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Starting Your EEO-1 Survey

Screens 4 – 8
Step 1: Starting Your EEO-1 Survey

Logging in

To begin filing your survey, proceed to the EEO-1 login page here: https://egov.eeoc.gov/eeo1/login.jsp

*If your company is filing for the first time, refer to Screens 99 – 108.
Step 2: Starting Your EEO-1 Survey

Login page

The login page requires you to enter your login ID/company number and your temporary password and press "Login" to start your EEO-1 survey. Your login ID/company number and temporary password are included in your 2018 EEO-1 notification letter. Your 2017 password will NOT carry over into 2018 EEO-1 survey.

Note: If you have not received your 2018 notification letter please refer to Screens 109-116 for an alternate login procedure with directions on how to obtain your company number/login ID and password to login.
Step 3: Starting Your EEO-1 Survey

Logging in

When logging in for the first time, you will be directed to create a permanent password for the survey year. Enter your company number/login ID, and create your new password. Reenter your new password in the “Confirm New Password” field, then click “Submit Password” to finish creating your password.
Upon proceeding you will be presented with the Standards and Rules of Behavior for the 2018 EEO-1 Survey. After reading it, check the box and press next to accept the conditions and comply with the rules and proceed further with the survey.
Now that you have logged in, you will provide some preliminary information. This information will update any major changes to your company since the previous EEO-1 survey.
Provide the name and title for the company official who is certifying your survey.

A certifying official refers to any employee in your company tasked with certifying that your submitted survey information is accurate.
User identification

Provide the name, title and contact information for your company’s contact person.

The contact person is the individual whose e-mail is linked with the EEO-1 survey and is your company’s contact for the EEOC Employer Data Team.
Company identification

Enter your company’s Employer Identification Number (EIN) and Dun and Bradstreet number (if applicable). When updating the address, suggested addresses will be provided. Continue to complete until the correct address appears. Click on this address to continue. If the correct address does not appear, or if you are entering a P.O. Box, click on “Manual Address Entry” and enter the address in the provided cells.
Survey eligibility

Q1: Select “Yes” if the entire company has at least 100 employees in the pay period for which you are reporting. Select “No” if not.

Q2: Select “Yes” if your company is affiliated with another company through common ownership/centralized management, bringing total employment to at least 100 employees. Select “No” if not.

Q3: Select “Yes” if the company or any of its establishments (a) have 50 or more employees AND (b) is not exempt as provided by 41 CFR 60-1.5, AND either (1) is a prime government contractor or first-tier subcontractor, and has a contract, subcontract, or purchase order amounting to $50,000 or more, or (2) serves as a depository of Government funds in any amount or is a financial institution which is an issuing and paying agent for U.S. Savings Bonds and Savings Notes. Select “No” if not.
If you selected “Yes” to any one of the above questions, you will be eligible to complete the survey. Continue to **Screen 16**. However, if you are a single-establishment company, go to **Screen 67**.

If you selected “No” to all three questions, give reasons by selecting from the drop down menu and proceed to **Screen 15**.
If you answered “No” to all of the survey eligibility questions, you will not be required to complete the reporting year’s survey. Verify that all the information listed on this screen is correct. Check the box if you think your company will not meet the requirements to file the EEO-1 report next year. Finally, check the box under “Certification” to confirm that everything is accurate. Click the “Certify” button to complete your report for the year.
On this screen you will provide the answer regarding the status of your establishments.

If any establishments have closed or are no longer in operation since the previous survey, you will select “Yes” and proceed to **Screen 17**.

If no establishments have closed since the previous survey you will select “No” and proceed to **Screen 19**.
Updating closed establishments

You will be presented with a list of establishments from the previous year’s survey. Please select all establishments that should be removed and not included in the current year’s survey.
If your company has closed establishments since the previous filing year, select the option that best explains why it has closed.
Step 5: Preliminary Information

Selecting a filing method

Select one of the following methods for completing your EEO-1 Survey.

“Complete Online Form” refers to filing via the online form. You will enter data manually into fillable cells. See Screens 53 – 98.

“Upload Data File” refers to filing via data file transfer. Filing with this method involves uploading a file prepared on your Human Resource Information System (HRIS) into the EEO-1 Survey system. See Screens 20 – 52.
Filing via the “Upload Data File Method”

Screens 20 – 52

If “Complete Online Form” was selected, use Screens 53 – 98 instead.
Step 1: Data Upload

Downloading your establishment listing

Before generating the upload file, you should first update the establishment numbers in your HRIS. You can download the current year’s establishment listing from your company’s EEO-1 online database.

If you have already updated your establishment numbers, proceed to Screen 27.
Step 2: Data Upload

Downloading your establishment listing

After logging in, click “Other Actions”.

