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1. Introduction

California law (Government Code §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, overviews the content of a Pay Data Report, and notes key similarities to and differences from the federal EEO-1 survey.

- Basic Structure of the CA Pay Data Report
  - Describes the basic structure of the Pay Data Report for both single- and multi-establishment employers.

- Portal Overview
  - Provides a general description of each page in the Pay Data Reporting Portal along with the actions available on the page.

- Logging Into the Portal
  - Describes how to create a new user account and how to match it with or create a new employer.

- Submitting the Pay Data Report
  - Describes how to create a new Pay Data Report by either uploading an Excel file, uploading a .CSV file, or manually entering data via the portal.

- Accessing In-Process Reports
  - Describes how to return to a previously uploaded or manually created report to complete the certification process.
1.2 Top 5 Changes from the 2020 Report

1. New Due Date
   - The due date for 2021 Pay Data Report is **April 1st, 2022**.
   - There is not a deferral period this year.

2. Updated Pay Bands
   - The Bureau of Labor Statistics has updated the wage intervals (aka pay bands) from those used in last year’s collection:

<table>
<thead>
<tr>
<th>Pay Band</th>
<th>2020 Report</th>
<th>2021 Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>$19,239 and under</td>
<td>$19,239 and under</td>
</tr>
<tr>
<td>2</td>
<td>$19,240 – $24,439</td>
<td>$19,240 – $24,959</td>
</tr>
<tr>
<td>3</td>
<td>$24,440 – $30,679</td>
<td>$24,960 – $32,239</td>
</tr>
<tr>
<td>4</td>
<td>$30,680 – $38,999</td>
<td>$32,240 – $41,079</td>
</tr>
<tr>
<td>5</td>
<td>$39,000 – $49,919</td>
<td>$41,080 – $53,039</td>
</tr>
<tr>
<td>6</td>
<td>$49,920 – $62,919</td>
<td>$53,040 – $68,119</td>
</tr>
<tr>
<td>7</td>
<td>$62,920 – $80,079</td>
<td>$68,120 – $87,359</td>
</tr>
<tr>
<td>8</td>
<td>$80,080 – $101,919</td>
<td>$87,360 – $112,319</td>
</tr>
<tr>
<td>9</td>
<td>$101,920 – $128,959</td>
<td>$112,320 – $144,559</td>
</tr>
<tr>
<td>10</td>
<td>$128,960 – $163,799</td>
<td>$144,560 – $186,159</td>
</tr>
<tr>
<td>11</td>
<td>$163,800 – $207,999</td>
<td>$186,160 – $239,199</td>
</tr>
<tr>
<td>12</td>
<td>$208,000 and over</td>
<td>$239,200 and over</td>
</tr>
</tbody>
</table>
3. New Registration Process

The registration process has been updated and now allows the individual who completed the Pay Data Report to view their certified Pay Data Reports.

The registration process includes two major components: 1) registering the individual completing the Pay Data Report (steps 1-3 above), and; 2) registering the employer (steps 4-5 above). If you filed your 2020 report after July 1st, 2021, you do not need to re-register.

Detailed screenshots and instructions can be found in Section 4 – Logging Into the Portal.

4. New Interface to Upload Data

Last year, the uploaded data included both Section I: Employer Information and Section II: Establishment Information & Employee Detail data.

Now, Section I: Employer Information is provided through a series of on-screen questions. The Section II: Establishment Information & Employee Detail is still provided by a data upload file (it may also be completed manually within the Portal).

Refer to Section 5 – Submitting the Pay Data Report for detailed instructions.

5. New Reference Materials

All reference materials, including this user guide, have been updated for the 2021 Pay Data Report at www.dfeh.ca.gov/paydatareporting/.
1.3 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, 2021, and Dec. 31, 2021 (“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 and working outside of CA may be included in the report
  - For additional guidance, review Parts III and VI of DFEH’s FAQs
- For each employee in the snapshot period, identify or calculate each employee’s:
  - Establishment
  - Job category
  - Race, ethnicity, and sex
  - Earnings in 2021 (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 2021 (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 DFEH’s FAQs
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 2021 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 [available here](#). 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.
1.4 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:

- **Key Similarities:** For the California Pay Data Report, employers should:
  - Use the same establishments that they use in the EEO-1 survey
  - Follow the EEOC guidance on job categorization, race, and ethnicity

- **Key Differences:** 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
  - 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 2021 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 2021
  - 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 1.3 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 FAQ “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 April 1, 2022, 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 FAQ “What does “establishment” mean? What does it mean for an employee to be “assigned to” an establishment?”, among others.
• 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 2021.
• There are 2,520 possible combinations of job category, pay band, and race/ethnicity/sex:
  o 10 job categories x 12 pay bands x 21 race/ethnicity/sex combinations = 2,520
  o A bird’s eye illustration of all of 2,520 possible combinations is available here. 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.
For example, assume that a single-establishment employer has 100 employees. Of these, ten are Sales workers, Latina, and Female; each made between $41,080 - $53,039 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 2021
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

