Regional Pay Survey Instructions

1. **Log In:**

   Your username and password are included on your invitation for participation. After accessing the survey platform you will be given the option of personalizing your password. Should you forget your username and/or password, reach out to your survey team for assistance. Warning: Resetting your login and password can take up to 24 hours.

2. **'Edit Company Info.' tab:**

   When you log into the survey you will be taken to the 'Edit Company Info' tab. This tab includes company information that must be submitted in order for your data to be included in the survey report. The survey is designed for maneuvering between data fields with your mouse. Hovering over a data field will activate a pop- up/tooltip to assist in answering questions. There are a few special fields which require your attention:

   Primary County (Area): If you are reporting data for multiple counties within the same area (see Area breakdowns below) complete one survey. However, if you are reporting data for counties in multiple Areas, please reach out to your survey team for additional survey logins.

   Union Status: When you indicate your company's union status here, your status will be pre-loaded and grayed out on the 'Match Jobs/Enter Data' tab.

   Note: If ANY of your organization is represented by a union, you will indicate union.

   Organization Type: When you indicate your organization's profit type on this tab, it will be pre- loaded and grayed out on the 'Match Jobs/Enter Data' tab.

   Work hrs/week: When you indicate your standard work week hours here, it is pre-loaded on the 'Match Jobs/Enter Data' tab.

   Note: The work week hours field is <u>not</u> grayed out on the 'Match Jobs/Enter Data' tab, enabling you to change the hours worked per week by job.

   Number of Employees: Report the number of employees that are under the influence of the business unit for which you are submitting data (regardless of the physical location of the employees).

   (?): When you see this symbol (question mark inside of a circle), it indicates there are additional directions available by clicking on the symbol.

   Save: When you have completed your Company information, click the Save button at the bottom of the page. When your save is successful (no red error messages on the form), you will be returned to the top of the page. Click on the 'Match Jobs/Enter Data' tab to continue.

3. **'Match Jobs/Enter Data' tab:**

   a) Selecting Job Matches

   Note the following:

   a) Survey Job Titles reflect the nature and level of jobs (e.g. clerk, operator, manager, analyst, etc.). Your organization's titles may be different.

   b) When you click on a job title a Job Description summary will appear in the box below it to aid in determining if you have a job that is a "reasonable" match.

   c) Each summary description identifies the "core" duties and "typical minimum" qualifications of the survey job. Examples of other duties, that may or may not apply to your job, may also be included.

   d) Job Description summaries are general in nature and reflect the typical range of duties and responsibilities. They may not cover every task and may not match your job(s) completely.

   e) If you believe the "core" duties of your position include at least 70% of the "core" duties described in the survey job consider it a reasonable match.

   f) Do not expect to have matches for a large number of survey jobs or to include all of your employees in your input. Cascade selects survey jobs based on their likelihood of existence in a number of organizations (i.e. benchmark positions).

   g) In instances where an employee performs elements of more than one of the survey jobs, only report that employee according to his/her "primary" job duties.

   Example: An employee's primary job is that of an Accountant, but occasionally performs Buyer duties. This employee should be reported only as an Accountant. Do not report as a Buyer.

   h) **Job Levels (V, IV, III, II, I)** - Some survey job titles include "job level designations" where V = "Highest Level," IV = "Next Highest Level", III = "Intermediate Level," II = "Next Lower Level", and I = "Lowest Level." Differences, which are covered in the Job Description summaries, typically include variations in job complexity, employee qualifications and experience, degree of job repetition, scope of job, size of organization, and/or supervision received.

   i) **Job Matching** - There are three basic process options for job matching: For additional details on these processes refer to 'Job Matching Options' on the Help/Download tab.

      a) Online complete one-by-one processing

      b) Online 'Match Only' – fill in pay data later option

      c) Print the job descriptions match them to jobs and enter your pay data using the on-line process.

b) **Entering Pay Data** - There are five areas of focus:

a) *Job Fields:*

   i. **Incumbents:** Enter the number of employees/incumbents performing the specified job at your organization.