- EEO-1 Survey Data Filing Options
- View Reports
- Not Required to File
- Extension
- Add Establishments
- Delete Establishments
- Contact Update
- Other Actions
Under “Present Year Reports”, click “All Establishments”.

Utilities
- Uncertify
  - Uncertify reports.

- Convert
  - Convert from a single-establishment employer to a multi-establishment employer.

Previous Year Reports
- New Establishment
  - Listing of all establishments filed for the first time in the previous year.

- All Establishments
  - Listing of all previous year establishments.

Present Year Reports
- All Establishments
  - Listing of all establishments in the present year.

- Check Totals
  - Present year employee totals for all establishments.
A list of your current establishments will appear. Establishment numbers are located to the left of each establishment row. You may refer to these establishment numbers when ensuring that the numbers in both the company EEO-1 database and your company’s HRIS match.
Navigating to the upload screen

On the main menu screen after you log in, click “EEO-1 Survey Data Filing Options”.

Screen 25

Step 1: Data Upload

EEO-1 Survey Data Filing Options
View Reports
Not Required to File
Extension
Add Establishments
Delete Establishments
Contact Update
Other Actions
Select “Upload Data File”, then click “Next”. Answer the questions that follow.
Step 3: Data Upload

Navigating to the upload screen

Data File Upload

EEO-1 data files must be tested before they can be uploaded to production. The following process tests the file and once validated, it allows you to upload the file directly to production. Post testing, you might see errors and/or warnings messages. You have to fix the errors before the data can be moved to production. Kindly note that uploading the file here is not the final submission.

Please answer the questions below to proceed.

1. Have you updated the establishment numbers in your Human Resource Information System (HRIS) PRIOR to creating and uploading the data file?

   - Yes
   - No

If you answered “No”, the system will not let you continue. You must update the establishment numbers in your HRIS before uploading. (See Screens 21 – 24 for help with this.)
If you answered “Yes”, the system will not let you continue. Mergers and acquisitions should be handled prior to uploading your file. Send an email to E1.ACQUISITIONSMERGERS@EEOC.GOV with the subject line “Acquisition/Merger” regarding the details of the acquisition(s) and/or merger(s).

(For more information regarding acquisitions and mergers, see Screens 118 – 121.)
If you answered “Yes”, once your file is uploaded, you can close these establishments manually or by emailing a .CSV file including the establishment numbers of all closed establishments to EEO1.Upload@eeoc.gov.
Navigating to the upload screen

Once you have answered all of the questions, click “Next” to continue.

Clicking “Cancel” will take you back to the data filing options screen.
Step 1: Data Upload

Uploading your file

Select which data file type you will be uploading (click the “Detail” or “Summary” link next to each file type for an example).
Step 1-A: Data Upload

Uploading your file

**DATA FILE 1**

Data File 1 is a fixed-length file and must be in an ASCII/TXT format.
Uploading your file

DATA FILE 1

For **single-establishment companies**, there will be only one data record in the data file indicated as Type/Status Code-1.

For **multi-establishment companies**, Data File-1 includes data records for Type/Status Codes 2,3,4,9 and 8 (Type/Status Codes 8 are used if the employer is not submitting Type 6 records for the establishments employing fewer than 50 employees). Type/Status Code 9 data records are for establishments reporting for the first time in the current year's EEO-1 survey. Type/Status Code 8 data records are for establishments employing fewer than 50; however, employment data categorized by race/ethnicity, gender and job category must be provided for each Type/Status Code 8 data record.
DATA FILE 2
Data File 2 is a fixed-length file and must be in an ASCII/TXT format.
Step 1-D: Data Upload

Uploading your file

**DATA FILE 2**
This file is used for establishments with less than 50 employees. Multi-establishment employers can use this to create Type 6 reports. The file is of fixed length and is usually extracted from the company's payroll system.

**NOTE:** Before uploading this file, the system will delete any Type 6 reports that were uploaded or entered for this year’s survey.
DATA FILE 3
Data File 3 contains the same information as "Data File 2", but is in a Comma-Separated Values (CSV) delimited format that can be created from almost any spreadsheet program. This may be the easiest and quickest way to enter "Type 6 Reports" for Establishments with less than 50 employees.

NOTE: Before uploading this file, the system will delete any Type 6 reports that were uploaded or entered for this year’s survey.
DATA FILE 4
Data File 4 contains the same information as "Data File 1", but is in a Comma-Separate Values (CSV) delimited format that can be created from almost any spreadsheet program.
Click “Choose File” and select the file you want to upload.
Step 2-A: Data Upload

Uploading your file

**NOTE:** EEOC only accepts .txt and .csv file formats for data uploads.

If you are unsure about how to format your data file for upload, or if you want more information about EEO-1 data files, navigate to [www.eeoc.gov/eeo1survey](http://www.eeoc.gov/eeo1survey) and locate the links under the heading “Data File” in the callout box titled “Alternate EEO-1 Reporting Formats” on the left hand side of the page.
Step 2-B: Data Upload

Uploading your file

Navigate to the folder on your computer where your company’s data file is located, and select the file.