<table>
<thead>
<tr>
<th>Name*</th>
<th>Address Line 1*</th>
<th>Establishment Total Employees*</th>
<th>Job Category*</th>
<th>Race/Ethnicity /Sex*</th>
<th>Pay Band*</th>
<th>Number of Employees*</th>
<th>Hours Worked*</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC Corp.</td>
<td>Atlantic Ave</td>
<td>120</td>
<td>5</td>
<td>B60</td>
<td>6</td>
<td>70</td>
<td>140000</td>
</tr>
<tr>
<td>ABC Corp.</td>
<td>Atlantic Ave</td>
<td>120</td>
<td>4</td>
<td>A20</td>
<td>8</td>
<td>50</td>
<td>100000</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Name*</th>
<th>Address Line 1*</th>
<th>Establishment Total Employees*</th>
<th>Job Category*</th>
<th>Race/Ethnicity /Sex*</th>
<th>Pay Band*</th>
<th>Number of Employees*</th>
<th>Hours Worked*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establishment A</td>
<td>Atlantic Ave</td>
<td>70</td>
<td>5</td>
<td>B60</td>
<td>6</td>
<td>30</td>
<td>60000</td>
</tr>
<tr>
<td>Establishment A</td>
<td>Atlantic Ave</td>
<td>70</td>
<td>4</td>
<td>A20</td>
<td>8</td>
<td>40</td>
<td>80000</td>
</tr>
<tr>
<td>Establishment B</td>
<td>Pacific Ave</td>
<td>30</td>
<td>7</td>
<td>C40</td>
<td>7</td>
<td>15</td>
<td>30000</td>
</tr>
<tr>
<td>Establishment B</td>
<td>Pacific Ave</td>
<td>30</td>
<td>3</td>
<td>A10</td>
<td>8</td>
<td>10</td>
<td>20000</td>
</tr>
<tr>
<td>Establishment B</td>
<td>Pacific Ave</td>
<td>30</td>
<td>8</td>
<td>C10</td>
<td>7</td>
<td>5</td>
<td>10000</td>
</tr>
</tbody>
</table>
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.

---

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 filing deadline for the 2021 reporting year is April 1, 2022.

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 information.
3. Provide establishment and employee information:
   a. Upload Excel file
   b. Upload CSV file
   c. Complete online 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 certified pay data reports. If an employer needs to revise information previously certified, the previously certified report may be decertified and edited no later than the due date of the reporting year or seven days after certification, whichever comes last. If a certified report must be revised after this cutoff period, the employer must start a new report, entering all data, 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.

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

Actions Available

1. 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 4 – Logging into the Portal

Actions Available
1. Log into the Portal
2. Register a new user
3. Change or recover your user password
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

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 reports.
3. 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.

Actions Available:

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.
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.

**Actions Available**

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.
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

Actions Available

1. 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

Establishment Name: Acme Water Works Inc Station 1

Establishment Address

Street: 123 Main Street
City: Sacramento
State: CA
Zip: 95831

NAICS: 123456
Major Activity: Water Filtration

Is this establishment the headquarters for the employer? Yes/No
Was pay data submitted to DFEH for this establishment in a prior year? Yes/No
Was there any type of Federal EEO-1 report field for this establishment in a prior year? Yes/No
3.7 Employee Detail Data Record Page

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

Actions Available

1. 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
4. Navigate back to the Establishment Information data record by clicking the Establishment Name link
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.

Actions Available

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

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

- Select “Create an account”
• Enter the new user’s **First Name**, **Last Name**, **Title**, and **Email** to begin the registration process

• Select “Register” to register

• The Portal will send a verification link to the provided email address

• Open the email from California Pay Data Reporting System

• Securely record the Username as it will be required when re-entering the Portal to view or edit pay data

• Follow the provided instructions and select the secure link
4.1.2 Step 2: Link to an Employer

- Click on Manage Employers
- Select **Link Existing Employer** to link to an existing employer

- Select **Create New Employer** to create a new employer

- Select **Edit** to edit a linked employer
4.1.2 Step 2a: Link Existing Employer

- Select **Search by Pay Data Report Number (Formerly Submission ID)** to search for your employer using the 2020 Pay Data Report Number (listed in the educational letter).
- Complete required fields.
- Select **Search by Submission Info** to search for your employer using the Employer FEIN, Employer CA SEIN, and 2020 report information submission information.
- Complete required fields.
- Select **Search for record** to search locate your employer.
- Select **Cancel** to exit the search screen.
4.1.2 Step 2: Login to the Portal

