Legislated Employment Equity Program

Employer User Guide

How to Complete and Submit an Annual Employment Equity Report using the Workplace Equity Information Management System
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INTRODUCTION

This guide is designed for use by federally regulated private-sector employers, federal Crown corporations and other federal government business enterprises with 100 or more employees subject to the Employment Equity Act (the Act) and covered by the Legislated Employment Equity Program (LEEP). It provides instructions to help employers produce and submit their annual employment equity reports using the online Workplace Equity Information Management System (WEIMS) application.

As a LEEP employer, your organization must submit an annual employment equity report by June 1st to the Labour Program of Employment and Social Development Canada (ESDC) covering information from the previous calendar year. This report consists of prescribed forms (Forms 1 to 6) and a narrative.

Note: Employers who are reporting for the first time are only required to submit the forms by gender, if they have not yet collected the data on Aboriginal peoples, persons with disabilities and members of visible minorities through a workforce survey. First time employers are also not required to submit a narrative report. All employers who are not reporting for the first time are expected to report on all four designated groups and to also submit their narrative reports.

The forms capture detailed information on all of your employees and the four designated groups (women, Aboriginal peoples, persons with disabilities and members of visible minorities) by:

- geographic location;
- Employment Equity Occupational Group;
- industrial sector;
- employment status;
- salary range; and
- number hired, promoted and terminated.

The narrative report describes the measures taken, the results achieved and the consultations held during the reporting period to implement employment equity.

WEIMS generates Forms 1 to 6 as required under the Act and provides analytical tools and templates to assist employers in meeting their reporting obligations. It also offers various tools to support employers in meeting their other obligations under the Act when being audited by the Canadian Human Rights Commission. Benefits of WEIMS include:

- application use is free of charge;
- a user-friendly design;
- built-in edit checks;
- automatic data calculations;
- an effective method of tracking employees for employment equity purposes;
- a simplified application of reporting requirements;
- a workforce analysis module; and
- a training module and other helpful resources.

Note: Throughout this document, including the table of contents, there are links to other sections of the document and to webpages. To use the links, hover over the link, hold down the Control (Ctrl) key on your keyboard and select the link.
LOGGING INTO WEIMS

The WEIMS website is: https://equity.esdc.gc.ca/sgiemt-weims/emp/WeimsMaintLogin.jsp.

To log into WEIMS you will need the employer number, username and password.

To change your password
Please take the following steps to change your password:
Under the “Login” section at the bottom of this webpage,
click on:
'I have forgotten my password'.
You will be redirected to a new screen:
‘Password Reminder’,
Enter your email address and click the Submit button.
You will receive an email from ee-eme@hrsdc-rhdcc.gc.ca with a link. Click on the link provided in the email, which will direct you to the ‘Password Reset’ screen.

IMPORTANT NOTICE: If you are a new user, please complete the Authorization Form to access the Workplace Equity Information Management System (WEIMS).

Any fields marked with an asterisk (*) are required fields.

*Employer Number              User Name

Password

I have forgotten my password

Login

If you experience difficulties working with WEIMS, please send an email to ee-eme@hrsdc-rhdcc.gc.ca
A username/password can be obtained by completing the Authorization Form found at the bottom of the WEIMS login page. Submit the signed form to ee-eme@hrsdc-rhdcc.gc.ca. Once the form has been processed, two emails will be sent to your inbox:

- The first email contains a username and a link prompting you to change your password.
- The second email will contain your employer number. You will have one hour to reset your password.

**Note: In the event that the hour elapses or if you have forgotten your password, you can use the “I have forgotten my password” function before emailing ee-eme@hrsdc-rhdcc.gc.ca.**

Please read the “Terms and conditions of use of WEIMS” on the login page prior to using the application.
COMMON FUNCTIONS

This section of the guide will break down the functions and purposes of each section found on the WEIMS Main Menu. Once you have successfully logged into WEIMS, you will see the WEIMS Main Menu, as shown below.

Note: All images in this document are sample views once data has been entered into WEIMS.
Menu Bar/Header Links

Français
WEIMS is available in both official languages. By selecting the Français link at the top of the page, users are able to change the website content to French.

Search Canada.ca
Selecting the search link at the top of the page gives users access to detailed dynamic search capabilities through all of Government of Canada websites.

Jobs, Immigration, Travel, Business, Benefits, Health, Taxes and More Services
Selecting any of these links will redirect users to the associated Government of Canada website.

WEIMS Main Menu
Part 1

Contact Us: This link directs you to the Labour Program’s mail and email contact information.
Help: This link directs you to the WEIMS Help page which contains useful guides and documents for completing the employment equity annual report.
Account Maintenance: This link allows you to update/change your account password or personal information. Once completed, you must select the Save button at the bottom of the page.
Log Out: This link allows you to log out of the application.

