shown in "Box 5 – Medicare wages and tips" of the employee's IRS Form W-2. If any employee has wages not reported in Box 5, as may be the case for an H-2A visa holder for example, use W-2 Box 1 for that employee and note this in the associated remarks field. For additional instructions on how to identify an employee's pay, see Part IV of DFEH's FAQs: https://www.dfeh.ca.gov/paydatareporting/faqs. Additional info can be found at: https://www.eeoc.gov/sites/default/files/migrated_files/employers/eeo1/ iobclassguide.pdf	
18	Number of Employees*	9999999999	Numeric	10	Enter the total number of employees with the specified combination of Job Category, Race/Ethnicity/Sex, and Pay Band in the snapshot period. If zero, you do not need to enter a row.	Yes
19	Total Hours*	99999999999	Numeric	10	Enter the total hours worked in the reporting year of all the employees reported (i.e., all of the employees with the specified combination of Job Category, Race/Ethnicity/Sex, and Pay Band in this row). Round to the nearest whole number. For detailed instructions on how to calculate employees' hours worked, see Part V of DFEH's FAQs: https://www.dfeh.ca.gov/paydatareporting/faqs	Yes
20	Row-Level Clarifying Remarks		Alphanum eric	500	Enter any clarifying remarks for the entire row.	No



B.2 Section II – Establishment Information and Employee Detail File Specification

Table 2 provides a row level example of the data that must be entered to create Section II of the .CSV file. Section II - Establishment Information and Employee Detail records allow the employer to define their employee groups defined by job category, race/ethnicity/sex, and pay band for each establishment.

- 1. Provide the header row containing the list of detailed fields delimited by a comma on row 1. Each field in Table 1 above must be included in the header definition.
- 2. Starting on row 2, provide a row for each combination Job Category, Race/Ethnicity/Sex, and Pay Band for employees who work at the establishment. Employers should populate the detailed rows based on the specification defined in Table 1 above. Each value must be delimited by a comma.
- 3. Repeat step 2 starting on row 3, providing the remaining combinations of job category, race/ethnicity/sex, and pay band for employees for each of the employer's establishments. A single row per combination must be provided, using as many rows as it takes to provide a complete report.



The Submission Upload ID value is unique for each Pay Data Report and is used to associate the records included in the file to the report. This unique value can be found in Step 1: Employer Information in the Submission Upload ID field. This value is represented in Table 2 as "SUBMISSIONUPLOADID".

Table 2 - Establishment Information and Employee Detail – Row Level Example

Row	Field Type	Employer Data Examples
#		
1	Static Item: The example text	Submission Upload ID*, Establishment ID, Establishment Name*, Address Line 1*, Address Line 2, City*, State*, ZIP
	provided must be provided	Code", NAICS Code", Major Activity", Total Number of Employees at Establishment", was a California Pay Data
	exactly as specified on this row.	Report filed for this establishment last year?", Was an EEO-1 Report filed for this establishment last year?", is this
		establishment the employer's headquarters?*, Job Category*, Race/Ethnicity/Sex*, Pay Band*, Number of
		Employees*,Total Hours*,Row-Level Clarifying Remarks
2	Employer detailed	SUBMISSIONUPLOADID,1234567,Acme Water Works - Inc - Station 1000 (AB66242),1234 Main Avenue,Suite
	establishment & employee data	500,Sacramento,CA,95825,221310,Sell and install water supply systems,75,No,Yes,Yes,1 - Executive senior level
	row 1	officials and managers,C20 - Non-Hispanic/Non-Latino - Female - Black or African American,"11 - \$163,800 -
		\$207,999",1,1987,



