California Pay Data Reporting Portal

USER GUIDE

CALIFORNIA CIVIL RIGHTS DEPARTMENT

REPORTING YEAR 2024

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1. Introduction

The California Pay Data Reporting User Guide is designed to introduce users to the filing process and equip an employer to successfully file a pay data report. The objective of the user guide is to provide technical information on creating, accessing, or editing an account, and other relevant information in the online Portal. However, the user guide is not designed to address all the legal or technical issues that might arise in the filing of a pay data report. For detailed information not covered in the user guide, refer to other current supplemental resources such as the handbook, frequently asked questions (FAQs), template instructions, Excel templates, and CSV examples at https://calcivilrights.ca.gov/paydatareporting. The guidance provided by CRD is to assist employers in complying with Government Code § 12999, but it does not constitute legal advice.

1.1 User Guide Overview

The user guide explains the process for an employer to create and submit Payroll Employee Reports and/or Labor Contractor Employee Reports. An employer must submit its report(s) through CRD's online pay data reporting portal using one of three available methods: 1) uploading an Excel file using the Excel template provided by CRD; 2) uploading a CSV file using the template provided by CRD; or 3) manually entering information using the portal's fillable form. CRD recommends using either option 1 or 2. CRD will not accept reports by email or hard copy.

This user guide is organized into the following sections:

Introduction	Introduces this user guide and overviews the content of a pay data report.
Basic Structure of the California Pay Data	Describes the basic structure of the pay data report. The description includes how single- and multiple-establishment employers report both payroll and labor contractor employees.
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 an existing employer record or create a new employer record.
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.

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2. Overview of the California Pay Data Report's Content

The deadline for filing pay data reports is the second Wednesday of May each year. For pay data reports covering Reporting Year 2024, the filing deadline is **May 14, 2025**. There are two types of California pay data reports: the Payroll Employee Report, which covers an employer's payroll employees, and the Labor Contractor Employee Report, which covers an employer's workers hired through labor contractors. Employers may be required to file one or both types of reports, depending on the employer's staffing levels in the reporting year.

2.1 Payroll Employee Report

In a Payroll Employee Report, an employer reports its payroll employees. A payroll employee is an employee for whom the employer is required to withhold federal social security taxes from that individual's wages, including full-time and part-time employees. In a Payroll Employee Report, an employer groups its payroll employees by establishment, job category, pay band, race, ethnicity, and sex. In addition, for each group of employees in the same job category, pay band, race, ethnicity, and sex, employers are required to report employee counts by remote worker status, mean and median hourly rates, and total hours worked in the reporting year.

To build its pay data report(s), the employer will need to:

- Create a "snapshot" of the employer's payroll employees on a specific pay period to identify the employees who must be reported.
  - To create a snapshot, the employer selects a single pay period between October 1, 2024, and December 31, 2024 ("Snapshot Period").
    - A "snapshot" needs to be selected because throughout the course of a year an employer's employees may change.
  - All employees assigned to a California establishment and/or working within California during the Snapshot Period <u>must</u> be included in the employer's Payroll Employee Report.
- Report, identify, or calculate each payroll employee's:
  - Establishment
  - Job category
  - Race, ethnicity, and sex
  - Remote worker status: the number of employees that do not work remotely, work remotely while located in California, or work remotely while located outside of California.
  - Earnings in 2024 (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, 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.

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- o Number of hours worked in 2024 (not just during the Snapshot Period).
    - ▪ Include the number of hours an 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.
  - o Hourly rate
- Group payroll employees with the same establishment, job category, pay band, and race/ethnicity/sex. Then, total the number of payroll employees in each group, identify the number of employees by remote worker status, and calculate the group's mean hourly rate, median hourly rate, and the total hours worked for the group in the reporting year.
  - o A group may have only one payroll employee, and be reported as such, if no other payroll employee shares the same combination.
  - o The mean hourly rate is calculated by adding the individual hourly rates for each payroll employee in the group, then dividing that sum by the number of employees in the group. (If using a spreadsheet to create an employee detail, use the @average function.)
  - o The median hourly rate is calculated by ordering the individual hourly rate for each payroll employee in the employee group from smallest to largest and selecting the middle number. (If using a spreadsheet to create an employee detail, use the @median function.)
  - o There are 2,880 possible combinations of job category, pay band, and race/ethnicity/sex:
    - ▪ 10 job categories x 12 pay bands x 24 race/ethnicity/sex combinations = 2,880
- Gather other required employer and establishment level information, as well as any explanatory information that may need to be noted in the clarifying remarks fields.

2.2 Labor Contractor Employee Report

In a Labor Contractor Employee Report, a client employer reports data on their employees contracted from a labor contractor. A labor contractor's employee is an employee for whom a labor contractor is required to withhold federal social security taxes from that individual's wages, including both full-time and part-time employees, and who performs labor for a client employer within the client employer's usual course of business. In a Labor Contractor Employee Report, an employer groups its labor contractor employees by establishment, labor contractor and their FEINs, job category, pay band, race, ethnicity, and sex. In addition, for each group of employees in the same job category, pay band, race, ethnicity, and sex, employers are required to report employee counts by remote worker status, mean and median rate hourly rates, and total hours worked in the reporting year.

To build its pay data report(s), the employer will need to:

- Create a "snapshot" of the employer's labor contractor employees to identify the labor contractor employees who must be reported.
  - o The Snapshot Period may vary for each Labor Contractor a client employer uses.

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- o For additional guidance, review the [2024 California Pay Data Reporting Handbook](#).
- Report, identify, or calculate each labor contractor employee's:
  - o Establishment
  - o Labor Contractor(s) FEIN
  - o Snapshot Period
  - o Job category
  - o Race and/or ethnicity and sex
  - o Remote worker status: the number of employees that do not work remotely, work remotely while located in California, or work remotely while located outside of California.
  - o Earnings in 2024 (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, 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.
  - o Number of hours worked in 2024 (not just during the Snapshot Period).
    - ▪ Include the number of hours an 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.
  - o Hourly rate
- Group labor contractor employees with the same establishment, labor contractor, job category, pay band, and race/ethnicity/sex. Then, total the number of labor contactor employees in each group, identify the number of employees by remote worker status, calculate the group's mean hourly rate, median hourly rate, and the total hours worked in the reporting year.
  - o A group may have only one labor contractor employee, and is reported as such, if no other labor contractor employee shares the same combination.
  - o Identify the number of labor contractor employees by remote worker status for the group of labor contractor employees (see [section 3.1](#) for detailed description).
  - o The mean hourly rate is calculated by adding the individual hourly rates for each labor contractor employee in the group, then dividing that sum by the number of employees in the group (if using a spreadsheet to create an employee detail, use the @average function).
  - o The median hourly rate is calculated by ordering the individual hourly rates for each labor contractor employee in the labor contractor employee group from smallest to largest and selecting the middle number (if using a spreadsheet to create an employee detail, use the @median function).

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- o If a labor contractor employee has worked for more than one client employer over the course of the calendar year, their hours worked should be allocated respectively to each client employer, based on the hours of work performed for that client employer.
- o There are 2,880 possible combinations of job category, pay band, and race/ethnicity/sex:
  - ▪ 10 job categories x 12 pay bands x 24 race/ethnicity/sex combinations = 2,880
- Gather other required employer and establishment level information, as well as any explanatory information that may need to be noted in the clarifying remarks fields.

