



# HOW TO RUN YOUR CA PAY DATA REPORT IN CONNECT

To help you comply with the DFEH's new requirement for California employers with 100+ employees, this document will walk you through how to:

- 1 Prepare your employee data
- 2 Run your detail report to double-check your data
- 3 Run your CA Pay Data Report to submit to DFEH
- 4 Finalize your report and submit



### Check it off your To-Do List

Find additional information below:

- [California Pay Data Reporting User Guide](#)
- [Pay Data Reporting FAQ](#)
- [Pay Reporting Portal](#)

simple.  
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## 1 Prepare Your Employee Data

Before we dive into running reports, the first step is to make sure you've entered all your employee data. This includes each employee's gender, ethnicity, EEO class, and CPD Est Hours Per Week (if salaried). You can find these fields in Connect in your **employee profiles**.

### GENDER & ETHNICITY

**Employee Management > Select Employee > Personal Information**

The screenshot shows the 'Personal Information' form in the system. The 'Demographic Information' section contains fields for Salutation, First Name, Last Name, Middle Name, Nickname, Prior Name, Birth Date, Age, Gender, Marital Status, Ethnicity, SSN, and Photo. The 'Gender' and 'Ethnicity' fields are highlighted with red boxes.

### EEO CLASSIFICATION & CPD ESTIMATED HOURS

**Employee Management > Select Employee > Employment Information**

The screenshot shows the 'Employment Information' form. The 'Organization Information' section includes fields for Emp Status, Hire Date, Service Date, LOS, Term Date, Term Reason, Rehire Date, Adj Seniority Date, Title, Emp Type, Eligible For Rehire, Position Code, Supervisor Name, Is Supervisor, Tax Form, Retirement Plan, Pay Group, Work State, Mail Stop, Job Code, WCC, EEO Class, and FLSA Exempt. The 'EEO Class' field is highlighted with a red box. The 'Additional Information' section includes Clock Id, Branch, Department, 401(K) Status, 401(K) Eligibility Date, CPD Est Hours Per Week, Seasonal, and Domestic. The 'CPD Est Hours Per Week' field is highlighted with a red box. The 'Employment Eligibility' section includes I-9 Verified, I-9 Reverify, Citizenship, Visa Type, and Visa Expiration.

**Note:** You will only need to enter estimated hours worked per week (i.e. 40) as a whole number for salaried employees in the **CPD Est Hours Per Week** field. Do not enter any data in this field for hourly employees. Please note that SDP is not able to mass upload employee data for this field.

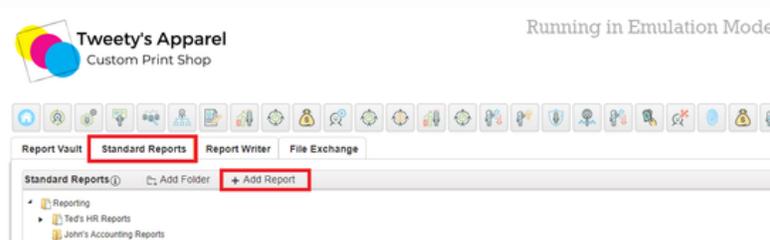
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## 2 Your Detail Report

After ensuring these fields are updated for all employees, it's time to run your Detail Report. This will provide you with a break-down of your pay data information by employee so you can do a final check for accuracy and identify any employees who may have incorrect or missing data.

To start, launch the **Reporting** module from your Connect Admin Portal.

Then, click on the **Standard Reports** tab at the top of the page. If you do not already have the California Pay Data Detail report listed, then click **+Add Report** to add it.



In the dialogue box that appears, begin typing **“SDP California Pay Data Detail”** until the report name populates in the dropdown. Click on the report from the dropdown menu, then click **Ok**.



After this, you will receive a confirmation message that the report was added successfully. Click **OK** to continue.



Once the report has been added to your list of standard reports, select it from your list. (If you just added the report, it will be at the bottom of your list!) Once you click on the report name, scroll up to the top of the page to configure your report.

First, you will select **Override Dates**, and enter the beginning and end dates of your Snapshot **Period**.

**Top Tip:** Per the DFEH, the Snapshot Period is a single pay period between October 1, 2020, and December 31, 2020. This should be a typical payroll (i.e. not a pay period where you were closed and working with a skeleton crew). According to the DFEH:

- 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.
- You can learn more about the DFEH reporting requirements in the California Pay Data Reporting User Guide [here](#).