Use this for easy navigation.

This bar indicates which year you are signed into. This can be altered in the Employer Section below.

This bar indicates whether you have submitted the forms for the year that you are signed into. A yellow bar indicates the forms have not been submitted. A blue bar indicates the forms have been successfully submitted.
Part 2

Employer

**Reporting Year**: This drop-down menu allows you to change the reporting year by choosing the desired year and selecting the **Change Reporting Year** button. You can select previous years to view previous annual report submissions, variance reports and workforce analysis results.

**Update your employer information**: This directs the user to the general information on the employer such as employer number, name, address and contact information. It is strongly recommended that the user keeps this information up-to-date as it affects the information seen on Form 1 and the Labour Program’s ability to contact you. More information is available [HERE](#).

Employees for (Employer Name)

**Search for an employee record**: This link will bring you to a page that will allow you to search for an employee in the database based on parameters including employee number, hire or termination dates, National Occupational Classification (NOC) codes and more.

*Note: The employee must have been still active for the selected year. For example, you cannot search for an employee in 2017 who was terminated in a previous year.*

**Add a New Employee**: You can manually add a new employee by selecting this link. All sections with a red asterisk (*) are mandatory and must be completed. More information is available [HERE](#).

**Upload an employee record set**: This is where you will upload your quantitative data used in Forms 1 to 6. More information is available [HERE](#).

**Copy active employee records from previous calendar year**: This is where employers with fewer than 200 employees and minor workforce changes can quickly update their previous year’s data. More information is available [HERE](#).

**Create a backup file for year**: A backup file of the uploaded data can be downloaded and saved.
Workforce Analysis

This section assists your organization in meeting its other obligations under the Employment Equity Act (e.g., conduct a workforce analysis and flow data analysis, as well as set goals).

Analytical Tools

Variance reports are excellent tools for determining variances between two consecutive reporting years, along with what may be the cause of the variance. More information is available HERE.

Forms

Forms 1 to 6 are automatically generated when the data has been uploaded to the system. More information is available HERE.

Forms

The forms were last compiled 2017-03-21 19:23 (EST)
The forms have not been submitted for calendar year 2016.
The compiled forms are up-to-date. (Recompile Anyway)

- Form 1 - Report Summary
- Form 2 - Occupational Groups
- Form 3 - Salary
- Form 4 - Employees Hired
- Form 5 - Employees Promoted
- Form 6 - Employees Terminated
- Narrative Report
- Form Submission
- File Closure Summary Report

Analytical Tools

Variance Reports

- Year-to-Year Occupational Group
- Year-to-Year Occupational Group Variance Explanations
- Year-to-Year Bottom Line
- Year-to-Year Bottom Line Variance Explanations
- Year-to-Year Salary Comparison
- Data Verification
- Significant Variances

Workforce Analysis

Set Workforce Analysis Defaults

- Women, Aboriginal Peoples and Visible Minorities
- Persons with Disabilities

Workforce Analysis Report

- Detailed Report
- Summary Report
- Comparison Detailed Report
- Comparison Summary Report
- Goal Setting Report
- Flow Data Analysis

If you experience difficulties working with WEIMS, please send an email to es-erne@hrsd-crdsc.gc.ca
OVERVIEW OF FUNCTIONS

Update Your Employer Information

Within WEIMS, Labour Program administrators will be responsible for the initial creation of the general employer record. Once created, users can view their existing details and make changes when required by selecting the Update your employer information link from the WEIMS Main Menu. This allows users to keep their own employer information current. After selecting the link from the WEIMS Main Menu, users will be brought to the first of five information tabs. Always press Save at the bottom of the screen, when changes have been made and before selecting a new tab.

General Tab
This tab includes general information about the employer including name and country. If you wish to change the country, use the drop-down menu.

Region and Division Tabs
Regional and division information is primarily used for conducting workforce analyses. This information is optional and not required for LEEP reporting. The Region and Division tabs provide an empty region or division code table that can be customized to describe the organization of the employer. Users can define codes for the employer’s regions or divisions/departments, and then use these codes to identify an employee’s location in the organization. Users may define an unlimited number of region or division codes; however, an individual employee can only be assigned one region or division code. Region and division codes are not required by the system.

To insert new region or division information, users must select the Insert button after selecting the tab they would like to update. Once this button is selected, users will be provided with an ID text field and a Title text field to fill in. Both fields are mandatory. Once complete, users must select the Save button at the bottom of the page. Saved records will then be displayed in a list view that users can select from when adding/updating employee information.

Region and Division information can be edited after it is entered in the system. Additional regions and divisions can be added by selecting the Insert button at the bottom of the screen or deleted by selecting the next to the field.

Address Tab
When an employer selects the Address Tab, they will be automatically shown the address for the Principle Place of Business. Users can change/update their Principle Place of Business as well as their Mailing Address by using the text boxes and drop-down lists provided and selecting the appropriate link.

