

Service Pack: California Pay Data Reporting

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On March 18, 2021, we updated the system with California Pay Data Reporting functionality. Details are below.

New! California Pay Data Reporting

California law (Government Code Section 12999) requires private employers with 100 or more U.S. employees (and at least one employee in California) to annually submit data on the pay, hours worked, and demographics of their employees to the California Department of Fair Employment and Housing (DFEH). By March 31, employers must submit their reports covering the prior calendar year.

To assist our California customers in this process, we have created a new reporting page and form that can pull in your employee data which you can then use to create a download file. This file allows you to fine-tune your reporting numbers/codes and then electronically submit to the reporting agency via their website.

To use this reporting capability, you must have both the HR and Payroll sub-systems enabled and in use.

Important: California Pay Data Reporting Information

Formats for Downloaded Electronic File: California provides two file options that can be uploaded to their website: Excel and CSV. We have provided an Excel download for this. The CSV download will be coming in future release.

Website: This is the California Pay Data Reporting Website for your reference that includes User Guide, FAQ's, reporting portal, and more: <https://www.dfeh.ca.gov/paydatareporting/>

Gender: California officially recognizes three genders: female, male, and non-binary. Therefore, employers should report employees' sex according to these three categories. Non-binary will be available in a future release. Modifications can be made in the electronic file to account for employees claiming non-binary identity and currently categorized as male or female on their employee record. (This is also specified on the fillable form in the system.)

Section I – Employer Information: Can be found and completed directly in the Excel electronic file once it has been created and downloaded. This helps eliminate any issues for multi-establishment reporting when multiple reports need to be combined into a singular file and Employer information in Section I needs to be the same for all combined establishments reports on the singular file.

Wages: Will look at Box 5 on the W-2 (vs. EEO-1 that looks at Box 1). Per User Guide: 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. If Box 5 on W-2 is null, it will pull wages from Box 1. Any manual edits for W-2c can be made on the downloaded file.

Hours: The hours that pull into the Downloaded file are pulling from the hours on pay statements (excluding Memo type earnings codes).

Use of Commas: Per the California DFEH instructions, 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.). When a comma is entered into any field in Section II.A – Establishment Information, user will receive an "Invalid [Name of Field]. Could not save. Some information entered was not correct. Please fix all errors and try again." User should remove the prohibited comma character

and re-save.

California Pay Data Reporting - Report Page

This is the initial page where you will see all created forms and select **Add New** to add a new California Pay Data Report. This is accessed under **My Team > HR > Forms > Government Forms > California Pay Data**. After selecting **Add New**, you will be brought to the landing page where you can fill out the form, process data, and download a supporting file.

The screenshot shows a web application interface for California Pay Data Reporting. At the top, there is a navigation bar with a close button (X), a user profile (Sara Johnson), the time (12:15 PM (EDT)), the department (HR), and utility links for Feedback, Jira Integration, and a notification bell. Below the navigation bar, the page title is "California Pay Data" with a back arrow. On the right side, there are two buttons: "ADD NEW" and "ELECTRONIC FILE". Below the title, there is a pagination control showing "Page 1 of 1" and "1 - 5 of 5 Rows". A "Saved: [System]" dropdown is also visible. The main content is a table with the following columns: Establishment Name, Establishment Address Line 1, Establishment City, Establishment State, EIN, and Created. The table contains five rows of data, with the first row highlighted in blue. Each row has a checkbox, an edit icon, and a delete icon. The first row is selected, and its data is: Dors Company LLC, 10 Shirley Road Bypass, Derry, NH, Sara's Test Company Display Name, and 24/02/2021 12:44p.