The screenshot displays the 'Standard Reports' interface in Payentry. The 'Standard Reports' tab is active, and the 'SDP California Pay Data Detail' report is selected. The 'Date Range' section is expanded, showing the 'Override Dates' radio button selected. The 'Beginning' date is set to 05/20/2021 and the 'Ending' date is also set to 05/20/2021. The 'Data Selection' section shows 'Range 1' and 'Range 2' both set to 'No Filter'. The 'Output' section shows 'Output Format' set to 'CSV'. The 'Print Options' and 'Additional Options' sections are collapsed. A checkbox for 'Update Saved Criteria with Above Settings' is checked, and a 'Run Report' button is located at the bottom right.

After this, select **PDF** as your **Output Format**. (No changes need to be made in the **Data Selection** or **b** sections.) Then, select **Landscape** orientation under **Print Options**.

The screenshot shows the 'Standard Reports' configuration window for 'SDP California Pay Data Detail'. The 'Output' section has 'PDF' selected in the 'Output Format' dropdown. The 'Print Options' section has 'Landscape' selected in the 'Orientation' radio buttons. The 'Additional Options' section is expanded, showing a table with a 'Company Major Activity' row where the 'Value' is 'FALSE'.

Next, we'll move on to the **Additional Options** configuration. For the most part, you will be able to leave this section with the default settings. However, if you do have specific configuration needs, this is where you can accommodate those.

## MAJOR ACTIVITY

You will need to replace the text "FALSE" with a description of the major activity or activities of your business. The description can be up to 500 characters in length. For example, on the DFEH sample template, they include the description "Salt and mineral mining" for their sample company "John Doe's Salt Mine".

In the case of this example, John Doe's Salt Mine would simply replace the "FALSE" text in the Value column with "Salt and mineral mining".

Print Options		
Orientation: <input type="radio"/> Portrait <input checked="" type="radio"/> Landscape		
Additional Options		
Name	Description	Value
Company Major Activity	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.	FALSE

**Top Tip:** DFEH advises against using any commas in your description as the final report you upload will be in CSV format (commas are used to separate columns in a CSV file).

## ETHNICITY CODES & JOB CODES

Next are Ethnicity Codes and Job Codes. We have defaulted our report to look for the code values specified by DFEH (see below).

White	White Ethnic Code	W
Black	Black Ethnic Code	B
Hispanic	Hispanic Ethnic Code	H
Asian	Asian Ethnic Code	A
American Indian	American Indian Ethnic Code	I
Hawaiian or Pacific Islander	Hawaiian or Pacific Islander	P
Two or More Races	Two or More Races Code	T
Executive/Senior Level Officials and Managers	Executive/Senior level Officials and Managers Job Code	1
First/Mid - Level Officials and Managers	First/Mid - Level Officials and Managers Job Code	2
Professionals	Professionals Job Code	3
Technicians	Technicians Job Code	4
Sales Workers	Sales Workers Job Code	5
Administrative Support Workers	Administrative Support Job Code	6
Craft Workers	Craft Workers Job Code	7
Operatives	Operatives Job Code	8
Laborers	Laborers Job Code	9
Service Workers	Service Workers Job Code	10

However, if your organization is using different codes (i.e. if you use “WH” for White instead of “W” or “1.1” instead of “1” for Executive/Senior-level officials), you will need to edit these here to **ensure they match the codes in your employee profiles**. For example:

White	White Ethnic Code	WH
Black	Black Ethnic Code	BL
Hispanic	Hispanic Ethnic Code	H
Asian	Asian Ethnic Code	A
American Indian	American Indian Ethnic Code	AI
Hawaiian or Pacific Islander	Hawaiian or Pacific Islander	PI
Two or More Races	Two or More Races Code	T
Executive/Senior Level Officials and Managers	Executive/Senior level Officials and Managers Job Code	1.1
First/Mid - Level Officials and Managers	First/Mid - Level Officials and Managers Job Code	1.2
Professionals	Professionals Job Code	2
Technicians	Technicians Job Code	3
Sales Workers	Sales Workers Job Code	4
Administrative Support Workers	Administrative Support Job Code	5
Craft Workers	Craft Workers Job Code	6
Operatives	Operatives Job Code	7
Laborers	Laborers Job Code	8
Service Workers	Service Workers Job Code	9

**Top Tip:** Remember, for your report to run smoothly, the values in this section **must** correspond to the codes used in your **Ethnicity** and **EEO Class** fields in your employee profiles.