The name of the document you chose for uploading will appear next to the “Choose File” button so you can ensure you have selected the correct document. If the file is correct, click “Continue” to move to the next step.
There are four possible results to the test.

1. There are errors and warnings in your file.
2. There are errors in your file.
3. There are warnings in your file.
4. There are no errors or warnings in your file.

These results will be accompanied by a list of errors and or warnings in the data file you chose for testing. You must correct the *errors* in the file before uploading. The *warnings* can be corrected either in the file or later in the electronic system. All records without warnings or errors are marked as “OK”.

**Errors and warnings**
Errors and warnings

Go through the list of errors/warnings and correct them in the original file for upload.

Example of an error in the uploaded test file.

Need help with errors? Read the “EEO-1 Data Upload Error Fact Sheet” located on https://www.eeoc.gov/employers/eeo1survey/data-upload-upload-error.cfm
At the bottom of the warning/error report, you can see the total count of establishment reports that are OK, that have WARNINGS, and that have ERRORS.

You can print this warning/error report for your reference by clicking the “Print This Page” button.
Before uploading the file for re-test, the records with errors must be corrected or removed from the file.

Click the “Back to Test File” button to re-test the data file once you have corrected the errors in your file.

**NOTE:** If you remove the records with errors from your file they must be entered manually using the online form’s filing method. (See Screen 53.)
Once you have fixed all of the ERRORS in your file and uploaded it for testing again, you might still have some WARNINGS. **This will not impede your ability to upload the file. However, you will still have to fix these warnings in the online form before certifying your report.**
Once all of the ERRORS have been fixed in your file, scroll to the bottom of the ERRORS/WARNINGS screen and click “Continue to Next Step” to load the data from your file into the EEO-1 online system.
On this page you will be able to see information about the establishments that were included in your data file.

**NOTE:** Once you click “Continue to Next Step”, you will *not* be able to upload data for the establishments listed on this page again. But, you *will* be able to edit the data manually using the online form, and you still have to CERTIFY the report.
Once you have reviewed the information on this page, read the disclaimer message, check the “Yes, please continue” box and click “Continue to Next Step”. **THIS WILL ONLY UPLOAD YOUR DATA TO THE EEO-1 ONLINE SYSTEM. You still have to CERTIFY your report!**
You will now see your data in the online filing system’s “Edit EEO-1” screen. You can add, delete, or modify any information present on this screen manually. Every establishment marked with an asterisk must be completed. This can be done by selecting edit and completing the information or deleting it if it no longer exists.
Once all establishments are marked as complete, a message will appear on the top of the screen, asking you to certify. Click “Certify Reports” to proceed with certification.
The certification screen will present you with a summary of your survey and a statement of certification. Check the box stating that the information you provided is accurate, then click “Certify” to finalize your EEO-1 Survey.

You MUST click the “Certify” button to submit your report, or it will be considered incomplete and therefore unacceptable for submission.
When you see the following screen, you will know your report has been completed and certified. Your obligations for the EEO-1 Survey have been met.
Filing via the “Complete Online Form Method”

Screens 53 – 98

If “Upload Data File” was selected, use Screens 20 – 52 instead.
Step 1: Complete Online Form

Establishment list screen

If “Complete Online Form” is selected, you will be taken to a screen with a list of your establishments.

NOTE: If this is your company’s first time filing the EEO-1 survey, and your company is a multi-establishment company you will only see a Type 2 and 3 report. You must add your other establishments as needed. The Type 2 and 3 report will show the same establishment number, name, and address, but both reports are different. See Screens 57 – 65 for report type info.
If your company is a single-establishment (i.e., only has one establishment/location), you will see only one report listed as a Type 1 report. You are only required to fill out this one report.

You will not see a listing of establishments; instead, the system will guide you through filing for your sole establishment.
If your company is a multi-establishment (i.e., has more than one establishment/location), you must fill out a report for each of your establishments. To add a new establishment, refer to Screens 79 – 84.
List of report types

**Type 1** – Single-establishment report; used only for companies that have one establishment/location.
Step 1-A: Complete Online Form

List of report types

Type 2 – Consolidated report; contains the total employee demographics for all of your establishments combined.
Type 3 – Headquarters report; contains the employee demographics for only your headquarters establishment.
Type 4 – For an establishment with more than 50 employees; contains employee demographics.
Type 6 – For an establishment with less than 50 employees; contains only the establishment name, address and total number of employees for the establishment.