- 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
4.2 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
- Select “Log into the Portal”
- In the event of a lost password, select “Forgot your password?”
- See Step 4 for details.
4.2.2 Step 2: View the Welcome Page

- Select “My Pay Data Reports” to view your pay data reports
- Select “Log Out” under the Username to close your session and log out of the Portal
- This is always available throughout the Portal
4.2.3 Step 3: View Pay Data Reports

The portal will display all pay data reports associated to the user.
4.2.4 Step 4: Forgotten Password

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

- 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”
• 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
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 Submission

- Click “Start a Submission” to begin your report.
5.1.2 Step 2: Select Reporting Year

- Select the reporting year for your report.
- You may click the Cancel Button to cancel and exit.
5.1.3 Step 3: Select Snapshot Period

- Select the beginning of snapshot period date using the calendar date picker
- Select the end of snapshot period date using the calendar date picker
- Note: The snapshot is a single pay period between October 1 and December 31
- Click the Back Button to display the Reporting Year
- Click the Cancel Button to cancel and exit
- Click the Next Button to display the employer page
5.1.4 Step 4: Employer Selection

- Click “Select an Employer you created previously” if you are submitting a report for a previously created employer account
- Click “Create and select a new Employer” if you are submitting a report for a new employer account
- Click the Back Button to display the Snapshot Period
- Click the Cancel Button to cancel and exit

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.
5.1.5 Step 4a: Select an Existing Employer

- Select the Employer from the dropdown menu
- Click the Back Button to display the previous page
- Click the Cancel Button to cancel and exit
- Click the Next Button to display the Contractor page
5.1.6 Step 4b: Create a New Employer

- Complete the Employer Information Form
- Fields in red with an "*" are required
- Click the Back Button to display the previous page
- Click the Cancel Button to cancel and exit
- Click the Next Button to display the Contractor page
5.1.7 Step 5: Contractor Information

- The portal will display all pay data reports associated to the employer
- Click the Back Button to display the previous page
- Click the Cancel Button to cancel and exit
- Click the Start Report Button to generate the report
5.2 Enter Section I: Employer Information Data

- **Navigation Panel:** Each sub-header corresponds to a step required to complete the pay data report submission.
- **Clicking on a sub-header will display that step’s section.**
- **Enter all required information in the pop up.**
- **Note:** Many of the fields will be auto-filled from the Employer Account Information. However, if there are any discrepancies, please correct them here before moving forward.
- **Required fields are denoted with a red asterisk ( * ) at the beginning of the field name.**
- **Click the Next Button to display Submission Information.**
• Enter all required information on the page
• Required fields are denoted with a red asterisk (*) at the beginning of the field name

• Click the Previous Button to display the Employer Info Section
• Click the Next Button to display the Establishment and Employee Details Section
5.3 Enter Section II: Establishment Information & Employee Detail Data

5.3.1 Option I: Create a Report by Uploading an Employer-Prepared Excel or .CSV 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: Appendix A: Building the CA Pay Data Report Excel File or Appendix B: Building the CA Pay Data Report .CSV File.

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.
Click the Import Data Button to upload an excel or csv. file

Click the Previous Button to display the Submission Info Section

Click the Next Button to display the Certify and Submit Page

For details on how to use this site, please see the Guide.
5.3.1.1 Step 1: Prepare Excel or .CSV File

- Select “Download Template” and save the Pay Data Report Template (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 Appendix B.

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: Upload the Excel or .CSV File

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 instructions 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. Upload a .CSV file
   a. Prepare a .CSV file with the required data (See detailed .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, return to the submission form to continue.

- Select “Upload Data File” to begin the upload process.
- The portal will display the managed import pop up.
• 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
• 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

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 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 5 for details).

Select “Done” when finished.
5.3.1.3 Step 3: Review Pay Data Report

- The portal displays the imported Establishment Information and Employee Details in a grid.
- Review the records to ensure they imported as expected.

- Click the Edit Button to select an Establishment to view the record’s detailed information, including all associated Employee Detail records for the establishment.
- Review the records to ensure they imported as expected.
- Click the Delete Button to delete the Establishment and its associated Employee Detail records.