## CHILD COMPANIES

If you have multiple COIDs with SDP, then you can check the box to **Include Child Companies** if you would like to group your COIDs together in a single report.

Otherwise, you can leave this unchecked and run each COID's report separately.

**Note:** You must be an Admin under all parent/child companies in order to select this option.

Include Child Companies	Include Child Companies With Parent	<input type="checkbox"/>
Name of Custom field for Hours Per Week	Custom Connect Field for estimating hours per week for exempt employees	<input type="text" value="CPD Est Hours Per Week"/>
Code Group with PTO Items	Code group with PTO Earnings codes	<input type="text" value="CalPayPTO"/>
Did you file a Cal PayData Report Last Year?	Check to say you filed a report last year	<input type="checkbox"/>
Did you file an EEO-1 report last year?	Check if you filed an EEO-1 report last year	<input type="checkbox"/>
Replace Salary EE with Estimated hrs	Replace Salaried employees with estimated hours (yes if salaried employees have no hours in the system)	<input checked="" type="checkbox"/>
Replace EEO Class Code with Custom Connect Field	Enter the name of the custom connect field	<input type="text"/>

Update Saved Criteria with Above Settings

## CUSTOM FIELD, CODE GROUP, & SALARY EE ESTIMATED HOURS

The following sections are defaults based on our report configuration. Be sure that each of the sections below include the bolded values to ensure your report runs smoothly:

- Name of Custom field for Hours Per Week – **CPD Est Hours Per Week**
- Code Group with PTO items – **CalPayPTO**
- Replace Salary EE with Estimated hrs. – **Checked**

Include Child Companies	Include Child Companies With Parent	<input type="checkbox"/>
Name of Custom field for Hours Per Week	Custom Connect Field for estimating hours per week for exempt employees	<input type="text" value="CPD Est Hours Per Week"/>
Code Group with PTO items	Code group with PTO Earnings codes	<input type="text" value="CalPayPTO"/>
Did you file a Cal PayData Report Last Year?	Check to say you filed a report last year	<input type="checkbox"/>
Did you file an EEO-1 report last year?	Check if you filed an EEO-1 report last year	<input type="checkbox"/>
Replace Salary EE with Estimated hrs	Replace Salaried employees with estimated hours (yes if salaried employees have no hours in the system)	<input checked="" type="checkbox"/>
Replace EEO Class Code with Custom Connect Field	Enter the name of the custom connect field	<input type="text"/>

Update Saved Criteria with Above Settings

## PAST FILING OF CALIFORNIA PAY DATA REPORTS AND EEO-1 REPORT

Finally, you can check off if you filed a CA Pay Data Report last year. (As this is the first year this program has been in effect, you should leave this unchecked for this reporting year.) Then, you can check off if you filed an EEO-1 report last year.

Include Child Companies	Include Child Companies With Parent	<input type="checkbox"/>
Name of Custom field for Hours Per Week	Custom Connect Field for estimating hours per week for exempt employees	CPD Est Hours Per Week
Code Group with PTO Items	Code group with PTO Earnings codes	CalPayPTO
Did you file a Cal PayData Report Last Year?	Check to say you filed a report last year	<input checked="" type="checkbox"/>
Did you file an EEO-1 report last year?	Check if you filed an EEO-1 report last year	<input checked="" type="checkbox"/>
Replace Salary EE with Estimated hrs	Replace Salaried employees with estimated hours (yes if salaried employees have no hours in the system)	<input checked="" type="checkbox"/>
Replace EEO Class Code with Custom Connect Field	Enter the name of the custom connect field	

Update Saved Criteria with Above Settings

Then, click **Run Report**. Your report should automatically download.