(See Screen 64 for additional information regarding Type 6 reports).
Type 7 – Reconciliation report. This report will inform you if there are any data entry errors in your survey. This report is only applicable to you if you have any Type 6 reports.

See Screens 94 – 96 for additional information regarding the reconciliation report.
Type 8 – For an establishment with less than 50 employees; contains employee demographics.

(See Screen 64 for additional information regarding Type 8 reports).
If you choose to use Type 6 reports, the numbers for your Type 3, 4, and 6 reports will not auto-populate the data entered into your Type 2 report. You will need to go into your Type 2 report and manually input all the data from each of your reports.

If you choose to use Type 8 reports, the numbers from all of your establishments will auto-populate the data-entered into your Type 2 report (and the system will prevent you from entering the numbers yourself). You can only use Type 6 or Type 8 reports, not both.
To switch from a Type 6 report to a Type 8 report (or vice versa), send a request by email with your company ID number and contact information to e1.techassistance@eeoc.gov.
Step 1: Complete Online Form

Entering your data

To begin filling out information for a report, under the “Action” heading select “Edit”, and then click “Go” for the establishment you would like to work on.

Clicking “Go” here will take you to this specific establishment’s report.
Verify that the information in all fields are correct and click “Save and Continue”. If the address is incorrect, click the address box to edit it (See Screen 12 for more information on how to edit address).
Step 3: Complete Online Form

Entering your data

Enter your NAICS code in the box. Then click “Save and Continue”. If you do not know your NAICS code, see the following screen for guidance.

The North American Industry Classification System (NAICS) is the standard used by federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy.
You can search for your NAICS code by typing key words or numbers, and then selecting the option from the drop-down menu that best describes your establishment’s industry.
Enter the correct number of employees for each relevant row and column. Totals will add up on their own.
If a category has no employees, you may leave the box blank or put a “0”.

Both instances here are correct.
EXAMPLE:
If the establishment has seven Hispanic/Latino males whose jobs categorize as “Executive/Senior Level Officials and Managers”, put “7” in column 1, row 1.

| Job Categories | Male | Female | Hispanic or Latino | Male | Female | White | Black or African American | Native Hawaiian or Pacific Islander | Native American or Alaska Native | Two or More Races | Female | White | Black or African American | Native Hawaiian or Pacific Islander | Native American or Alaska Native | Two or More Races | Overall Totals |
|----------------|------|--------|-------------------|------|--------|-------|--------------------------|-----------------------------------|------------------|----------------|-------|--------------------------|-----------------------------------|------------------|----------------|----------------|
| Executive/Senior Level Officials and Managers | 7    | 0      | 0                 | 0    | 0      | 0     | 0                        | 0                    | 0                | 0                | 0 | 0                        | 0                    | 0                | 0              | 7              |
**NOTE:** After 15 minutes, the system will automatically log out unless you click the “Save” or “Save and Continue” button at the bottom. You can see your timer at the top of the matrix.

### Step 4-C: Complete Online Form

#### Entering your data

<table>
<thead>
<tr>
<th>Number Of Employees</th>
<th>Race/Ethnicity</th>
<th>Not Hispanic or Latino</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Male</td>
<td>Female</td>
</tr>
<tr>
<td>Hispanic or Latino</td>
<td>Male</td>
<td>Female</td>
</tr>
<tr>
<td>Job Categories</td>
<td>White</td>
<td>Black or African American</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Section will be closed if you do not hit **Save** or **Save & Continue** in 14 minutes and 38 seconds.
Clicking “Save” will save your work and restart the timer at the top of the page.

Clicking “Save & Continue” will save your work and take you to the next step.

Clicking “Cancel” will take you back to the screen containing your list of establishments without saving your progress.
Select “Yes” if the company or any of its establishments (a) have 50 or more employees AND (b) is not exempt as provided by 41 CFR 60-1.5, AND either (1) is a prime government contractor or first-tier subcontractor, and has a contract, subcontract, or purchase order amounting to $50,000 or more, or (2) serves as a depository of Government funds in any amount or is a financial institution which is an issuing and paying agent for U.S. Savings Bonds and Savings Notes. Select “No” if not.

If you selected “Yes”, enter your establishment’s Dun and Bradstreet identification number if you have one. This number is a unique nine-digit identifier for businesses used to establish a business credit file, which is often referenced by lenders and potential business partners to help predict the reliability and/or financial stability of the company in question.
Select the dates of the pay period used for the report. The dates used should encompass the start date of the desired pay period and the end date of the desired pay period. The starting date must be earlier than the ending date.