3. Basic Structure of the California Pay Data Report

An employer's pay data report – whether a Payroll Employee Report or a Labor Contractor Employee Report – has three sections: (a) Employer Information, which is information added to the report in the portal; (b) Establishment Information, which is information the employer provides about its establishments that California employees are assigned; and (c) Employee Detail, which describes the pay data information for the employer California employees. Provided below are key terms used in this user guide, followed by several illustrations that demonstrate how a pay data report is structured.

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3.1 Key Terms

Employer

- A Payroll Employee Report covers only a <u>single</u> employer.
- A Labor Contractor Employee Report covers only a <u>single</u> client employer but includes data from all the employer's labor contractors.
- For more information about which employers are required to file a Payroll Employee Report and/or a Labor Contractor Employee Report, including guidance on how to determine if an employer has the requisite number of employees, see pay data handbook.

Establishment

- An establishment is an economic unit producing goods or services, such as a factory, office, store, or mine.
- A pay data report covers each of an employer's establishments to which one or more California employees are assigned.
- A multiple-establishment employer must report all its California establishments, including those with fewer than 50 employees, in the same manner.
- For more information, see the California Pay Data Reporting: Frequently Asked Questions: What does "establishment" mean? What does it mean for an employee to be "assigned to" an establishment?

Employee Types

- There are two type of employees that must be reported:
  - Payroll Employees
  - Labor Contractor Employees
    - Each of these employee types requires a separate pay data report to be filed. An employer that has more than 100 payroll employees and more than 100 labor contractor employees will have to file two reports with CRD.

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Employee Detail

- For Payroll Employee Reports, payroll employees at an establishment are organized into groups that share the same combination of job category, race, ethnicity, sex, and pay band.

- For Labor Contractor Employee Reports, labor contractor employees at an establishment are organized into groups that share the same combination of labor contractor, job category, race, ethnicity, sex, and pay band.

- Employers report the number of employees in the same group and report the mean hourly rate, median hourly rate, and total number of hours worked by this group in the Reporting Year.

- There are 2,880 possible combinations of job category, pay band, and race/ethnicity/sex:
  - 10 job categories x 12 pay bands x 24 race/ethnicity/sex combinations = 2,880

- 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 reporting remote worker status, report the number of employees in the detail that work from their assigned establishment, work remotely while located in California or work remotely while located outside of California.

For example, assume that an employer has 100 employees. Of these, ten are Sales workers, Latina, and Female; each made between $41,080 and $53,039 during the reporting year. This group would be reported in Employee Detail of the pay data report with the following employee details:

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

Job Categories	**Race/Ethnicity/Sex**	**Pay Bands**
1. Executive or 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 - $24,959
3. Professionals	A30 - Hispanic/Latino - Non-Binary	3. $24,960 - $32,239
4. Technicians	B10 - Non-Hispanic/Non-Latino - Male - White	4. $32,240 - $41,079
5. **Sales workers**	B20 - Non-Hispanic/Non-Latino - Male - Black or African American	5. **$41,080 - $53,039**
6. Etc.	Etc.	6. Etc.

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Remote Employees

Employers must identify the remote worker status of each employee. A remote employee is defined as an employee who has no expectation to regularly report in person to a physical establishment to perform work duties.

- "Number of employees that do not work remotely" (Column Q) records all the employees in this employee detail that report to their assigned establishment and work there regularly. These are traditional, non-remote employees.

- "Number of remote employees located with California" (Column R) records employees in this employee detail who do not regularly report to their establishment and reside within California.

- "Number of remote employees located outside of California" (Column S) records employees in this employee detail who do not regularly report to their establishment and reside outside of California.

- For each employee group reported at the establishment, the relationship between the "Number of Employees" (Column P) and Columns Q, R, and S is as follows:

    Columns P = Q + R + S where
    - Column P is the total number of employees in the employee group report at the establishment
    - Column Q is the number of employees that do not work remotely
    - Column R is the number of remote employees located within California
    - Column S is the number of remote employees located outside of California

Payroll and Labor Contractor Excel templates are designed to highlight rows with a red font for rows where this relationship is incorrect.

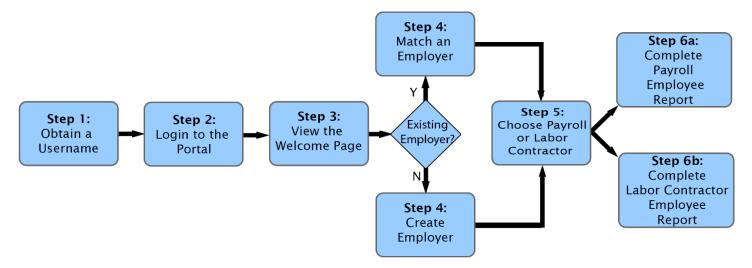THIS DOCUMENT IS ONLY VALID FOR REPORTING YEAR 2024

3.2 Determine Report Type: Payroll Employee Report or Labor Contractor Employee Report

You will need to determine the type of report(s) you are submitting: a Payroll Employee Report, a Labor Contractor Employee Report, or both. An employer that is obligated to submit both report types would complete both Step 6a and Step 6b in the image below.

An employer submitting a Labor Contractor Employee Report submits one report that covers its labor contractor workers at all the employer's establishments, even if the employer uses more than one labor contractor.
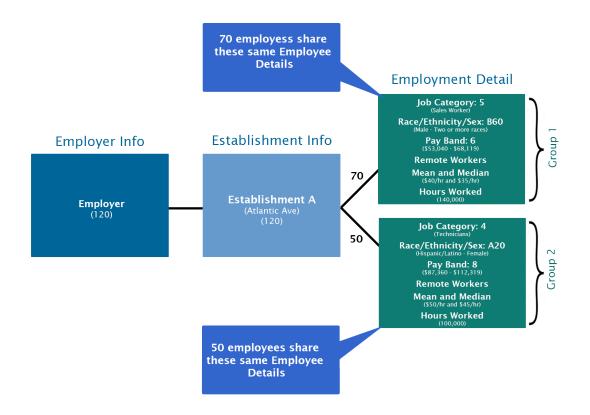
3.3 Single-Establishment Employer

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

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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.