If the Mailing Address is the same as the Principle Place of Business, you can simply select the check box located beside the text Address same as Principle Place of Business? and the application will automatically capture the information.
Contact Tab
When a user selects the Contact Tab, the employer's main contacts will be displayed. Users can select the links at the top of the tab to toggle between contacts. It is strongly encouraged and recommended to keep this information up-to-date. Users can add new contacts by selecting the [Add New Contact] at the top right hand side of the tab. After entering all the necessary information, the user must select the Save button at the bottom of the page.
SUBMISSION PROCESS

**Step 1 – Collect Workforce Data**

**Step 2 – Upload/Update Employee Data**
There are four methods that can be used to upload or enter the workforce data to WEIMS:

- **2.1 Option 1 – Create Text Files**
- **2.2 Option 2 – Use Backup File from Previous Calendar Year**
- **2.3 Option 3 – Manual Upload and Edits**
- **2.4 Option 4 – Copy Active Employee Records from Previous Calendar Year**

**Step 3 – Verify Forms and Variance Reports**

**Step 4 – Prepare/Upload Narrative Report**
There are three methods that can be used to prepare, upload or enter the narrative report to WEIMS:

- **4.1 Option 1 – Create and Upload a Document**
- **4.2 Option 2 – Complete and Upload the Narrative Report Template Form**
- **4.3 Option 3 – Use the Narrative Report Template Tool in WEIMS**

**Step 5 - Submit Report**
STEP 1 - COLLECT WORKFORCE DATA

To obtain your workforce data, you need to survey all your employees with a voluntary self-identification questionnaire. The purpose of the workforce survey is to determine whether each employee belongs to one or more of the groups designated by the Act. The information on women may be obtained from payroll/personnel files.

Note: Employers who are reporting for the first time are not required to conduct a workforce survey. They are only required to submit the forms by gender. All employers who are not reporting for the first time are expected to conduct a workforce survey and to report on all four designated groups.

To assist you with the workforce survey, you may refer to Step 1: Initiating the Program and Collecting the Data, Task D - Collect Workforce Data.

A Self-identification Questionnaire Frequently Asked Questions and Self-identification Questionnaire Template are also available under the WEIMS Help page, General Documents (LEEP and FCP) section.

Elements that must be included in your workforce survey

- **Privacy Statement** – indicate that responses are strictly confidential and are used only for employment equity purposes.
- **Employee Identifier** – ensure ability to identify the employee who completed the questionnaire.
- **Voluntary** – indicate that responses to the questions are voluntary. You can make it mandatory for employees to return the questionnaire whether or not it is completed.
- **Updates** – indicate that employees can change their answers or previously submitted information at any time.
- **Accurate Definitions** – use official designated group definitions for Aboriginal peoples, persons with disabilities and members of visible minorities as demonstrated in the sample found in the link above.
- **More than One Designated Group Membership** – inform employees that they can self-identify as a member of more than one designated group (for example, a woman with a disability).
- **Alternate Format** – indicate that the survey can be made available in alternative formats and/or help is available to complete the survey successfully.

1. When the survey is completed, you will need to record the following results:

- The number of self-identification questionnaires sent out to employees or the number of employees who were surveyed.
- The total number of blank, partially and fully completed self-identification questionnaires that were returned.
- The number of fully completed self-identification questionnaires returned.
2. You must ensure that your survey results are kept up-to-date by providing the self-identification questionnaire to:

- Newly hired employees.
- Employees who wish to change or update information previously submitted.
- Any employee who requests it.

3. You must also update the information in your database or in WEIMS to reflect new data resulting from the activities outlined in Step 2 above, as well as from employee promotions and terminations.
STEP 2 – UPLOAD/UPDATE EMPLOYEE DATA

After collecting the workforce data through the self-identification survey, it must be coded then uploaded to WEIMS or directly data entered in WEIMS in order to generate Forms 1 to 6 and various other information related to your annual employment equity report.

The following options are available in order for you to code and prepare your data for upload or data entry to WEIMS:

1. Create Text (Tab delimited) (*.txt) files (recommended method);
2. Use a backup file from the previous calendar year;
3. Manually upload and edit employee records; or
4. Copy active employee records from the previous calendar year.

2.1. Option 1 – Create Text Files

For this method, you will need to create Text (Tab delimited) (*.txt) files which contain your organization's quantitative data that you will be uploading into WEIMS. A Text or .txt file is a specific file format. You can open and save a .txt file through Microsoft Excel or Notepad. Microsoft Excel is recommended as it is much easier to use this program to create, format and manipulate the data.