**NOTE:** You may only use data pulled from any one pay period in October, November or December of the reporting year.
The Remarks section is to add anything you feel is noteworthy, regarding the establishment. Otherwise, you may leave it blank.
Finally, click “Save and Continue”. You will be taken back to the page with your list of establishments. Under the “Status” column for the establishment you finished, you will see a for “Complete”. Reports with an for “Incomplete” will need to be completed.

*If you are a single-establishment company, when you click “Save and Continue”, you will be taken to the certification screen (Screen 91).
Step 1: Complete Online Form

Adding a new establishment

If your company has new establishments/locations, you must file for those establishments as well.

**NOTE:** If the establishment was obtained by an acquisition or merger, you must follow a different process. See Screens 118 – 123 for instructions regarding an acquisition or merger.
Adding a new establishment

There are two ways you can add a new establishment:

The first is from the main menu screen right after you log in. Select the “Add Establishments” button.
The second is from the screen with your list of establishments. From the main menu after logging in, click “EEO-1 Survey Data Filing Options” and select “Complete Online Form”. Near the top under the section “Add New Establishments”, select the button that says “click here”.

**Step 1-B: Complete Online Form**

Adding a new establishment

The second is from the screen with your list of establishments. From the main menu after logging in, click “EEO-1 Survey Data Filing Options” and select “Complete Online Form”. Near the top under the section “Add New Establishments”, select the button that says “click here”.

**Edit and Complete Establishment Reports**

To certify your EEO-1 survey you will first have to complete each of your establishments. *Type 2 Consolidated Report will be the last to complete before certification.* When establishments are complete they will be marked with a green "C" in the Status column, whereas incomplete reports will be marked with a red "I". When you are ready to complete information for a specific establishment please select "Edit" from the drop-down menu located directly to the left of the establishment number you would like to complete and press the "Go" button located next to this drop-down menu.

**Delete Establishment:**

If you need to delete an establishment please select "delete" from the drop-down menu located directly to the right of the establishment number you would like to delete and press the "Go" button located next to this drop-down menu.

**Add New Establishments:**

If you need to file for a new establishment please click here.
Select a type of report to fill out. The number of employees in the establishment you are adding will determine what type of report you should choose. For more information regarding report types, refer to Screens 57 – 65.
If you have filed a report for this establishment in the past and have the establishment number for it, click “Yes”, then enter the number into the box that appears, and click “Continue”.

If you have not, click “No” and then “Continue”. The establishment will be marked as “New”, and will receive an establishment number at a later date.
Step 4: Complete Online Form

Adding a new establishment

Enter the establishment’s name, EIN, NAICS code and address. See Screen 12 for more information on entering your company address.

Click “Save And Add Another” to add another establishment, or “Save”, if that is the one establishment to be added.
Step 1: Complete Online Form

Deleting an establishment

The first method for deleting an establishment can be accessed from the main menu screen right after you log in. Select the “Delete Establishments” button.
Deleting an establishment

From there, you will be asked if your company has closed any establishments since the previous survey year.

Select “Yes”, and a list of your establishments will appear. Click the boxes next to the establishments you would like to delete, and from the dropdown menu underneath the box, choose the reason that best answers why the establishment is closed. When you’re done, click “Save” and the establishment will be deleted.
The second deletion method is from the screen with your list of establishments.

From the main menu after logging in, click “EEO-1 Survey Data Filing Options” and select “Complete Online Form”. Under the “Action” column next to the establishment you want to delete, click the dropdown menu and select “Delete”. Then click the “Go” button.
Select the best reason for the establishment closing, then click “Mark as Closed”. The establishment will now be deleted.

- This Establishment Closed/This Establishment is Out of Business.
- This Establishment has been spinoff and is now independent of this company.
- This Establishment was involved in an acquisition or merger.
- Closed as Type-4 and Reported as Type-6.
- This Establishment was consolidated into another Establishment.
  a) Due to NAICS/EIN/Address/Client Site issue.
  b) Due to company restructuring.
  c) Due to deletion of teleworker to be placed into Establishment they report to.

[Button] Cancel  [Button] Mark as Closed
NOTE: For both deletion techniques, you will not be able to delete your Type 2 Consolidated report or your Type 3 Headquarters report.
On the page with your list of establishments, if all of your reports have been marked as complete, you will see this message at the top of the screen. Click the “Certify Reports” button to proceed with certifying your reports.
Verify that all the information shown on this page is correct. If you need to edit the Certifying Official information, you may do so by going to the main menu and clicking on the “Contact Update” button.
Before checking the box to certify your survey, please note all reports and information obtained from individual reports will be kept confidential as required by section 709(e) of Title VII. Willfully false statements on these reports are punishable by law, U.S. Code, Title 18, Section 1001.
Finally, check the box certifying that all data inputted is accurate, then click the “Certify” button. Your EEO-1 survey is now complete!
If you currently have any Type 6 reports, a reconciliation report will appear in your list of establishments to show you if there are any errors in the data you have inputted in the matrices.