	Establishment Name	Establishment Address Line 1	Establishment City	Establishment State	EIN	Created
<input checked="" type="checkbox"/>	Dors Company LLC	10 Shirley Road Bypass	Derry	NH	Sara's Test Company Display Name	24/02/2021 12:44p
<input type="checkbox"/>	Dors Siding & Windows	1 Main Street	Salem	NH	Sara's Test Company Display Name	02/03/2021 09:36a
<input type="checkbox"/>	Sunrise Markets	1 Main Street	Chelmsford	MA	Sara's Test Company Display Name	09/03/2021 04:17p
<input type="checkbox"/>	Victory Supermarket	1 Main Street	Chelmsford	MA	Sara's Test Company Display Name	09/03/2021 04:41p
<input type="checkbox"/>	Mike's Gas Station	1 Main Street	Chelmsford	MA	Sara's Test Company Display Name	09/03/2021 04:44p

California Pay Data Reporting - Fillable Form

Once you are on the report landing page and have selected **Add New**, you will see the fillable form. You will complete this form with your establishment information. Tool tips are available to guide you through some of the fields. At the top of the page is an Info note explaining how to handle non-binary identifying individuals. The form is divided into two sections: **Section I - Employer Information** and **Section II.A - Establishment Information** (enter your information). **Section II.B** on the downloaded form will populate based on the data entered after selecting **Process Data** and filling out the **California Pay Data Form Settings**.

12:18 PM (EDT)

Feedback Jira Integration

California Pay Data

DOWNLOAD FILE PROCESS DATA SAVE

Section I - Employer Information

Employer Information fields can be found and completed directly in the electronic file once created and downloaded. Modifications can be made in the electronic file as well as for the Race/Ethnicity/Sex column to make adjustments for employees claiming non-binary identity and currently categorized as male or female on their employee record.

Section II.A - Establishment Information

Establishment Name (Column A)*

Establishment Id (Column B)*

Establishment Address Line 1 (Column C)*

Establishment Address Line 2 (Column D)*

Establishment City (Column E)*

Establishment State (Column F)*

Establishment Zip Code (Column G)*

Establishment NAICS Code (Column H)*

Establishment Major Activity (Column I)*

Total Number of Employees at Establishment (Column J)*

Was a CA Pay Data Report filed for this establishment last Year? (Column K)*

Was an EEO-1 Report filed for this establishment last Year? (Column L)*

Is this establishment the employers headquarters? (Column M)*

Section II.B - Employee Detail

Job Category	Race/Ethnicity/Sex	Pay Band	Number of Employees	Total Hours
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The **Process Data** button, when selected, will open a pop-up of settings. This is the same pop-up that will appear as when you select Populate File in the EEO-1 report and the process is the same. Here, you will select the data and use the filters to select which employees should be included in the file. This will also populate Section II.B-Employee Detail in the form.

You can set a date range that will take a snapshot of your workforce for inclusion in the form. A tool tip recommends that you select dates from October 1 through December 31 of the previous year. If you are a multi-EIN company, you can select the proper EIN for the form, and below that setting check if you want to include synchronized employees (those employees being synched between EINs).

If you want to narrow the reporting to include specific cost centers, employee types, or account statuses, those may be set here as well. The system uses the employee's current cost center assignments. Manual adjustments to the downloaded file can be made if employees should be moved to a different cost center establishment. Terminated employees can be included in the snapshot period by checking the **Terminated** checkbox in the **Account Status** section in the **California Pay Data Form Settings** pop-up. It will not include terminated employees prior to the snapshot period.

← California Pay Data DOWNLOAD FILE PROCESS DATA SAVE

Section I - Employer Information

① Employer Information fields can be found and completed directly in the electronic file as well as for the Race/Ethnicity/Sex column and currently categorized as male or female on their employee record.

Section II.A - Establishment Information

Establishment Name (Column 1)
 Establishment Id (Column 2)
 Establishment Address Line 1 (Column 3)
 Establishment Address Line 2 (Column 4)
 Establishment City (Column 5)
 Establishment State (Column 6)
 Establishment Zip Code (Column 7)
 Establishment NAICS Code (Column 8)
 Establishment Major Activity (Column 9)
 Total Number of Employees at Establishment (Column 10)
 Was a CA Pay Data Report filed for this establishment last Year? (Column 11)
 Was an EEO-1 Report filed for this establishment last Year? (Column 12)
 Is this establishment the employers headquarters? (Column 13)