- Click the Previous Button to display Submission Info.
- Click the Next Button to display the Certify and Submit.
5.3.1.4 Step 4: Correct Data Errors

<table>
<thead>
<tr>
<th>Column</th>
<th>Data Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish name</td>
<td>Name of the establishment</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>Address Line 1 of the establishment</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>Address Line 2 of the establishment</td>
</tr>
<tr>
<td>City</td>
<td>City of the establishment</td>
</tr>
<tr>
<td>State</td>
<td>State of the establishment</td>
</tr>
<tr>
<td>ZIP Code</td>
<td>ZIP Code of the establishment</td>
</tr>
<tr>
<td>NAICS Code</td>
<td>NAICS Code of the establishment</td>
</tr>
<tr>
<td>Major Activity</td>
<td>Major activity of the employee</td>
</tr>
<tr>
<td>Job Type</td>
<td>Job Type of the employee</td>
</tr>
<tr>
<td>Pay Band</td>
<td>Pay Band of the employee</td>
</tr>
<tr>
<td>Number of Employees</td>
<td>Number of employees on the payroll report</td>
</tr>
<tr>
<td>Total Hours</td>
<td>Total hours worked by the employee</td>
</tr>
<tr>
<td>Establishment ID</td>
<td>ID of the establishment</td>
</tr>
<tr>
<td>Submission ID</td>
<td>Submission ID of the report</td>
</tr>
<tr>
<td>Remarks</td>
<td>Remarks about the establishment</td>
</tr>
</tbody>
</table>

- If “Download error file” was selected in the managed upload pop up (see Step 3), open the downloaded .CSV file to view all errors encountered by the portal during the upload process.
- 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, Step 2) or by correcting the import file and reuploading it (see Step 3).
5.3.2 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.
Pay data reports cannot be certified until a complete Establishment Information record and a complete Employee Detail record have been added to the report.
5.3.2.1 Step 1: Enter Establishment Information

- 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, click the Create Button to save the data for the New Establishment and to display the Employee Details associated with the New Establishment
- 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
- Click the Close Button to Exit this screen
5.3.2.2 Step 2: Enter Employee Details

- Click the New Employee Detail Button to Display the Create Employee Detail Record Screen
- Click the Close Button to close this screen and return to the Establishment and Employee Detail Page

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 “Close” to exit the screen without saving

Select “Create and Close” to save and close the screen
• Additional Employee Details may be created by clicking the New Employee Detail Button

• Click the Edit Button to edit the Employee Detail entry

• Click the Delete Button to delete the Employee Detail entry

• Click the Close Button to Close this screen and return to the Establishment and Employee Details Page
• Click the Next Button to display the Certify and Submit Page
• See 5.4 – Certifying the Report for details
5.4 Certifying the Report

- Enter all required information in the Point of Contact and Report Certifier Sub-Sections
- Required fields are denoted with a red asterisk (*) at the beginning of the field name
- Click the Submit as Certified to Submit and Certify your report
- Click the Previous Button to display the Establishment and Employee Details Page

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 5.3 Enter Establishment Information & Employee Details.
The pay data report has been certified.
Select “Click here to view existing Pay Data Report Submissions” to exit and display the My Pay Data Reports Page.

For details on how to use this site, please see the User's Guide.
5.5 Decertifying the Report

- Select “My Pay Data Reports”
Select the “Decertify Report” Button on the Pay Data Report you want to decertify.
- Select the Decertify Button to confirm your intention to decertify the report.
- If you do no longer want to decertify the report, click “Cancel” to cancel and exit the Decertify Record Pop-Up.
This is the Confirmation for decertification of your report
Select “OK” to exit
6. Accessing In-Process Reports

- An in-process Pay Data Report (i.e., a report that is not yet certified) can be viewed and edited using your login credentials
- Login into the portal as a returning user (see Option II: Existing User Login)
- To begin the process, select “Resume a Submission”
• The portal will display all reports that have the status New associated with the login
• Select the “Edit Report” for the report to be viewed

• If the Status indicates New, the report can be edited, withdrawn, or certified (see Section 5 for details)
• If the Status indicates Withdrawn or Certified, the report can be viewed but is not editable
## 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 [FAQs](https://www.dfeh.ca.gov/wp-content/uploads/sites/32/2021/07/CaliforniaPayDataReport_Template.xlsx) 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.


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.

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.


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.