The reconciliation report will not appear if you have chosen to use Type 8 reports for establishments with fewer than 50 employees.
Click the “Go” button under the “Action” column for the reconciliation report to determine where errors exist. You will be taken to a matrix that shows the breakdown of these errors.

In this example, under column 2, row 3, there are 10 Hispanic female technicians that appear to be missing.
• It is best to go through your reports and ensure that any unaccounted for employees were not simply placed in the wrong category.

• Remember that your Type 2 Consolidated report must show the complete breakdown of employees from all of your establishments. As such, the total number of employees in your Type 2 Consolidated report must equal the total number of employees from your Type 3, 4, and 6 reports combined.

Once you have fixed the data, the negative numbers in the reconciliation report matrix will be cleared, and you will be able to certify your reports.
Special Procedures

25% deletion warning

If you have deleted 25% or more of your company’s establishments, this screen will appear when you attempt to certify your reports.

Answer the questions to ensure that the establishments were correctly deleted, then click “Next”.  

Please answer ‘Yes’ or ‘No’ to describe why establishments were deleted.

1. Was at least one establishment deleted due to being a spinoff?
   - Yes
   - No

2. Was at least one establishment deleted due to being sold to, merged into, or acquired by another company?
   - Yes
   - No

3. Does at least one establishment deleted still exist and have at least one employee working there on a regular basis? (Excluding residential teleworkers)
   - Yes
   - No

4. Were all of these establishments deleted due to being closed, out of business, loss of contract, or restructuring of the company?
   - Yes
   - No
If you attempt to certify your reports, but only have a Type 2 and Type 3 report in your list of establishments, you will see a message on the screen stating that your reports are incomplete. If you only have the one location to report for, send an email to e1.techassistance@eeoc.gov stating this, so that your company can be switched from a multi-establishment to a single-establishment in the EEO-1 online system.

If you have other establishments to report, refer to Screens 79 – 84 to add these establishments.
Filing for the First Time

Screens 99 – 108
Step 1: Filing for the First Time

Navigate to registration page

If your company has never filed an EEO-1 survey, you will need to register your company in the EEO-1 online system.

Navigate to https://egov.eeoc.gov/eeo1/register.jsp to start your company’s registration.
Step 2: Filing for the First Time

Registration questionnaire

Answer the following questions, then click “Continue”. Your answers to this page will determine if your company is already registered or if it is required to file the EEO-1 survey. The system will not let you continue if you select “Yes” for any of the questions. A message will pop up explaining why.
Step 2-A: Filing for the First Time

Registration questionnaire

If you get the message after answering 'Yes' to the first question it is because your company has previously filed an EEO-1 report, and you do not need to re-register your company. If you do not know your login information, you can obtain this information by going to the login page at https://egov.eeoc.gov/eeo1/login.jsp. Click on “Forgot Password?” to get your password, and “Forgot Company Number?” to get your company number.
If your company received the above message after answering ‘Yes’ to the second question it is because you indicated your company has a parent company. The parent company is responsible for filing for your company under their own EEO-1 survey, even if both companies have different Federal Tax IDs.

If your company is now completely independent from your parent company, please refer to Screens 124 – 125 regarding spinoffs.
Step 2-C: Filing for the First Time

Registration questionnaire

If your company received the above message after answering ‘Yes’ to the third question it is because your company has spun off from another company and is now completely independent of them. You will need to contact the spinoffs department. Refer to Screens 124 – 125 regarding spinoffs.
Step 2-D: Filing for the First Time

Registration questionnaire

If your company received this message after answering ‘Yes’ to the fourth question it is because it is either a government, or is an elementary or secondary school system. You are not required to file the EEO-1 survey. You will be responsible for a different survey altogether.

For further information regarding state and local governments please see: https://egov.eeoc.gov/eeo4/

For further information regarding public school districts please see: https://egov.eeoc.gov/eeo5/index.htm
Step 3: Filing for the First Time

Registration questionnaire

After answering the initial three questions to see if you should register your company, you must answer a second set of questions that will determine if you are required to file the EEO-1 report for the survey year. Answering “Yes” to any of the three questions means you are required to file. Click “Continue” to proceed with registration. Answering “No” for all three questions means you are not required to file. You do not need to do anything else.
Step 4: Filing for the First Time

Registration form

Fill in the fields regarding your company’s and company contact person’s information. The contact person serves as your company’s contact for all matters regarding the EEO-1 survey. See Screen 12 for more information on entering your company address. When done, click the “Submit” button.