70 employess share these same Employee Details

Employment Detail

Employer Info

Establishment Info

Employer
(120)

Establishment A
(Atlantic Ave)
(120)

70

50

Job Category: 5
(Sales Worker)
Race/Ethnicity/Sex: B60
(Male - Two or more races)
Pay Band: 6
($53,040 - $68,119)
Remote Workers
Mean and Median
($40/hr and $35/hr)
Hours Worked
(140,000)

Group 1

Job Category: 4
(Technicians)
Race/Ethnicity/Sex: A20
(Hispanic/Latino - Female)
Pay Band: 8
($87,360 - $112,319)
Remote Workers
Mean and Median
($50/hr and $45/hr)
Hours Worked
(100,000)

Group 2

50 employees share these same Employee Details

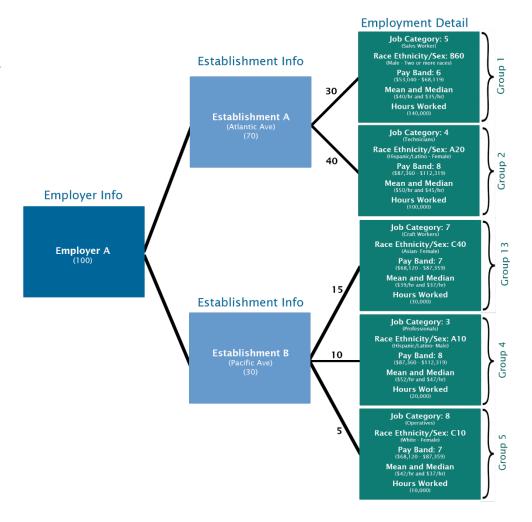THIS DOCUMENT IS ONLY VALID FOR REPORTING YEAR 2024

3.4 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 3 (15 employees)
  - Group 4 (10 employees)
  - Group 5 (5 employees)
  - Each group represents all employees who share the same combination of job category, race/ethnicity/sex, and pay band.

Employment Detail

Establishment Info

Establishment A (Atlantic Ave) (70)

30 — Job Category: 5 (Sales Worker), Race Ethnicity/Sex: B60 (Male - Two or more races), Pay Band: 6 ($53,040 - $68,119), Mean and Median ($40/hr and $35/hr), Hours Worked (140,000) — Group 1

40 — Job Category: 4 (Technicians), Race Ethnicity/Sex: A20 (Hispanic/Latino - Female), Pay Band: 8 ($87,360 - $112,319), Mean and Median ($50/hr and $45/hr), Hours Worked (100,000) — Group 2

Employer Info

Employer A (100)

Establishment Info

Establishment B (Pacific Ave) (30)

15 — Job Category: 7 (Craft Workers), Race Ethnicity/Sex: C40 (Asian- Female), Pay Band: 7 ($68,120 - $87,359), Mean and Median ($39/hr and $37/hr), Hours Worked (30,000) — Group 13

10 — Job Category: 3 (Professionals), Race Ethnicity/Sex: A10 (Hispanic/Latino- Male), Pay Band: 8 ($87,360 - $112,319), Mean and Median ($52/hr and $47/hr), Hours Worked (20,000) — Group 4

5 — Job Category: 8 (Operatives), Race Ethnicity/Sex: C10 (White - Female), Pay Band: 7 ($68,120 - $87,359), Mean and Median ($42/hr and $37/hr), Hours Worked (10,000) — Group 5
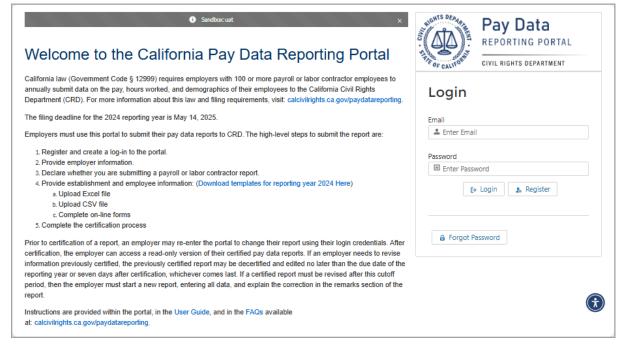
4. Portal Overview

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 6: Submitting the Pay Data Report.

4.1 Welcome Page

Welcome Page

- This is the first page displayed upon accessing the online Portal.
- This page provides information about filing requirements and links to helpful resources.
- Once a user logs in to the online Portal, they have access to Pay Data Reporting Portal and the reports they have filed.

Actions Available

1. Log into the online Portal.
2. Register a new user.
3. Reset a forgotten password.

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4.2 User Registration Page

User Registration Dialogue

- This page allows registered users to log into the online Portal.
- Detailed instruction can be found in Section 5 [Logging into the online Portal](#).

Actions Available

1. Register a new user.

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4.3 Pay Data Home Page

Pay Data Home Page

- This page is the jumping off point for the pay data online Portal. From here, you can navigate throughout the portal.

Actions Available

1. Start a New Submission.
2. Resume a Submission.
3. Review Certified Submissions.
4. Review Employer Information.
5. Edit User Information.

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4.4 Pay Data Reports Page

Pay Data Reports Page

- This page provides a list of all pay data reports for an employer.
- While an employer can have more than one certified report for the same reporting year listed on this page, CRD will use the most recently certified report.
- 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 certifies a corrected report.
- Under this scenario, both reports will display, but only the most recently certified report would be considered the certified report for the reporting year by CRD.

Actions Available

1. Edit or Review a pay data report.
2. View Pay Data Report Charts visualizing the employer's certified data on its workforce.
3. Navigate the pay data portal.

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4.5 Employer Information Detail Page

Employer Info Page

- This page displays the Employer Information for a given pay data report.
- So, whereas the pay data reports list page displays reports, this page displays the contents within a report.
- The Employer Info page is the first of three steps to complete the report.

Actions Available

1. View and/or edit the: Employer Information data record.
2. Complete the Total number of U.S. establishments and Total U.S. payroll employees' fields.
3. Designate a particular address as the employer's headquarters.
4. If the employer filing the current pay data report has a parent company, it should be declared.
5. If the employer filing the current pay data report has affiliated companies who's pay data is included in this report, they should be declared.

4.6 Submission Info

Submission Info Page

- This page allows the user to enter a summary of their pay data report.
- The data collected includes snapshot dates, the number of establishments reported, and the number of employees reported.

Actions Available

1. Enter or edit Snapshot Period data.
2. Enter or edit the number of establishments report.
3. Enter or edit the number of employees in the report.

!

- *Snapshot Period dates are only collected for Payroll Employee Reports on the Submission info page.*
- *Since the 2022 Pay Data filing season, CRD only collects California employee pay data. CRD no longer collects non-California employee data on the Submission info page.*
- *Although CRD does not collect pay data on non-California employees, it is possible to have to report non-California establishments if they have California employees reporting to them.*

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4.7 Establishment & Employee Detail Page

Establishment & Employee Detail Page

- This page displays Establishment & Employee Detail for a given pay data report.
- Use the **Import Data** button to upload a completed Excel or CSV file (Excel templates/CSV examples available at: https://calcivilrights.ca.gov/paydatareporting). Uploading a completed Excel file is the preferred way to file a pay data report.
- To navigate to related Establishment data records, click the **Edit** button.

Actions Available

1. Upload pay data reports using the **Import Data** button.
2. Edit Establishment data that has been uploaded or manually enter using the **Edit** button.
3. To enter establishment information manually, select the **New Establishment** button.
4. Delete an Establishment's data using the **Delete** button. Deleted data can no longer be edited.

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4.8 Create New Establishment Page

Entering Establishment Information Manually

- This page allows the user to enter establishment information manually.

Actions Available

1. Enter or edit establishment information.
2. When data is correct, select the **Create** button to enter/update this data in the portal.