<table>
<thead>
<tr>
<th>Column #</th>
<th>Field</th>
<th>Format</th>
<th>Type</th>
<th>Maximum Length</th>
<th>Values, Remarks, and Other Instruction</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Establishment ID</td>
<td>XXXXXXXX XX</td>
<td>Alphanumeric</td>
<td>10</td>
<td>Enter the applicable EEO-1 company ID (single-establishment employers) or EEO-1 establishment ID (multiple-establishment employers).</td>
<td>No</td>
</tr>
<tr>
<td>Column #</td>
<td>Field</td>
<td>Format</td>
<td>Type</td>
<td>Maximum Length</td>
<td>Values, Remarks, and Other Instruction</td>
<td>Required</td>
</tr>
<tr>
<td>----------</td>
<td>----------------------------------------------------------------------</td>
<td>------------</td>
<td>------------</td>
<td>----------------</td>
<td>-------------------------------------------------------------------------------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>2</td>
<td>Establishment Name*</td>
<td>Alphanumeric</td>
<td>100</td>
<td>Enter the name of the establishment.</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Address Line 1*</td>
<td>Alphanumeric</td>
<td>200</td>
<td>Enter address line 1 of the establishment.</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Address Line 2</td>
<td>Alphanumeric</td>
<td>200</td>
<td>Enter address line 2 of the establishment.</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>City*</td>
<td>Alphanumeric</td>
<td>50</td>
<td>Enter city of the establishment.</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>State*</td>
<td>XX</td>
<td>Alphanumeric</td>
<td>Enter establishment two character state code. If the employer needs a value that is not a US State or Washington DC, select &quot;OT&quot;.</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>ZIP Code*</td>
<td>XXXXXXXXX XX</td>
<td>Alphanumeric</td>
<td>Enter the 5-10 character ZIP code of the establishment.</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>NAICS Code*</td>
<td>999999</td>
<td>Numeric</td>
<td>Enter the North American Industry Classification System code (NAICS) of the establishment. See <a href="http://www.naics.com/search">www.naics.com/search</a>.</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Major Activity*</td>
<td>Alphanumeric</td>
<td>500</td>
<td>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.</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Total Number of Employees at Establishment*</td>
<td>999999999 99</td>
<td>Numeric</td>
<td>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.</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Was a California Pay Data Report filed for this establishment last year?*</td>
<td>“Yes” or “No”</td>
<td>Alphanumeric</td>
<td>Enter &quot;Yes&quot; if the employer submitted a California Pay Data Report in the year prior to the current Reporting Year. Enter &quot;No&quot; 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 &quot;No&quot; for all employers.</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Was an EEO-1 Report filed for this establishment last year?*</td>
<td>“Yes” or “No”</td>
<td>Alphanumeric</td>
<td>Enter &quot;Yes&quot; if the employer submitted any type of federal EEO-1 report in the year prior to the current Reporting Year for this establishment. Enter &quot;No&quot; 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.</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Column #</td>
<td>Field</td>
<td>Format</td>
<td>Type</td>
<td>Maximum Length</td>
<td>Values, Remarks, and Other Instruction</td>
<td></td>
</tr>
<tr>
<td>----------</td>
<td>-------</td>
<td>--------</td>
<td>------</td>
<td>----------------</td>
<td>----------------------------------------</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Is this establishment the employer's headquarters?*</td>
<td>“Yes” or “No”</td>
<td>Alphanumeric</td>
<td>3</td>
<td>Every employer has one and only one headquarters. Enter &quot;Yes&quot; if this establishment is the employer's headquarters. Enter &quot;No&quot; if this establishment is not the employer's headquarters.</td>
<td></td>
</tr>
</tbody>
</table>
| 14       | Job Category* | 99 | Alphanumeric | 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. |
| 15       | Race/Ethnicity/Sex* | XXX | Alphanumeric | 86 | 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  
C30 - Non-Hispanic/Non-Latino - Female - Native Hawaiian or Other Pacific Islander |
<table>
<thead>
<tr>
<th>Column #</th>
<th>Field</th>
<th>Format</th>
<th>Type</th>
<th>Maximum Length</th>
<th>Values, Remarks, and Other Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>C40</td>
<td>Non-Hispanic/Non-Latino - Female - Asian</td>
<td></td>
<td></td>
<td></td>
<td>C40 - Non-Hispanic/Non-Latino - Female - Asian</td>
</tr>
<tr>
<td>C50</td>
<td>Non-Hispanic/Non-Latino - Female - American Indian or Alaskan Native</td>
<td></td>
<td></td>
<td></td>
<td>C50 - Non-Hispanic/Non-Latino - Female - American Indian or Alaskan Native</td>
</tr>
<tr>
<td>C60</td>
<td>Non-Hispanic/Non-Latino - Female - Two or more races</td>
<td></td>
<td></td>
<td></td>
<td>C60 - Non-Hispanic/Non-Latino - Female - Two or more races</td>
</tr>
<tr>
<td>D10</td>
<td>Non-Hispanic/Non-Latino - Non-Binary - White</td>
<td></td>
<td></td>
<td></td>
<td>D10 - Non-Hispanic/Non-Latino - Non-Binary - White</td>
</tr>
<tr>
<td>D20</td>
<td>Non-Hispanic/Non-Latino - Non-Binary - Black or African American</td>
<td></td>
<td></td>
<td></td>
<td>D20 - Non-Hispanic/Non-Latino - Non-Binary - Black or African American</td>
</tr>
<tr>
<td>D30</td>
<td>Non-Hispanic/Non-Latino - Non-Binary - Native Hawaiian or Other Pacific Islander</td>
<td></td>
<td></td>
<td></td>
<td>D30 - Non-Hispanic/Non-Latino - Non-Binary - Native Hawaiian or Other Pacific Islander</td>
</tr>
<tr>
<td>D50</td>
<td>Non-Hispanic/Non-Latino - Non-Binary - American Indian or Alaskan Native</td>
<td></td>
<td></td>
<td></td>
<td>D50 - Non-Hispanic/Non-Latino - Non-Binary - American Indian or Alaskan Native</td>
</tr>
<tr>
<td>D60</td>
<td>Non-Hispanic/Non-Latino - Non-Binary - Two or more races</td>
<td></td>
<td></td>
<td></td>
<td>D60 - Non-Hispanic/Non-Latino - Non-Binary - Two or more races</td>
</tr>
</tbody>
</table>