California Pay Data Form Settings

Workforce Snapshot From 01/10/2020 To 31/12/2020

EIN Brady Enterprises Display Name

Include Synchronised Employees

COST CENTRES

Location	<input type="text"/>	<input type="button" value="🔍"/>	<input type="button" value="✕"/>
Function	<input type="text"/>	<input type="button" value="🔍"/>	<input type="button" value="✕"/>
Market	<input type="text"/>	<input type="button" value="🔍"/>	<input type="button" value="✕"/>
Certified	<input type="text"/>	<input type="button" value="🔍"/>	<input type="button" value="✕"/>
Area	<input type="text"/>	<input type="button" value="🔍"/>	<input type="button" value="✕"/>
District	<input type="text"/>	<input type="button" value="🔍"/>	<input type="button" value="✕"/>
Department	<input type="text"/>	<input type="button" value="🔍"/>	<input type="button" value="✕"/>
Customer	<input type="text"/>	<input type="button" value="🔍"/>	<input type="button" value="✕"/>
Industry	<input type="text"/>	<input type="button" value="🔍"/>	<input type="button" value="✕"/>

ACCOUNT STATUS

Leave of Absence

Terminated

Active

Do Not Use-Test Only

EMPLOYEE TYPE

Consultant

Exempt

Non-Exempt

Section II.B - Employee Detail

Job Category	Race/Ethnicity/Sex	Pay Band	NUMBER OF EMPLOYEES	TOTAL HOURS
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After saving the settings in the pop-up, a **View Details** link displays in the fillable form to see which employees are or are not included in the file and why. Select the link to view a pop-up of the employees. The pop-up has a **Download** button, and when selected, will download a PDF of the employees shown.

← California Pay Data DOWNLOAD FILE PROCESS DATA SAVE

[View Details](#)

California Pay Data Population Details



DOWNLOAD

Number of Employees: 4

EMPLOYEE NAME	INCLUDED IN SECTION D ? NUMBER OF EMPLOYEES	INCLUDED IN SECTION D ? TOTAL NUMBER OF HOURS	REASON
	All <input type="button" value="v"/>	All <input type="button" value="v"/>	
Armond Beliveau	No	No	This Employee is synced in multiple EINs.
Abigail Albert	No	No	This Employee is synced in multiple EINs.
Jeremy Jefferson	Yes	Yes	
Robin Galloway	Yes	Yes	

Once the form is filled out and saved and ready, you can use the **Download File** button to create the file used to electronically file on the State of California's website. This will download the Excel file where you can complete **Section II.A - Employer Information** and make any manual edits as needed to **Section IIA -Establishment Information** or **Section IIA - Employee Detail** (for non-binary gender, etc.).

California Pay Data Reporting - Merging for Multi-Establishment to Excel Download

For companies with multi-establishments, you will create multiple forms, process the data for each and then go back to the report page (**Team > HR > Forms > California Pay Data**) and select all the establishment forms and then download the files. This will merge the data from all your establishments into one downloadable form.

California Pay Data Reporting - Excel Download File

The Excel download file contains the **PayDataReport** tab, which contains data populated from the fillable form. Additional tabs for instructions and examples are also available.

Section II: Employer Information	
Employer Information	Employer Data Entry (see instructions)
1 Reporting Year*	2020
2 Snapshot Period Begin Date*	10/01/2020
3 Snapshot Period End Date*	09/30/2020
4 Employer Name*	John Doe's Sals Mine
5 EEO Address Line 1*	1111 Moon Dr
6 EEO Address Line 2	Suite 200
7 EEO City*	Folsom
8 EEO State*	CA
9 EEO Country*	US
10 EEO ZIP Code*	95630
11 ICS Address Line 1	
12 ICS Address Line 2	
13 ICS City	
14 ICS State	
15 ICS Country	
16 ICS ZIP Code	
17 Employer CA SSN*	12345678
18 Employer EIN*	123456789
19 Employer DUNS Number	123456789
20 Is employer a contractor of the State of California**	Yes
21 Employer's Total U.S. Employees*	100
22 Employer's Total CA Employees*	100
23 Employer's Total U.S. Establishments*	1
24 Employer's Total CA Establishments*	1