!   - *If you choose to upload an Excel or CSV file, you will not encounter this dialogue.*

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4.9 Establishment and Employee Detail Page

Establishment and Employee Detail Page

- This page displays the contents of the employee details assigned to a particular establishment.

Actions Available

1. View, edit, correct, and save information for employee details.
2. Manually create and save the employee detail portion of a data record.
3. Manually delete employee detail records by deleting all employee detail records.

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4.10 Certification and Submission Page

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 CRD, this page requires employers to certify the accuracy of the report for official submission to CRD.

- A pay data report is not complete until it is certified by an official of the employer (not a third party).

- Contact information is captured for the point of contact for the employer.

- Contact information about the certifying official is captured.

- This page is the final step to complete the report.

Actions Available

1. Certify a pay data report for final submission to CRD.
2. Click the links in the blue box in the upper left of the portal to navigate through your report.
3. Navigate back into the portal to update the pay data report by clicking the **Previous** button.

4.10.1 Certification and Submission Charts

Certification and Submission

- After certification is complete, the portal will produce a graphical representation of your pay data.
- An email with proof of certification will be sent to the point of contact.

Actions Available

- Select **Download as a PDF** to download a PDF of this graphic report.

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5. Logging Into the online Portal

5.1 Option I: New User Login

Option I
New User Login

This option will be used by each user accessing the pay data online Portal for the first time. For returning users, refer to Option II: Existing 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.

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5.1.1 Step 1: Obtain a Username

A

• Select **Register**.

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A

- Enter the new user's First Name, Last Name, Title, and Email to begin the registration process.

B

- 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.

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5.1.2 Step 2: Login to the Portal

Change Your Password

Enter a new password for **todd.tester@yourmail.com**

Make sure to include at least:

- ○ 15 characters
- ○ 1 uppercase letter
- ○ 1 lowercase letter
- ○ 1 number
- ○ 1 special character ⓘ

* New Password

[_____] **A**

* Confirm New Password

[_____]

[Change Password] **B**

Password was last changed on 1/10/2023 4:35 PM.

A

- Enter a 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.

B

- Select **Change Password** to set the password for accessing the portal.
- Securely record the Password as it will be required when re-entering the portal to view or edit pay data.

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5.2 Option II: Existing User Login

Option II

Existing User Login

This option will be used by each user returning to the pay data online 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.

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5.2.1 Step 1: Login to the Portal

A

- Enter the Username created when first accessing the portal.
- Enter the Password created when first accessing the portal.

B

- Select **Login**.

C

- In the event of a lost password, select **Forgot Password**.
- See Step 4 for details.

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5.2.2 Step 2: View the Welcome Page

- The Welcome Page gives the user several options for navigating the pay data online Portal. Both the menus at the top of the page and the button in the body of the page are used to navigate.

A

- Select **My Pay Data Reports** to view your pay data reports.

B

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

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5.2.3 Step 3: View Pay Data Reports

A

- The portal will display all pay data reports associated to the user.

Actions Available

1. Pay data reports can be exported.
2. Pay data reports can be edited.
3. Pay data charts can be viewed.
4. Reports can be decertified or discarded.

!

- *Both Payroll and Labor Contractor Employee Reports are listed on the My Pay Data Reports page.*
- *Pay data reports are associated with the user who filed the report. This allows different users to file reports on behalf of employees. This is helpful if a user leaves an employer or for a professional who files pay data reports on behalf of employers.*

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5.2.4 Step 4: Forgotten Password

A

- Enter the Username created when first accessing the portal.

B

- Select **Forgot 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.

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Change Your Password

Enter a new password for **todd.tester.dfeh@gmail.com**.
Make sure to include at least:

○ 15 characters
○ 1 uppercase letter
○ 1 lowercase letter
○ 1 number
○ 1 special character ⓘ

* New Password

A

* Confirm New Password

Change Password **B**

Password was last changed on 1/10/2023 4:35 PM.

A

- 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, including an uppercase letter, a lowercase letter, a number, and a special character.

B

- Select **Change Password** to set the password for accessing the portal.

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6. Submitting the Pay Data Report

The basic structure of the California pay data report consists of employer information, submission information, establishment information and employee detail. After creating a new report (Step 1) and selecting the type of report (Step 2), the user enters employer data (Step 3), followed by submission information (Step 4), and then the establishment information and the employee detail (Step 5). The report can then be certified (Step 6) or withdrawn at any time (Step 6).

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6.1 Create a New Report

6.1.1 Step 1: Start a Submission

- Click **Start a Submission** to begin your report

6.1.2 Step 2: Select Reporting Year

A

- Select the reporting year for your report.

B

- You may click the **Cancel** button to cancel and exit.

> ! *Previous year's report must be filed with the current year's Excel/CSV template.*

6.1.4 Step 4: Employer Selection

A

- Click **Select a previously created employer** if submitting a report for a previously created employer account.

B

- Click **Create and select a new employer** if submitting a report for a new employer account.

C

- Click the **Back** button to choose between submitting a current year report or previous year report.
- Click the **Cancel** button to cancel and exit.

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6.1.5 Step 4a: Select an Existing Employer

A

- Select the Employer from the dropdown menu

B

- Click the **Back** button to display the previous page.
- Click the **Cancel** button to cancel and exit.
- Click the **Next** button to display the Employer Info Page.

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6.1.6 Step 4b: Create a New Employer

A

- Complete the Employer Information Form.
- Fields in red with an "*" are required.

B

- Click the **Back** button to display the previous page.
- Click the **Cancel** button to cancel and exit.
- Click the **Save** button to save the

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6.1.7 Step 5: State of California Contractor Information

- Select from a list of previously created employers.

- Click the **Back** button to display the previous page.
- Click the **Cancel** button to cancel and exit the portal.
- Click the **Next** button to move forward through the portal.

6.1.8 Step 5a: Determine Report Type – Payroll Employee or Labor Contractor Employee Report

A

Choose between submitting a Payroll Employee Report or a Labor Contractor Employee Report.

B

- Click the **Back** button to display the previous page.
- Click the **Cancel** button to cancel and exit.

!

SB 1162 requires employers report their labor contractor employees if they employ 100 or more employees hired through labor contractors. Filing a Labor Contractor Employee Report requires additional information not required as part of a Payroll Employee Report.

Excel templates and CSV examples for both Payroll Employee Reports and Labor Contractor Employee Reports are available here: https://calcivilrights.ca.gov/paydatareporting.

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6.2 Employer Information Data

A

- 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.

B

- 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 end of the field name.
- Two toggle buttons allow designation of this employer location as the headquarters and a parent company.

C

- If multiple affiliates are being reported in the data report, each affiliated company must be listed here (see next page).

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6.2.1 Adding Affiliated Entities to a Pay Data Report

A
- If parent companies are including their affiliates in their pay data report, they are required to list these affiliates.

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...

6.2.2 Submission Information and Snapshots

A

- Enter all required information on the page.
- Employers declare a Snapshot Period date which represents a single pay period between October 1 and December 31.
- Required fields are denoted with a red asterisk ("*") at the end of the field name.

B

- Click the **Previous** button to display the Employer Info Section.
- Click the **Next** button to display the Establishment and Employee Detail Section.