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

16 | Pay Band* | 99 | Numeric | 24 | Enter one of the following Pay Bands codes: |
|    |           |    |         |    | 1 - $19,239 and under                   |
|    |           |    |         |    | 2 - $19,240 - $24,959                  |
|    |           |    |         |    | 3 - $24,960 - $32,239                  |
|    |           |    |         |    | 4 - $32,240 - $41,079                  |
|    |           |    |         |    | 5 - $41,080 - $53,039                  |
|    |           |    |         |    | 6 - $53,040 - $68,119                  |
|    |           |    |         |    | 7 - $68,120 - $87,359                  |
|    |           |    |         |    | 8 - $87,360 - $112,319                 |
|    |           |    |         |    | 9 - $112,320 - $144,559                |
|    |           |    |         |    | 10 - $144,560 - $186,159               |
|    |           |    |         |    | 11 - $186,160 - $239,199               |
|    |           |    |         |    | 12 - $239,200 and over                 |

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
California Pay Data Reporting Portal – User Guide

<table>
<thead>
<tr>
<th>Column #</th>
<th>Field</th>
<th>Format</th>
<th>Type</th>
<th>Maximum Length</th>
<th>Values, Remarks, and Other Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>employee's pay, see Part IV of DFEH's FAQs: <a href="https://www.dfeh.ca.gov/paydatareporting/faqs">https://www.dfeh.ca.gov/paydatareporting/faqs</a>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Additional info can be found at:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Previous Years' Pay Bands:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
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<td></td>
<td></td>
<td>Pay Band</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2020 Reporting Year</td>
</tr>
<tr>
<td>1</td>
<td>Number of Employees*</td>
<td>999999999</td>
<td>Numeric</td>
<td>10</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>99</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Total Hours*</td>
<td>999999999</td>
<td>Numeric</td>
<td>10</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>99</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For detailed instructions on how to calculate employees' hours worked, see Part V of DFEH's FAQs: https://www.dfeh.ca.gov/paydatareporting/faqs
<table>
<thead>
<tr>
<th>Column #</th>
<th>Field</th>
<th>Format</th>
<th>Type</th>
<th>Maximum Length</th>
<th>Values, Remarks, and Other Instruction</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>19</td>
<td>Row-Level Clarifying Remarks</td>
<td>Alphanumeric</td>
<td>500</td>
<td></td>
<td>Enter any clarifying remarks for the entire row.</td>
<td>No</td>
</tr>
</tbody>
</table>
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 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.