Row	Field Type	Employer Data Examples
#		
3	Employer detailed	SUBMISSIONUPLOADID,1234567,Acme Water Works - Inc - Station 1000 (AB66242),1234 Main Avenue,Suite
	establishment & employee data	500,Sacramento,CA,95825,221310,Sell and install water supply systems,75,No,Yes,Yes,2 - First or mid-level officials
	row 2	and managers,C50 - Non-Hispanic/Non-Latino - Female - American Indian or Alaskan Native,"10 - \$128,960 -
		\$163,799",5,9050,
4	Employer detailed	SUBMISSIONUPLOADID,1234567,Acme Water Works - Inc - Station 1000 (AB66242),1234 Main Avenue,Suite
	establishment & employee data	500,Sacramento,CA,95825,221310,Sell and install water supply systems,75,No,Yes,Yes,2 - First or mid-level officials
	row 3	and managers,B10 - Non-Hispanic/Non-Latino - Male - White,"10 - \$128,960 - \$163,799",5,9112,
5	Employer detailed	SUBMISSIONUPLOADID,1234567,Acme Water Works - Inc - Station 1000 (AB66242),1234 Main Avenue,Suite
	establishment & employee data	500,Sacramento,CA,95825,221310,Sell and install water supply systems,75,No,Yes,Yes,5 - Sales workers,B60 - Non-
	row 4	Hispanic/Non-Latino - Male - Two or more races,"8 - \$80,080 - \$101,919",39,65286,
6	Employer detailed	SUBMISSIONUPLOADID,1234567,Acme Water Works - Inc - Station 1000 (AB66242),1234 Main Avenue,Suite
	establishment & employee data	500,Sacramento,CA,95825,221310,Sell and install water supply systems,75,No,Yes,Yes,5 - Sales workers,C60 - Non-
	row 5	Hispanic/Non-Latino - Female - Two or more races,"8 - \$80,080 - \$101,919",25,43950,
7	Employer detailed	SUBMISSIONUPLOADID,7654321,Acme Water Works - Inc - Station 2000 (AB66243),505 Crocker
	establishment & employee data	Avenue,,Rocklin,CA,95663,221311,Sell and install water supply systems,25,No,No,No,4 - Technicians,C40 - Non-
	row 6	Hispanic/Non-Latino - Female - Asian,"9 - \$101,920 - \$128,959",7,65286,
8	Employer detailed	SUBMISSIONUPLOADID,7654321,Acme Water Works - Inc - Station 2000 (AB66243),505 Crocker
	establishment & employee data	Avenue,,Rocklin,CA,95663,221311,Sell and install water supply systems,25,No,No,No,5 - Sales workers,Non-
	row 7	Hispanic/Non-Latino - Non-Binary - White,"8 - \$80,080 - \$101,919",5,65286,
9	Employer detailed	SUBMISSIONUPLOADID,7654321,Acme Water Works - Inc - Station 2000 (AB66243),505 Crocker
	establishment & employee data	Avenue,,Rocklin,CA,95663,221311,Sell and install water supply systems,25,No,No,No,5 - Sales workers,D20 - Non-
	row 8	Hispanic/Non-Latino - Non-Binary - Black or African American,"8 - \$80,080 - \$101,919",13,65286,
10	Employer detailed	SUBMISSIONUPLOADID,1231231,Acme Water Works - Inc - Station 3000 (AB66244),444 North 54th
	establishment & employee data	Street,,Reno,NV,89501,221312,Sell and install water supply systems,50,No,Yes,No,4 - Technicians,C60 - Non-
	row 9	Hispanic/Non-Latino - Female - Two or more races,"8 - \$80,080 - \$101,919",2,3200,
11	Employer detailed	SUBMISSIONUPLOADID,1231231,Acme Water Works - Inc - Station 3000 (AB66244),444 North 54th
	establishment & employee data	Street,,Reno,NV,89501,221312,Sell and install water supply systems,50,No,Yes,No,5 - Sales workers,D10 - Non-
	row 10	Hispanic/Non-Latino - Non-Binary - White,"6 - \$49,920 - \$62,919",1,1600,
12	Employer detailed	SUBMISSIONUPLOADID,1231231,Acme Water Works - Inc - Station 3000 (AB66244),444 North 54th
	establishment & employee data	Street,,Reno,NV,89501,221312,Sell and install water supply systems,50,No,Yes,No,5 - Sales workers,B40 - Non-
	row 11	Hispanic/Non-Latino - Male - Asian,"7 - \$62,920 - \$80,079",1,1750,
13	Employer detailed	Continue entering combination of job category, race/ethnicity/sex, and pay band for each establishment.
	establishment & employee data	
	row N	



Appendix C: Release Notes

Release 1.1

The following changes have been made in Release 1.1:

Artifact	Section / Page	Change
Excel Template	Instructions Worksheet	Minor clarifications, including replacing references to the EEO-1 Instruction Booklet with equivalent
		guidance.
Excel Template	Section I – Employer Information	Added the ability to input alphanumeric characters in the EDD ZIP Code field.
Excel Template	Section I – Employer Information	Added the ability to input alphanumeric characters in the HQ ZIP Code field.
Excel Template	Section I – Employer Information	Added the ability to input alphanumeric characters in the Parent Company ZIP Code field.
Excel Template	Section I – Employer Information	Added the ability to input alphanumeric characters in the Contact ZIP Code field.
Excel Template	Section II.A – Establishment Information	Added the ability to input alphanumeric characters in the Establishment ZIP Code field.
User Guide	N/A	Minor clarifications and cleanup.
Portal	Section I – Employer Information Data Record Page	Added the ability to input alphanumeric characters in the EDD ZIP Code field.
Portal	Section I – Employer Information Data Record Page	Added the ability to input alphanumeric characters in the HQ ZIP Code field.
Portal	Section I – Employer Information Data Record Page	Added the ability to input alphanumeric characters in the Parent Company ZIP Code field.
Portal	Section I – Employer Information Data Record Page	Added the ability to input alphanumeric characters in the Contact ZIP Code field.
Portal	Section II – Establishment Information and	Added the ability to input alphanumeric characters in the Establishment ZIP Code field.
	Employment Detail Data Record Page	
Portal	Certification and Submission Page	Added the ability to input alphanumeric characters in the ZIP Code field.
Excel Template	Section II.A – Establishment Information	Changed the maximum characters in the Establishment ID field from 7 to 10.
Excel Template	Section II.B – Employment Information	Clarified instructions for the Hours Worked field. The value should rounded to the nearest whole
		number.
User Guide	Appendix B – B.3 Section II – Establishment	Changed the maximum characters in the Establishment ID field from 7 to 10.
	Information and Employee Detail Record Layout	
User Guide	Appendix B – B.3 Section II – Establishment	Clarified instructions for the Hours Worked field. The value should rounded to the nearest whole
	Information and Employee Detail Record Layout	number.
Portal	Section II – Establishment Information and	Clarified the validation message for the Hours Worked field to indicate the value must be a whole
	Employment Detail Data Record Page	number.
Excel Template	Section I – Employer Information	Added instructions on the use of the "OT" selection value to the EDD State, HQ State, Parent
		Company State, and Contact State fields.
Excel Template	Section II.A – Establishment Information	Added instructions on the use of the "OT" selection value to the State field.
User Guide	Appendix B – B.2 Section I – Employer Information	Added instructions on the use of the "OT" selection value to the EDD State, HQ State, Parent
	Row Level File Specification	Company State, and Contact State fields.
User Guide	Appendix B – B.2 Section I – Employer Information	Added instructions on where to find a complete list of Country codes to the EDD Country, HQ
	Row Level File Specification	Country, Parent Company Country, and Contact Country fields.



Artifact	Section / Page	Change
User Guide	Appendix B – B.3 Section II – Establishment	Added instructions on the use of the "OT" selection value to the State field.
	Information and Employee Detail Record Layout	
Portal	Section I – Employer Information Data Record Page	Added "DC" and "OT" as selection values to the EDD State, HQ State, Parent Company State, and
		Contact State fields.
Portal	Section II – Establishment Information and	Added "DC" and "OT" as selection values to the State field.
	Employment Detail Data Record Page	
User Guide	B.2 Section I – Employer Information Row Level File	Added instructions to clarify .CSV file line break parameters.
	Specification	
Portal	Certification Page – Certified File Download	Updated the downloadable file of certified data to open on the 'PayDataReport' worksheet instead
		of the 'Instructions' worksheet.

Release 2.0

The following changes have been made in Release 2.0:

Artifact	Section / Page	Change
Portal	N/A	The Pay Data Reporting Portal has been migrated to the Salesforce platform. Numerous user
		interface changes.
User Guide	N/A	The Pay Data Reporting Portal has been migrated to the Salesforce platform. Numerous user
		interface changes.
Excel Template	N/A	The Pay Data Reporting Portal has been migrated to the Salesforce platform. Removed the need for
		Section I: Employer Information to be included in the import file. Also added validations to better
		enforce data quality.
.CSV Template	N/A	The Pay Data Reporting Portal has been migrated to the Salesforce platform. Removed the need for
		Section I: Employer Information to be included in the import file.