! *The Submission Info page is asking for the number of establishments that have California employees reporting to them and the number of California employees included in the current pay data report.*

If you are filing a Labor Contractor Employee Report, you will not have the option to enter in Snapshot Period dates here. The Snapshot Period dates will be collected when Employee Detail information is collected.

6.3 Establishment Information & Employee Detail Data

6.3.1 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. For instructions on completing a pay data report Excel template, refer to the handbook, FAQs, and template instructions available at https://calcivilrights.ca.gov/paydatareporting.

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

!

The above diagram describes how 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 online Portal only provides Excel downloads).

Alternatively, employers can choose to fix data errors found by the online Portal in their source files and then re-upload a corrected file.

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Upload Excel or CSV file

A

- Click the **Import Data** button to upload an Excel or CSV file. Note that if establishment and employee detail information already exist, clicking this button will delete it to prevent duplicate reporting.

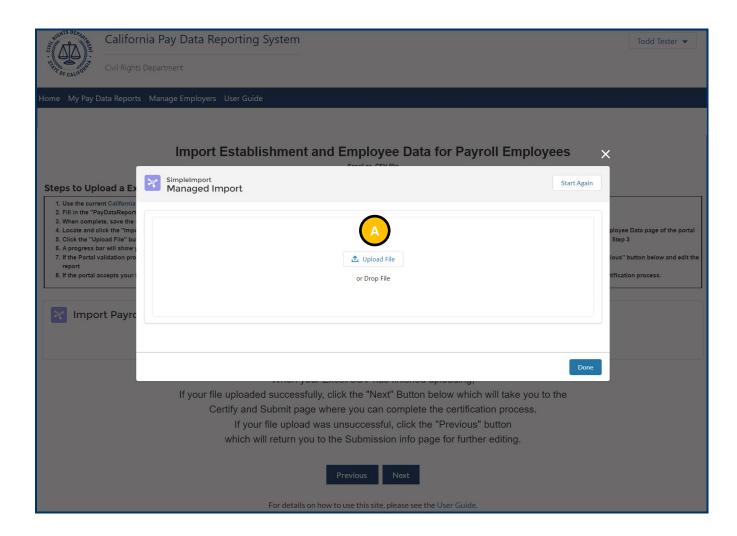THIS DOCUMENT IS ONLY VALID FOR REPORTING YEAR 2024

6.3.2.1 Step 1: Prepare Excel or CSV File

A

- If an Excel template has not been previously downloaded, it can be downloaded by clicking the "California Pay Data Report Template" link.
- Fill in the required data consistent with the instructions provided in the handbook, FAQs, and template instructions available at https://calcivilrights.ca.gov/paydatareporting.
- The pay data portal accepts pay data files in both an Excel and CSV pay data file formats.

B

- The prepared Excel or CSV file can be uploaded directly into the portal.
- Select **Upload File** to upload the prepared Excel/CSV file.

> **!** It is essential that you use the current and appropriate template type. Payroll and Labor Contractor Reports each require the use of separate templates. The templates can be found here: https://calcivilrights.ca.gov/paydatareporting.

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6.3.2.2 Step 2: Upload the Excel or CSV File

- Select **Upload File** to select the Excel/CSV file to upload.
- The portal will then issue a prompt to identify the locally stored Excel file to be uploaded.
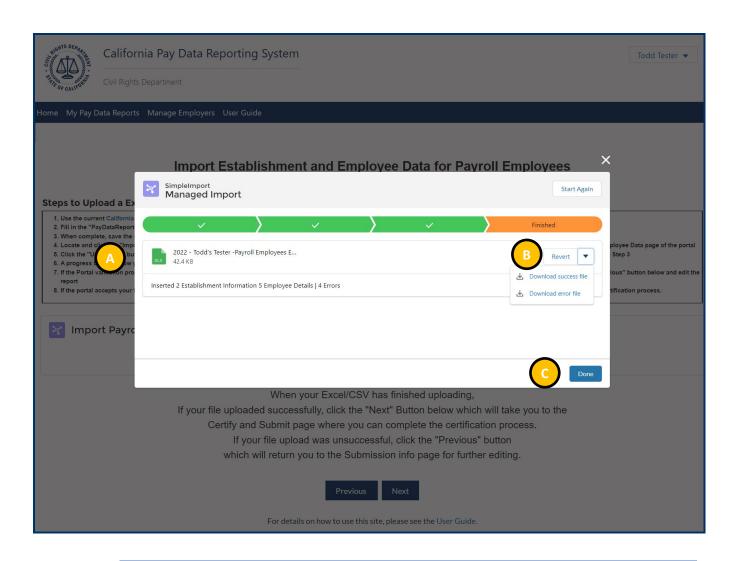- Alternatively, the import file can simply be dragged and dropped into the pop-up area.

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A

- 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 in the Excel/CSV template has been transferred into the portal database.

! *The time it takes for the portal to complete the import process depends on the number of records in the import file. Leave this pop up open until the process is finished.*

A

- The portal displays the results of the import process, including summary of all inserted records, as well as any errors that occurred in the import process.

B

- The **Revert** button allows you to undo all changes, removing all records inserted into the pay data report.
- **Download success file** to view all successfully inserted records.
- **Download error file** to view all errors encountered by the portal during the upload process. The error file can be useful for troubleshooting a report. (see Step 5 for details)

C

- Select **Done** when the upload process is finished.

! *If there are errors in the uploaded Excel/CSV file, download the error file to troubleshoot the error, correct the Excel/CSV file, select the Start Again button, and reload the file.*

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- Once the file has been uploaded into the portal, you are returned to the Import Establishment and Employee Data page.
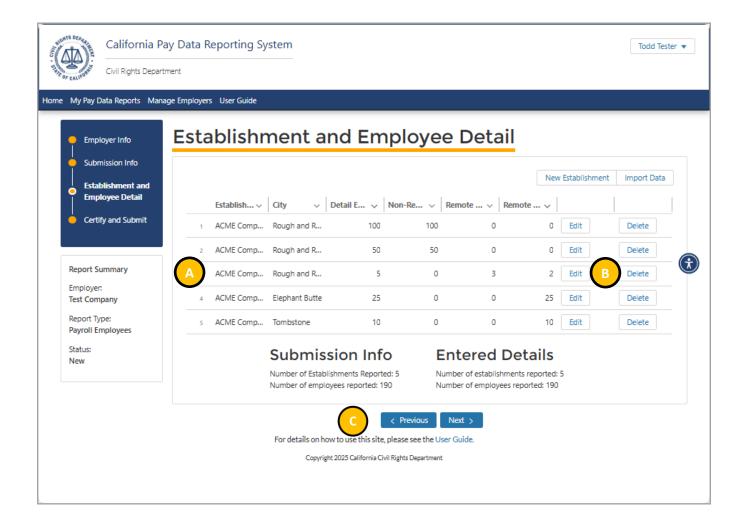
A

- If you received errors, correct the errors in your report and upload again.
- If the problem is with your Submission Info, select the **Previous** button and move backwards through the portal to update Submission Information.

B

- If your file uploaded successfully, finish the process by selecting the **Next** button and moving on to the Certification page.