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

<table>
<thead>
<tr>
<th>Row #</th>
<th>Field Type</th>
<th>Employer Data Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Static Item: The example text provided must be provided exactly as specified on this row.</td>
<td>Establishment ID, Establishment Name*, Address Line 1*, Address Line 2*, City*, State*, ZIP Code*, NAICS Code*, Major Activity*, Total Number of Employees at Establishment*, Was a California Pay Data Report filed for this establishment last year?<em>, Was an EEO-1 Report filed for this establishment last year?</em>, Is this establishment the employer's headquarters?<em>, Job Category</em>, Race/Ethnicity/Sex*, Pay Band*, Number of Employees*, Total Hours*, Row-Level Clarifying Remarks</td>
</tr>
<tr>
<td>2</td>
<td>Employer detailed establishment &amp; employee data row 1</td>
<td>1234567, Acme Water Works - Inc - Station 1000 (AB66242), 1234 Main Avenue, Suite 500, Sacramento, CA, 95825, 221310, Sell and install water supply systems, 75, No, Yes, Yes, 1, C20, 11, 1, 1987,</td>
</tr>
<tr>
<td>3</td>
<td>Employer detailed establishment &amp; employee data row 2</td>
<td>1234567, Acme Water Works - Inc - Station 1000 (AB66242), 1234 Main Avenue, Suite 500, Sacramento, CA, 95825, 221310, Sell and install water supply systems, 75, No, Yes, Yes, 2, C50, 10, 5, 9050,</td>
</tr>
<tr>
<td>4</td>
<td>Employer detailed establishment &amp; employee data row 3</td>
<td>1234567, Acme Water Works - Inc - Station 1000 (AB66242), 1234 Main Avenue, Suite 500, Sacramento, CA, 95825, 221310, Sell and install water supply systems, 75, No, Yes, Yes, 2, B10, 10, 5, 9112,</td>
</tr>
<tr>
<td>Row #</td>
<td>Field Type</td>
<td>Employer Data Examples</td>
</tr>
<tr>
<td>-------</td>
<td>------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>5</td>
<td>Employer detailed establishment &amp; employee data row 4</td>
<td>1234567, Acme Water Works - Inc - Station 1000 (AB66242), 1234 Main Avenue, Suite 500, Sacramento, CA, 95825, 221310, Sell and install water supply systems, 75, No, Yes, Yes, 5, B60, 8, 39, 65286,</td>
</tr>
<tr>
<td>6</td>
<td>Employer detailed establishment &amp; employee data row 5</td>
<td>1234567, Acme Water Works - Inc - Station 1000 (AB66242), 1234 Main Avenue, Suite 500, Sacramento, CA, 95825, 221310, Sell and install water supply systems, 75, No, Yes, Yes, 5, C60, 8, 25, 43950,</td>
</tr>
<tr>
<td>7</td>
<td>Employer detailed establishment &amp; employee data row 6</td>
<td>7654321, Acme Water Works - Inc - Station 2000 (AB66243), 505 Crocker Avenue, Rocklin, CA, 95663, 221311, Sell and install water supply systems, 25, No, No, No, 4, C40, 9, 7, 65286,</td>
</tr>
<tr>
<td>8</td>
<td>Employer detailed establishment &amp; employee data row 7</td>
<td>7654321, Acme Water Works - Inc - Station 2000 (AB66243), 505 Crocker Avenue, Rocklin, CA, 95663, 221311, Sell and install water supply systems, 25, No, No, No, 5, D10, 8, 5, 65286,</td>
</tr>
<tr>
<td>9</td>
<td>Employer detailed establishment &amp; employee data row 8</td>
<td>7654321, Acme Water Works - Inc - Station 2000 (AB66243), 505 Crocker Avenue, Rocklin, CA, 95663, 221311, Sell and install water supply systems, 25, No, No, No, 5, D20, 8, 13, 65286,</td>
</tr>
<tr>
<td>10</td>
<td>Employer detailed establishment &amp; employee data row 9</td>
<td>1231231, Acme Water Works - Inc - Station 3000 (AB66244), 444 North 54th Street, Reno, NV, 89501, 221312, Sell and install water supply systems, 50, No, Yes, No, 4, C60, 8, 2, 3200,</td>
</tr>
<tr>
<td>11</td>
<td>Employer detailed establishment &amp; employee data row 10</td>
<td>1231231, Acme Water Works - Inc - Station 3000 (AB66244), 444 North 54th Street, Reno, NV, 89501, 221312, Sell and install water supply systems, 50, No, Yes, No, 5, D10, 6, 1, 1600,</td>
</tr>
<tr>
<td>12</td>
<td>Employer detailed establishment &amp; employee data row 11</td>
<td>1231231, Acme Water Works - Inc - Station 3000 (AB66244), 444 North 54th Street, Reno, NV, 89501, 221312, Sell and install water supply systems, 50, No, Yes, No, 5, B40, 7, 1, 1750,</td>
</tr>
<tr>
<td>13</td>
<td>Employer detailed establishment &amp; employee data row N</td>
<td>Continue entering combination of job category, race/ethnicity/sex, and pay band for each establishment.</td>
</tr>
</tbody>
</table>
## Appendix C: Release Notes

### Release 1.1

The following changes have been made in Release 1.1:

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Section / Page</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excel Template</td>
<td>Instructions Worksheet</td>
<td>Minor clarifications, including replacing references to the EEO-1 Instruction Booklet with equivalent guidance.</td>
</tr>
<tr>
<td>Excel Template</td>
<td>Section I – Employer Information</td>
<td>Added the ability to input alphanumeric characters in the <strong>EDD ZIP Code</strong> field.</td>
</tr>
<tr>
<td>Excel Template</td>
<td>Section I – Employer Information</td>
<td>Added the ability to input alphanumeric characters in the <strong>HQ ZIP Code</strong> field.</td>
</tr>
<tr>
<td>Excel Template</td>
<td>Section I – Employer Information</td>
<td>Added the ability to input alphanumeric characters in the <strong>Parent Company ZIP Code</strong> field.</td>
</tr>
<tr>
<td>Excel Template</td>
<td>Section I – Employer Information</td>
<td>Added the ability to input alphanumeric characters in the <strong>Contact ZIP Code</strong> field.</td>
</tr>
<tr>
<td>Excel Template</td>
<td>Section II.A – Establishment Information</td>
<td>Added the ability to input alphanumeric characters in the <strong>Establishment ZIP Code</strong> field.</td>
</tr>
<tr>
<td>User Guide</td>
<td>N/A</td>
<td>Minor clarifications and cleanup.</td>
</tr>
<tr>
<td>Portal</td>
<td>Section I – Employer Information Data Record Page</td>
<td>Added the ability to input alphanumeric characters in the <strong>EDD ZIP Code</strong> field.</td>
</tr>
<tr>
<td>Portal</td>
<td>Section I – Employer Information Data Record Page</td>
<td>Added the ability to input alphanumeric characters in the <strong>HQ ZIP Code</strong> field.</td>
</tr>
<tr>
<td>Portal</td>
<td>Section I – Employer Information Data Record Page</td>
<td>Added the ability to input alphanumeric characters in the <strong>Parent Company ZIP Code</strong> field.</td>
</tr>
<tr>
<td>Portal</td>
<td>Section I – Employer Information Data Record Page</td>
<td>Added the ability to input alphanumeric characters in the <strong>Contact ZIP Code</strong> field.</td>
</tr>
<tr>
<td>Portal</td>
<td>Section II – Establishment Information and Employment Detail Data Record Page</td>
<td>Added the ability to input alphanumeric characters in the <strong>Establishment ZIP Code</strong> field.</td>
</tr>
<tr>
<td>Portal</td>
<td>Certification and Submission Page</td>
<td>Added the ability to input alphanumeric characters in the <strong>ZIP Code</strong> field.</td>
</tr>
<tr>
<td>Excel Template</td>
<td>Section II.A – Establishment Information</td>
<td>Changed the maximum characters in the <strong>Establishment ID</strong> field from 7 to 10.</td>
</tr>
<tr>
<td>Excel Template</td>
<td>Section II.B – Employment Information</td>
<td>Clarified instructions for the <strong>Hours Worked</strong> field. The value should rounded to the nearest whole number.</td>
</tr>
<tr>
<td>User Guide</td>
<td>Appendix B – B.3 Section II – Establishment Information and Employee Detail Record Layout</td>
<td>Changed the maximum characters in the <strong>Establishment ID</strong> field from 7 to 10.</td>
</tr>
<tr>
<td>User Guide</td>
<td>Appendix B – B.3 Section II – Establishment Information and Employee Detail Record Layout</td>
<td>Clarified instructions for the <strong>Hours Worked</strong> field. The value should rounded to the nearest whole number.</td>
</tr>
<tr>
<td>Portal</td>
<td>Section II – Establishment Information and Employee Detail Data Record Page</td>
<td>Clarified the validation message for the <strong>Hours Worked</strong> field to indicate the value must be a whole number.</td>
</tr>
<tr>
<td>Excel Template</td>
<td>Section I – Employer Information</td>
<td>Added instructions on the use of the “OT” selection value to the <strong>EDD State, HQ State, Parent Company State, and Contact State</strong> fields.</td>
</tr>
<tr>
<td>Excel Template</td>
<td>Section II.A – Establishment Information</td>
<td>Added instructions on the use of the “OT” selection value to the <strong>State</strong> field.</td>
</tr>
</tbody>
</table>
Release 2.0
The following changes have been made in Release 2.0:

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Section / Page</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portal</td>
<td>N/A</td>
<td>The Pay Data Reporting Portal has been migrated to the Salesforce platform. Numerous user interface changes.</td>
</tr>
<tr>
<td>User Guide</td>
<td>N/A</td>
<td>The Pay Data Reporting Portal has been migrated to the Salesforce platform. Numerous user interface changes.</td>
</tr>
<tr>
<td>Excel Template</td>
<td>N/A</td>
<td>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.</td>
</tr>
<tr>
<td>.CSV Template</td>
<td>N/A</td>
<td>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.</td>
</tr>
</tbody>
</table>

Release 3.0
The following changes have been made in Release 3.0:

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Section / Page</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portal</td>
<td>N/A</td>
<td>Updated for the 2021 filing season. Changes include updated page navigation and update pay band intervals.</td>
</tr>
<tr>
<td>User Guide</td>
<td>N/A</td>
<td>Updated for Version 3.0 of the Portal.</td>
</tr>
<tr>
<td>Excel Template</td>
<td>N/A</td>
<td>Removed the Submission Upload ID column.</td>
</tr>
<tr>
<td>.CSV Template</td>
<td>N/A</td>
<td>Removed the Submission Upload ID column.</td>
</tr>
</tbody>
</table>