Afterwards, your company number/login ID will appear on the following screen. Be sure to save that information as it will not appear again. If you need your company number again, you will need to follow the steps in Screens 110 – 111.
Step 5: Filing for the First Time

Registration confirmation

You will be taken to a page confirming your company’s successful registration. You may print this information for your records by clicking the “Print This Page” button.

To obtain your password, check your email for a link which you must click to create your password (see Screen 7 for more help with this). After creating your password you can proceed to the login screen and begin your EEO-1 Survey.

Once you have your company number and password, you can click here to log in.
Alternate Login Scenario

Screens 109-116
Step 1: Alternate Login Scenario

Get company number

If your company has not received its 2018 notification letter or is unable to locate its company number/login ID and password for any reason, please follow these steps. To obtain your company number click on “Forgot Company Number?” on the login page.
Get company number

After clicking “Get Company Number” you will be directed to a new screen.

Fill in your company’s name, zip code, and contact person’s email address. The contact person’s email is the email we have on file for your company and is where your company number/login ID information will be sent, once you click “Submit”. For information on updating the contact person see the following screen (Screen 112).
You may change your Contact Person Email ID by sending the EEOC a signed change request on company letterhead with the company number/login ID (if known), name, title, phone number and email address of the new contact person at your company. This change request MUST be signed by an authorized company representative (anyone in your company authorized to sign documents) in order for the change request to be processed.

Please either scan and email this request to e1.techassistance@eeoc.gov or fax to 1-866-262-0032. Your new contact will receive an email with a new temporary password once your change request has been submitted. If you have any questions about this process you may contact the EEOC at 1-877-392-4647 or e1.techassistance@eeoc.gov.
Step 3: Alternate Login Scenario

Get password

In order to get your 2018 password click on “Get Password” on the EEO-1 login page.

Login ID/Company Number: LOGINID

Password:

Retype the characters from the picture:

HMBvn

Login

Get Password

Forgot Password?

Forgot Company Number?
Step 4: Alternate Login Scenario

Get password

After Selecting “Get Password” you will be directed to a new screen.

Input your company number/login ID into the field and click “Send Password Reset Link”.
Step 5: Alternate Login Scenario

Get password

At this point your contact person will receive an email with a link to create your password. Please refer back to Screen 112 for information on updating your contact person.

Click the link in the email (URL will be unique to you). You will be taken to a page where you can reset your password.
Step 6: Alternate Login Scenario

Get password

Enter your company number/login ID, and create your new password. Re-enter your new password in the “Confirm New Password” field, then click “Submit Password” to finish creating your password.

After pressing “Submit Password” you can navigate to the login page: [https://egov.eeoc.gov/eeo1/login.jsp](https://egov.eeoc.gov/eeo1/login.jsp) and login with your new password.

Make sure to follow these password specifications.
Appendix

Screens 117 – 133

Notes, Definitions, FAQs and Links
Acquisitions

Acquisition

An acquisition is a corporate action in which a company buys most, if not all, of the target company's ownership stocks in order to assume control of the target firm.
Acquisitions

If your company has undergone an acquisition, send an email to E1.ACQUISTIONSMERGERS@EEOC.GOV.

Your email should include the name, address, and company number/login ID of both the acquiring and the acquired companies.
Acquisitions

If a company acquired a small company that otherwise would not be required to file the EEO-1 report, or a company that has not previously filed the EEO-1 report, the acquiring company may proceed with adding the establishment(s) as a new establishment.
Acquisitions

Asset Acquisition

An asset acquisition is the purchase of a company by buying its assets instead of its stock.

If an establishment of your company was acquired through an asset acquisition, you do not need to report for that establishment/location.
Mergers

A merger is a legal consolidation of two entities to form a new entity.
Mergers

If your company has undergone a merger, send an email to E1.ACQUISITIONSMERGERS@EEOC.GOV.

Your email should include the names and company numbers/login IDs (if known) of all companies affected by the merger, the name and address of the corporate headquarters and the name of the new company.
A **spinoff** occurs when an establishment(s) from one company forms a new company that will file independently from its former parent company.

If your company has undergone a spinoff, send an email to **E1.SPINOFFS@EEOC.GOV**.
Your email should include the name, address, and company number (if known) of the current parent company.

Additionally, please include the establishment considered to be the new headquarters that should be spun off in the employer EEO-1 database with a list of all physical addresses for the new company.
Regarding PEOs

A Professional Employer Organization (PEO) provides human resource services for their small business clients—paying wages and taxes and often assisting with compliance of a myriad state and federal rules and regulations.