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6.3.2.3 Step 3: Review Pay Data Report – In case of errors

A

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

B

- 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.
- The **Delete** button allows users to delete the Establishment and its associated Employee Detail records.

C

- Click the **Previous** button to display Submission Info.
- Click the **Next** button to display the Certify and Submit page.

6.3.2.4 Step 4: Correct Data Errors

- 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 titled 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.

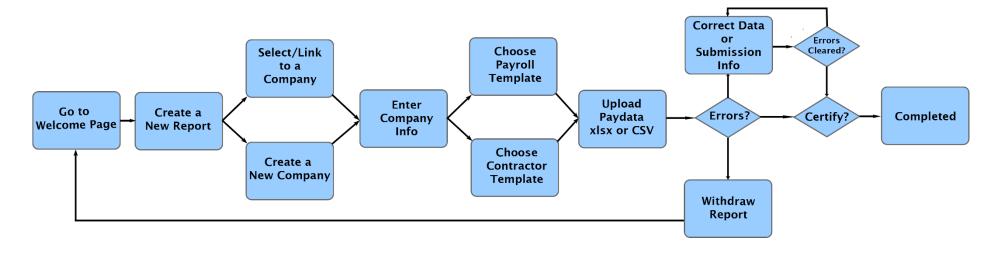- This can be corrected manually (see Option II, Step 2) or by correcting the import file and reuploading it.

6.3.2 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 (this option is most often used when filing reports with a small number of employees).

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.
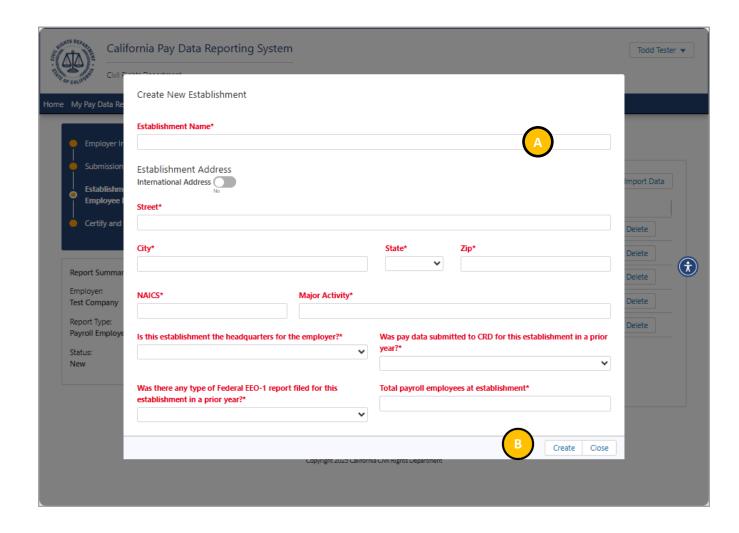
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A

- Click the **New Establishment** button to enter at least one establishment and employee details using the portal's fillable forms.

B

- Click the **Previous** button to display the Submission Info Section.
- Click the **Next** button to display the Certify and Submit page.

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6.3.3.1 Step 1: Enter Establishment Information

A

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

B

- 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.

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6.3.3.2 Step 2: Enter Employee Detail

A

- Click the **New Employee Detail** button to display the Create Employee Detail Record screen.
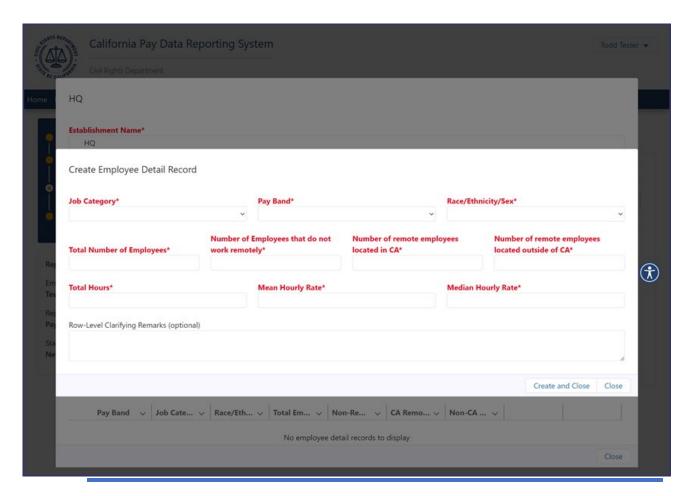
B

- Click the **Close** button to close this screen and return to the Establishment and Employee Detail page.

! *Employee detail records are associated with a specific establishment. Previously entered establishments can be selected in the **Establishment Name** field.*

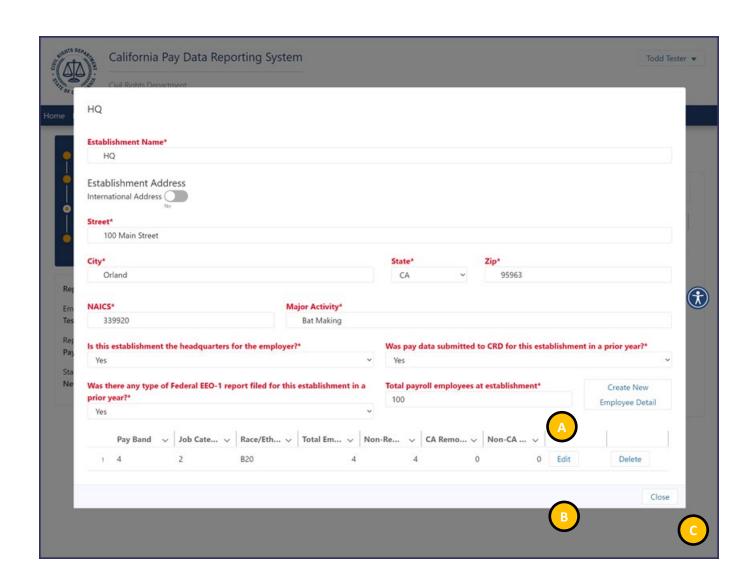THIS DOCUMENT IS ONLY VALID FOR REPORTING YEAR 2024

A

- Enter all required information in the New Employee Detail pop up.
- Required fields are denoted with a red asterisk ("*") at the end of the field name.

B

- After all information is entered, select **Create and Close** 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.

The mean hourly rate is calculated by adding the individual hourly rates for each employee in the group, then dividing that sum by the number of employees in the group.

The median hourly rate is calculated by ordering the hourly rates of each employee in the group from smallest to largest and selecting the middle number.

!

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A

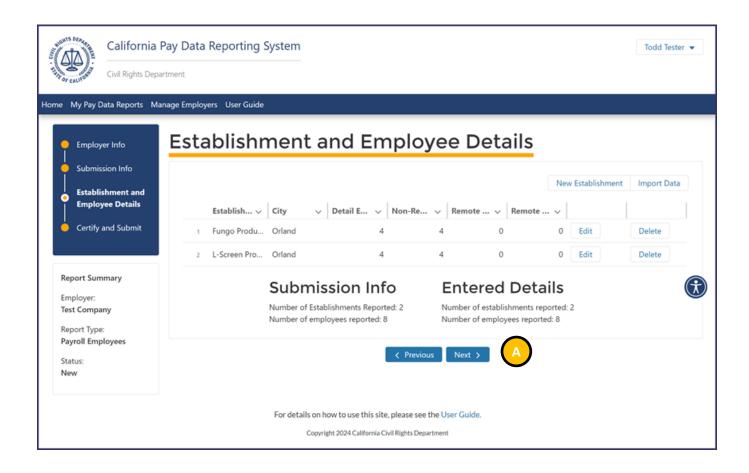- Additional employee details may be created by clicking the **New Employee Detail** button.