   ii. **Job Status:** Select "Exempt" if this job is classified as an exempt job in your organization, select "Non-Exempt" if the job is classified as a non-exempt job (eligible for overtime pay).

   iii. **Union Status:** If this job is a Union job, select Union. If it is a Non-Union job, select Non- Union. If you have no union jobs and indicated this in the Company Information section this box will be defaulted as such and grayed out.

   iv. **Match Degree:** Indicate how well your job matches the survey job. Select "match" if the general scope of your job fits, select "minus" if a few elements do not apply to your job, or select "plus" if your job is somewhat broader.

   v. **Title (Co):** If you have a job that matches the survey job, enter your organization's job title in the space provided.

b) *Salary Fields:*

   i. **Avg.:** Enter the current **"Average" base pay for all employees in the job.** The Average pay equals the total of all rates paid divided by the number of employees. (**Example:** If one employee earns $10 per hr. and a second $12, the average rate is $11 per hour. $10 + $12 =$22/2.

   ii. **Pay Per:** Select whether you are reporting hourly, monthly or annual pay data for the job. Input hourly data if you are including part-time employees.

   iii. **Start:** Enter the base rate typically paid for a **new hire** meeting ONLY the minimum job requirements.

   iv. **Low:** Enter the "lowest" rate typically paid to an employee. Leave blank if you have only one employee in the job. Exclude shift and lead premiums, and overtime pay.

   v. **High:** Enter the "highest" rate typically paid to an employee. Exclude shift and lead premiums, and overtime pay. Leave blank if you have only one employee in the job.

c) *Bonus Fields:*

   i. **# Receiving:** <u>If applicable</u>, **enter the number of employees** in the job who are eligible for performance bonuses (include commissions but exclude discretionary or holiday bonuses).

   ii. **Avg Yearly:** <u>If applicable</u>, **enter the average of the total bonuses paid** (to those who received awards) for the last 12 months. (***Example:*** If one employee received bonuses totaling $500 and a second received $300, the average annual bonus paid is $400.00. $500 + $300 =$800/2). ***Bonuses should be performance based bonuses/ incentives/ commissions - not "Holiday" or discretionary bonuses.***

d) Misc. Fields:

    i. **Hours/ week:** Enter the number of hours in your **organization's standard workweek** for the job (excluding overtime hours, typically 40 hours). If you elected to enter average weekly hours at the Company Information section this box will be filled in for you (but changeable if appropriate).

    ii. **Comments:** If you have any comments that may provide clarification, please utilize this box to do so.

e) Buttons

    i. **'Save':** After you have entered all your job data for a position, click this button to save the job as part of your company data.

    ii. **'Cancel':** If you have entered partial data and wish to clear it prior to saving the data, click on this button to clear the bottom section details (on this job only).

    iii. **'Delete This Match':** If you have entered a job and wish to remove it from your data, click on this button (removes all pay data for this job only). This button only appears when viewing previously matched jobs with or without pay data.

    iv. **'Match Only':** If you would like to pre-match your jobs before entering data, click here to save each matching job before entering pay data for each.

    v. **'Refresh':** If you would like to see your list ('My Job Matches') updated with all your matches, click here to refresh your list and then click on 'My Job Matches' to view the new list.

4. 'Help/Downloads' tab:

This tab gives tips for frequently asked questions covering the following topics:

    a) The "Edit/Enter Company Info." tab

    b) How to view "My Job Matches"

    c) How to view "All Survey Jobs"

    d) A List of "New Survey Jobs"

    e) How to "Match a New Job"

    f) Job Match Guidelines

    g) How to "Enter/Edit Job Pay Data"

    h) Job Matching Options

    i) Exporting & Downloading Data

5. 'Status' tab:

This tab is used to view your last job data update. It provides a count of the updated matches, how to review your job matches, and reminds you that each of your job matches must be updated a least once within before the next year's survey opens for participation to be considered a survey participant.

6. 'Logout' tab:

This tab is used to log out of the survey. Please note this is a live database and you are encouraged to update your data at any time during the year.

Thank you for your valued participation!