A PEO must report for all establishments of the companies they are filing for. They may not simply file a multi-establishment company as a single Type-4 establishment.
Regarding PEOs

Q. We are a PEO, do we file for our clients under our company number as establishments or do we file for each as a separate entity with its own company number?
A. As a PEO you will report your clients as establishments under your PEO’s Company Number.

Q. As a PEO many of our clients are companies that do not meet the requirements to file individually. Should they be included in our EEO-1? If so, how should they be reported?
A. Client companies of a PEO that on their own are not subject to EEO-1 filing requirements are excluded from the PEO’s EEO-1 reports.
Regarding PEOs

Q. Our PEO dropped service to a client, how do we treat this establishment?
A. Establishments that previously had been reported by a PEO but no longer, and do not meet the requirements to file individually, must be deleted. If employees appear at these establishments later, assigned unit numbers that were deleted may be retrieved. However, if the establishment does meet the requirements to file you will need to contact e1.spinoffs@eeoc.gov.

Q. Our PEO has several clients who we handle. These clients fall under our PEO EIN number and we report payroll and taxes for these client/employees. When submitting them on the EEO-1 report, do I use our company EIN number for ALL clients OR do I use the EIN number of each client when submitting the report?
A. If the establishments fall under your PEO’s EIN for payroll and taxes you will use the PEO’s EIN for all establishments.
Q. How do I change/update my contact person information?
A. If your EEO-1 contact person information has changed, submit a letter on company letterhead signed by an authorized company representative, indicating the updated contact's name, title, phone number and email address to the EEOC Employer Data Team at E1.TECHASSISTANCE@EEOC.GOV. Please remember to include your company number (if known) in your request.

Q. When I try to log in, it says the information I entered is invalid.
A. Double-check to ensure that you are inputting your password without any spaces in it (manually typing in your password can help). Additionally, remember that the password you used for the EEO-1 report in previous years will no longer work for the new reporting year. For information on logging in with new company number/login ID and password please see Screen 6.

Q. Do public non-profit, tax-exempt establishments need to file the EEO-1 report?
A. Yes.
Troubleshooting/FAQs

Q. I’m trying to add a new establishment, but I got an error that says “Error: EIN already in use”.
A. This error means this same EIN is already in use by another company completing their EEO-1. Please email E1.TECHASSISTANCE@EEOC.GOV with your company number/login ID and the establishment you are trying to create, along with the EIN you attempted to enter.

Q. I received two different login IDs for my company. Which one should I use?
A. If you received two different login IDs, your company may have accidentally been registered in the system twice. Send an email to the acquisitions and mergers department at E1.ACQUISITIONSMERGERS@EEOC.GOV with your contact information and both login IDs, and they will help correct the issue.

Q. My employee regularly reports to two different establishments. Which establishment should I report the employee under?
A. Report the employee to the establishment at which they spend the majority of their time. If it is equal, you may choose which establishment to report them under. You may not report them in both establishments.
Q. How do I report for employees that work from home?
A. Employees who telework, i.e., work from home, must be included in the EEO-1 report for the establishment to which they report. DO NOT indicate home addresses for these employees.

Q. If my company is an employment/staffing agency, how should I report for leased employees?
A. Leased Employee means a permanent employee provided by an employment agency for a fee to an outside company for which the employment agency handles all personnel tasks including payroll, staffing, benefit payments and compliance reporting. The employment agency shall, therefore, include leased employees in its EEO-1 report out of the establishment where their payroll is being handled. This will not include persons who are hired on a casual basis for a specified time, or for the duration of a specified job.

Q. How do I account for seasonal or part-time employees?
A. Part-time employees should be included in the EEO-1 report. Seasonal employees should not.
Troubleshooting/FAQs

Q. If I have employees who regularly report to an establishment, but my company does not own the establishment, do I still need to submit a report for that establishment?
A. Yes. You will report those employees under the address to which they report.

Q. Can I submit a paper copy of my EEO-1 report?
A. An employer who claims that preparation or the filing of Standard Form 100 would create undue hardship may apply to the Commission for a special reporting procedure. In such cases, the employer must submit in writing a detailed alternative proposal for compiling and reporting information to: EEOC Employer Data Team, U.S. Equal Employment Opportunity Commission (EEOC), Office of Enterprise Data and Analytics, 131 M St., NE, Washington, DC 20507. Only those special procedures approved in writing by the Commission are authorized. Paper EEO-1 forms will be generated on request only, in extreme cases where Internet access is not available to the employer.
Additional Resources

EEO-1 Instruction Booklet
https://www.eeoc.gov/employers/eeo1survey/2007instructions.cfm

EEO-1 Frequently Asked Questions and Answers
https://www.eeoc.gov/employers/eeo1survey/faq.cfm

Key Terminology and Definitions
https://www.eeoc.gov/employers/eeo1survey/terminology.cfm