B

- Click the **Edit** button to edit the Employee Detail entry.
- Click the **Delete** button to delete the Employee Detail entry.

C

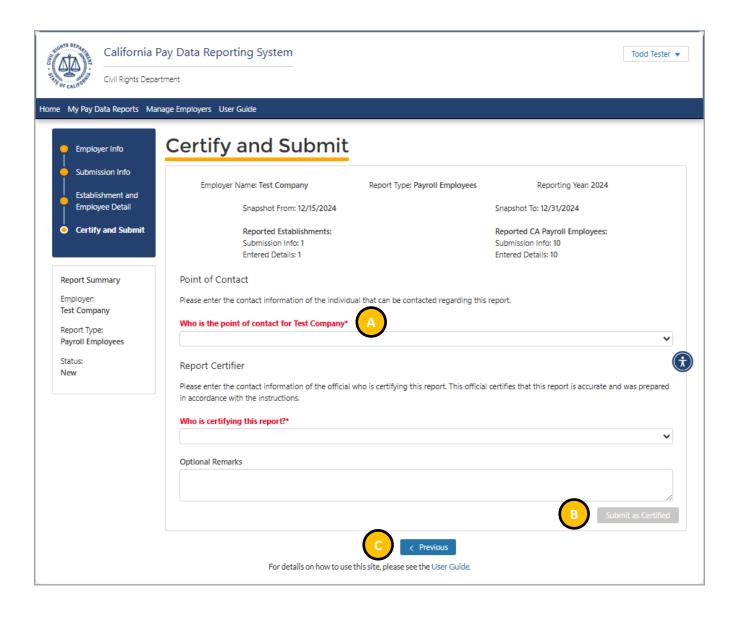- Click the **Close** button to close this screen and return to the Establishment and Employee Detail page.

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A

- Click the **Next** button to display the Certify and Submit page.
- See 6.4 – Certifying the Report for details.

6.4 Certifying the Report

A

- Enter all required information in the Point of Contact and Report Certifier subsections.
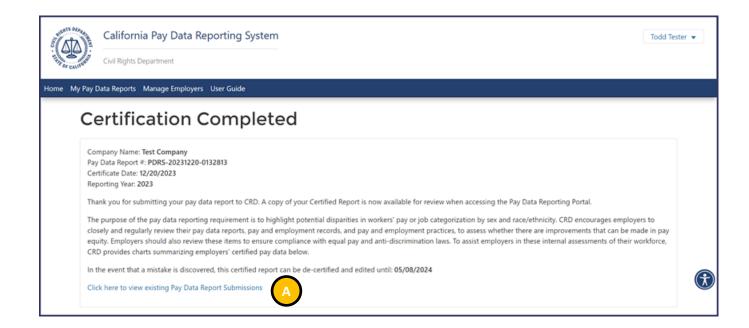- Required fields are denoted with a red asterisk ("*") at the end of the field name.

B

- Click **Submit as Certified**, to submit the information to the portal.

C

- Click the **Previous** button to display the Establishment and Employee Detail page.

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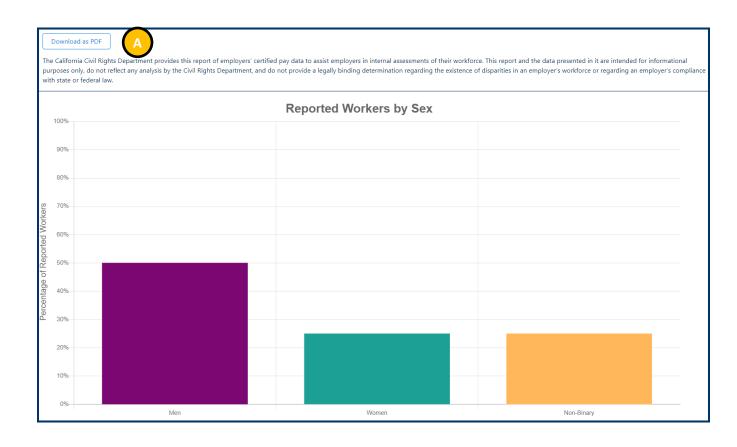
6.4.1 Certification Complete

A

- 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.

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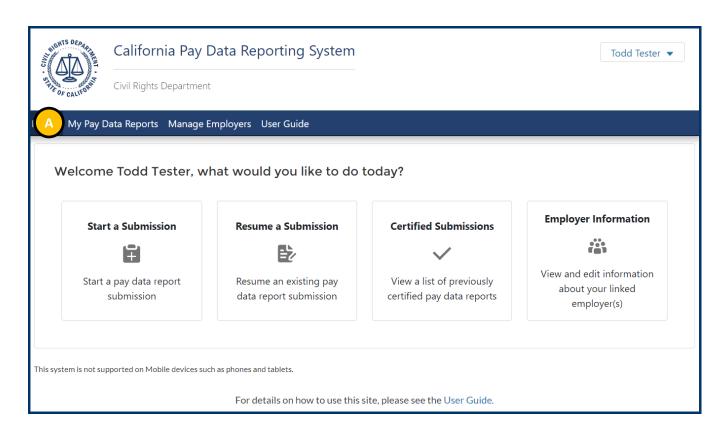
6.4.2 Certification and Submission Charts

- After certification is complete, the portal will produce a graphical representation of your pay data.

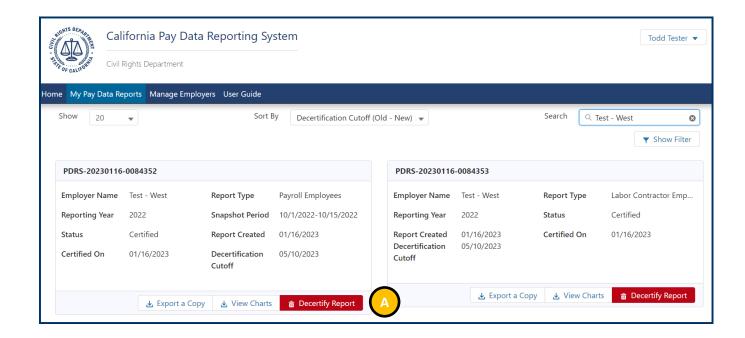- Select **Download as a PDF** to download a PDF of this graphic report.

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6.5 Decertifying the Report

A

- Select **My Pay Data Reports**.