**Top Tip:** Keep all popup blockers turned off as this will prevent your report from downloading.

Include Child Companies	Include Child Companies With Parent	<input type="checkbox"/>
Name of Custom field for Hours Per Week	Custom Connect Field for estimating hours per week for exempt employees	CPD Est Hours Per Week
Code Group with PTO Items	Code group with PTO Earnings codes	CalPayPTO
Did you file a Cal PayData Report Last Year?	Check to say you filed a report last year	<input type="checkbox"/>
Did you file an EEO-1 report last year?	Check if you filed an EEO-1 report last year	<input type="checkbox"/>
Replace Salary EE with Estimated hrs	Replace Salaried employees with estimated hours (yes if salaried employees have no hours in the system)	<input checked="" type="checkbox"/>
Replace EEO Class Code with Custom Connect Field	Enter the name of the custom connect field	

Update Saved Criteria with Above Settings

After your report has downloaded, open the PDF to review the data:

- Confirm all employees' **gender** and **ethnicity** codes are properly assigned
- If there are any **0** values in the **Hours** column, you will need to go add in the employee's **CPD Est Hours Per Week** on their Employee Profile
- If there are any **X** values in the employee's **gender**, **ethnicity**, or **EEO Class** columns, you will need to go add in this information to the employee's Employee Profile

Once you have validated that your Detail Report is complete and accurate, it's time to run your CA Pay Data Report to Submit to DFEH!

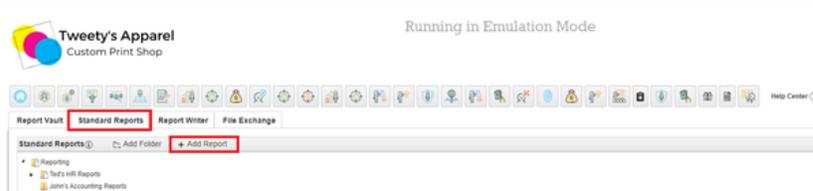
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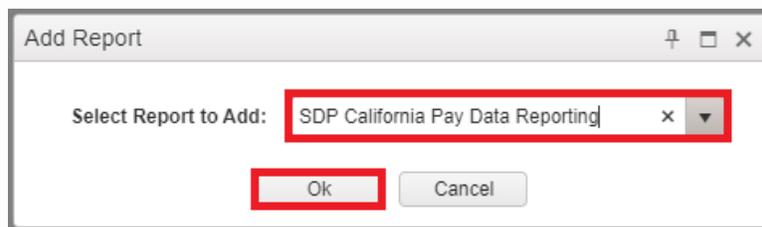
## 3 Run Your CA Pay Data Report to Submit to DFEH

Go back to the **Standard Reports** tab in your **Reporting** module. If you do not already have the **SDP California Pay Data Reporting** report listed, then click **+Add Report** to add it.

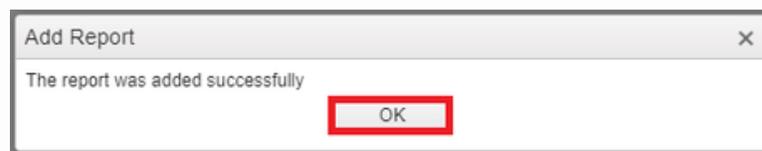
**Note:** This is a different report than the *SDP California Pay Data Detail* report we just ran.



In the dialogue box that appears, begin typing **“SDP California Pay Data Reporting”** until the report name populates in the dropdown. Click on the report from the dropdown menu, then click **OK**.



After this, you will receive a confirmation message that the report was added successfully. Click **OK** to continue.



Once the report has been added to your list of standard reports, select it from your list. (If you just added the report, it will be at the bottom of your list!) Once you click on the report name, scroll up to the top of the page to configure your report.

Repeat the report configuration following the same steps as used for the **SDP California Pay Data Detail Report** except for:

1. The report's Output Format should be TXT.

**Note:** In order for your report to run properly, you must select TXT as your output format in this section. However, our system will automatically convert the file to CSV as it processes so you will be able to upload it to the DFEH portal.

The screenshot shows the 'Standard Reports' configuration interface. The title is 'SDP California Pay Data Reporting'. Under the 'Output' section, the 'Output Format' is set to 'TXT'. Other sections include 'Date Range' (set to 'Override Dates' with a date range from 05/29/2021-00 to 05/29/2021-99), 'Data Selection' (Range 1 and 2 set to 'No Filter'), and 'Sorting and Grouping'. A 'Run Report' button is visible at the bottom.