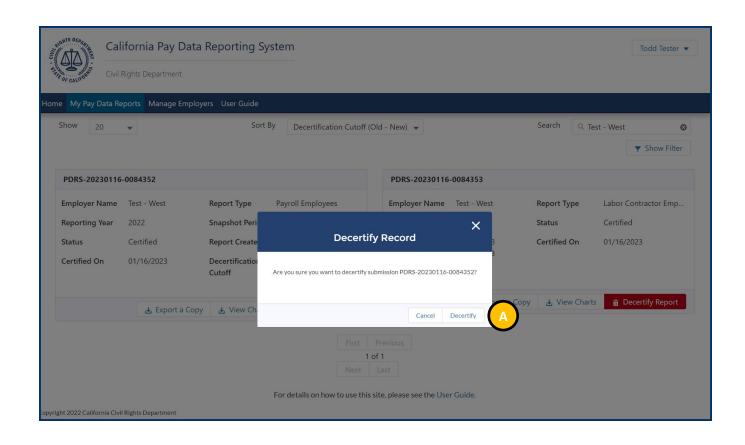THIS DOCUMENT IS ONLY VALID FOR REPORTING YEAR 2024

- Select the **Decertify Report** button on the pay data report you want to decertify.

> ! *Before the filing date (May 14, 2025), a report can be decertified. If a report is filed after the filing date for that particular year, the employer will have a week to decertify the report before it becomes undeletable.*
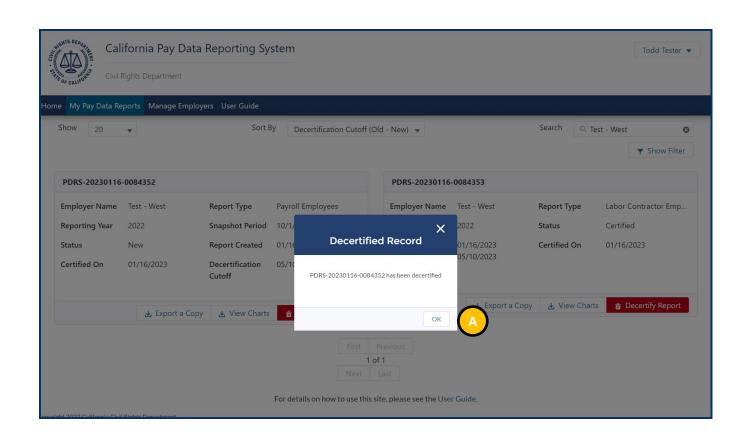
A

- Select the **Decertify** button to confirm your intention to decertify the report.

- If you no longer want to decertify the report, click **Cancel** to cancel and exit the Decertify Record pop-up.
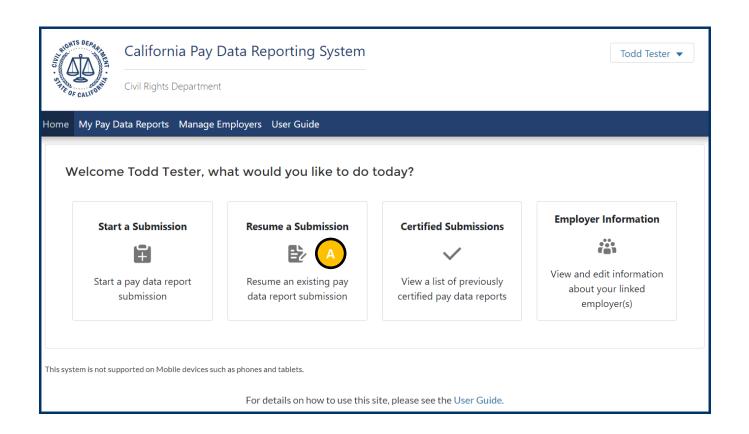
A

- This is the confirmation for decertification of your report.
- Select **OK** to exit.

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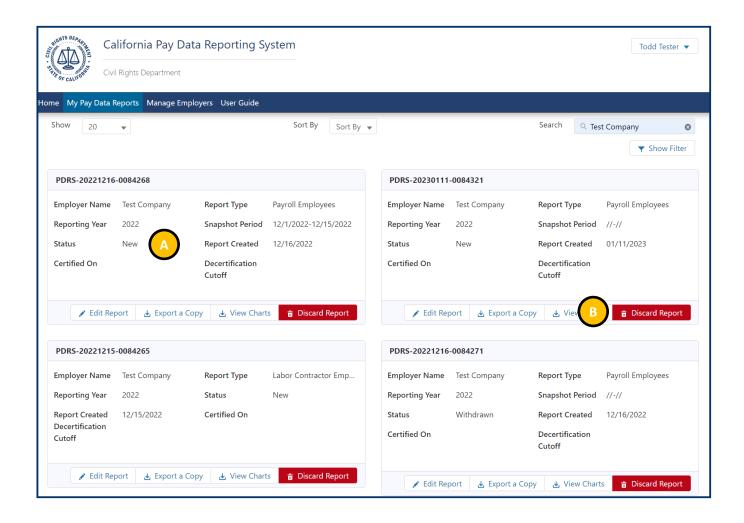
7. Accessing In-Process Reports

A

- 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**.

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8. Options for In-process Pay Data reports

- If **Select a New Report** is selected, only reports with the New status will be displayed.
- Select **Edit Report** for the report to be viewed.

- If the status indicates New, the report can be edited, discarded, or certified (see Section 5 for details).

9. User Guide – Frequently Asked Questions

9.1 Can we submit our payroll data into the pay data portal?
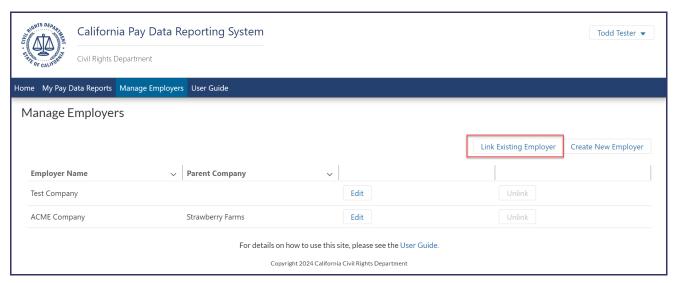
Only pay data reports submitted and certified through the portal will be accepted. Reports may be submitted by uploading an Excel file using CRD's template, uploading a CSV file, or using the portal's fillable forms and must be prepared in accordance with CRD's instructions. If you are reporting more than a handful of employees, we recommend that you download the Excel Template(s) and template instruction(s) for submitting Payroll Employee/Labor Contractor Employee Reports and follow instructions for completing pay data reports in the handbook, template instructions, FAQs, and other supplementary resource materials provided by CRD.

9.2 How do I switch the user who files the pay data report for my employer?

The California Pay Data Reporting Portal allows multiple users to access the portal on behalf of a single employer. If a new or different user is going to file a pay data report for an employer moving forward, you should register the user and then link that user to the employer. The advantage of this approach is that it allows a Payroll Specialist to access the portal for various clients.

The process involves two steps:

1. Register as a new user or log in to pay data online Portal if you already have a User Account
2. Link to the Employer

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9.3 What if the labor contractor refuses to provide the required labor contractor employee data?

Employers that are unable to submit a complete and timely Labor Contractor Employee Report due to the failure of one or more labor contractors to provide data should email PayDataReporting@calcivilrights.ca.gov. In the email, they should identify the names, addresses, and FEINs/SEINs of the labor contractor(s) in question and provide documentation of their efforts to obtain the relevant data.

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