2. The report's **Output folder for Cal Pay Data** under **Additional Options** should be left as is (\\sdp-file-a01\Payroll\Shugo\Clients\YOURCOMP ANYCODE). For example, if your COID and company name was **A123 Connie's Cupcakes**, then this section would say \\sdp-file-a01\Payroll\Shugo\Clients\A123.

This screenshot shows the 'Additional Options' section. The 'Output folder for Cal Pay Data' field contains the path '\\sdp-file-a01\Payroll\Shugo\Clients\A123' and is highlighted with a red box. Other options include 'Replace Salary EE with Estimated hrs' (checked) and 'Replace EEO Class Code with Custom Connect Field' (empty).

3. The Replace EEO Class Code with **Custom Connect Field**, field under Additional Options should be left blank unless a member of Payentry's IT department has reached out to you to enter data here.

This is another view of the 'Additional Options' section, identical to the previous one, with the 'Output folder for Cal Pay Data' field highlighted in red.

All other components of the report configuration should match your Detail report exactly.

**Top Tip:** It may help to have your Detail report configuration open in another tab so you can toggle back and forth to copy over your report details.

After you have updated all fields in the **Date Range, Print Options,** and Additional Options sections to match your Detail report, click **Run Report**.

Your finalized report will then be sent to your account's secure email contacts. Please allow for up to **30-60 minutes** to receive your report via secure email.

This final screenshot shows the 'Additional Options' section with the 'Run Report' button highlighted in red, indicating the final step in the configuration process.

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## 4 Finalize Your Report and Submit

After your report has downloaded, open the CSV to finalize the data. You will need to complete any missing information in **Section I: Employer Information**.

Then, scroll down to Section II.A – Establishment Information and Section II.B – Employee Detail to verify the report data is complete and accurate.

**Top Tip:** Again, remember not to include any commas as you complete your report information since commas are used to separate columns in a CSV file.

### UPLOAD TO DFEH PORTAL

Once you have finished finalizing your report, you will log into the DFEH's California Pay Data Reporting Portal [here](#).

**Note:** You can find more detailed instructions on uploading your report to the DFEH portal including pictures beginning on page 25 of the CA Pay Data Reporting Portal User Guide [here](#).

The Portal will assign a Submission ID to the report you are uploading. Be sure to securely record your Submission ID as it will be required when re-entering the Portal to view or edit a non-certified report, and DFEH cannot provide an employer with their Submission ID if lost or forgotten.

After recording your Submission ID, select **Continue** to move on to the next step.

Enter your **Employer Name** to begin the upload process, then select **Upload CSV File**. The portal will then issue a prompt to select and upload your CSV file.

After your uploaded file is processed, the **Data Record Status** will show either:

- **Validated** if the Portal confirmed that all records in the file uploaded without errors and report is ready for certification
- **Validation Errors** if the uploaded file contains errors that must be corrected before it can be certified

Whether the file uploaded with or without errors, you can withdraw the file from your Portal at any time before certification by clicking **Withdraw**.

## CORRECTING DATA ERRORS

If the Portal's validation process found any errors in your CSV file, you can correct the errors from within your Portal.

To begin, select Edit in the Action column next to your Validation Errors record status.

**Note:** *If you prefer, you can Withdraw your report, fix the errors in the source file, and upload a new file to the Portal instead of correcting the data errors within the Portal.*

The Portal will display a message indicating the total number of Section I and Section II data records that failed validation. All data records with errors will have a Data Record Status of Validation Errors which you can correct by selecting Edit to make the necessary changes.

After all data records with Validation Errors have been corrected, the file's Data Record Status will update to Validated.

## CERTIFYING YOUR REPORT

Once your report is Validated, you can begin the certification process by selecting Certify.

**Note:** *After a report is certified and submitted to DFEH, it will no longer be viewable in the Portal. However, on the final page in the certification process you will have the option to download your certified Pay Data Report.*

To certify and submit your report, enter the required information about the certifying official and add any optional clarifying remarks. After entering your data, select Certify.

A popup will display asking for confirmation to certify and submit your report. Select Yes to confirm your certification and submission.

The Portal will then display a thank you page indicating that your report was successfully certified and submitted to DFEH. To download a copy of the certified and submitted report, click the Final Report link.

DFEH recommends printing this page for your records. Then, select Exit to return to the Portal Welcome page. After exiting, the Submission ID will no longer be valid for reentering the Portal and your certified report will no longer be accessible in the Portal.