With this method:

- All the data is compiled into one to three documents and only needs to be uploaded once.
- The data can be created and updated by the user in Microsoft Excel before converting to a .txt file.
- Changes can also be made in the document and re-uploaded as many times as required, or changes can be made manually in the system.
- Forms 1 to 6 are generated at the time of uploading.
- The formatting of the documents must be exact in order for the system to recognize and read the documents correctly.

You will need to create one mandatory file (employee.txt) and two optional files (term.txt and promo.txt) to upload your data into WEIMS. It is very important to use the proper naming conventions. WEIMS will not recognize any deviations to the names of the files. The files are to be saved in .txt format and to be named as employee.txt, term.txt and promo.txt.

2.1.1. Create an employee.txt file

The employee.txt file is required and acts as the master file. It contains all the employees and their employment information. You will need to create one record or row for each employee.
Sample

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>111</td>
<td>06</td>
<td>10</td>
<td>0112</td>
<td>5179</td>
<td>02</td>
<td>M</td>
<td>39944</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>1998-01-01</td>
<td></td>
<td></td>
</tr>
<tr>
<td>222</td>
<td>04</td>
<td>11</td>
<td>0515</td>
<td>5179</td>
<td>01</td>
<td>F</td>
<td>38405</td>
<td>N</td>
<td>Y</td>
<td>N</td>
<td>2000-05-04</td>
<td></td>
<td></td>
</tr>
<tr>
<td>333</td>
<td>03</td>
<td>12</td>
<td>1111</td>
<td>5179</td>
<td>03</td>
<td>M</td>
<td>31588</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>444</td>
<td>02</td>
<td>18</td>
<td>1222</td>
<td>5179</td>
<td>03</td>
<td>M</td>
<td>33184</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>555</td>
<td>07</td>
<td>15</td>
<td>0513</td>
<td>5179</td>
<td>05</td>
<td>F</td>
<td>36868</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>666</td>
<td>06</td>
<td>10</td>
<td>0111</td>
<td>5179</td>
<td>04</td>
<td>Mat Leave</td>
<td>F</td>
<td>33784</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>2015-10-12</td>
<td>2016-05-16</td>
</tr>
</tbody>
</table>

Column A: Employee Number
- Maximum 20 characters.¹
- Can be letters or numbers or a combination of both.
- Must be unique (no duplicates).

Column B: Census Metropolitan Area (CMA) Code
- The CMA is based on the geographic location where the employee works. If needed, consult the CMA subdivisions and geographic maps to determine the CMA.
- Must be exactly 2 digits.¹
- Must correspond to the values in the Province and CMA codes under the WEIMS Help page, General Documents (LEEP and FCP).
- Must correspond with the Province/Territory code.

Column C: Province/Territory Code
- Use the province/territory code for the geographic location where the employee works.
- Must be exactly 2 digits.¹
- CMA and Province/Territory code must correspond to one another.
- Must correspond to the values in the Province and CMA codes under the WEIMS Help page, General Documents (LEEP and FCP).

Column D: National Occupational Classification (NOC) Code
- The NOC is the nationally accepted reference on occupations in Canada that provides a standardized framework for organizing work information in a manageable, understandable and coherent system.
- Must be the most recent position occupied on December 31st of the reporting year.
- Must be exactly 4 digits.¹
- Must be a valid 4-digit NOC code.
- Use NOC 2011 version codes related to the employee’s occupation based on the work usually performed, determined by the tasks, duties and responsibilities of the occupation.

Note: Once you have coded your workforce data by NOC and imported the data into WEIMS, your workforce will automatically be rolled up into the 14 Employment Equity Occupational Groups (EEOGs). References are available for EEOG definitions and a list of the EEOGs and their corresponding NOC codes.

¹ Ensure leading zeros are included by first typing an apostrophe (e.g., ’04, ’0011, ’05678), if applicable.
**Column E: North American Industry Classification System (NAICS) Code**
- The NAICS is a national industry classification system that allows for distinguishing the different economic activities in which businesses are engaged.
- Must be exactly 4 digits.
- Must be a valid 4-digit NAICS code.
- Use NAICS 2007 codes related to the type of industry that the employee is working in.

**Column F: Employee Status Code**
- Must be exactly 2 digits.\(^2\)
- There are five options:
  - 01 - Permanent full-time
  - 02 - Permanent part-time
  - 03 - Temporary
  - 04 - Other
  - 05 - Casual
- Descriptions of the status codes are available in Employee Status codes under the WEIMS Help page, General Documents (LEEP and FCP).

**Column G: Comments**
- Column is required but can be left blank or used to make notes. The notes cannot be viewed by ESDC users or staff and will not have any effect on the data or statistical analysis.
- Column is necessary for WEIMS to read data correctly.

**Column H: Sex**
- Must be exactly 1 letter.
- Must be F for female or M for non-female or no response.
- If you leave the cell blank, it will cause an error.

**Column I: Salary**
- Salary is the annual remuneration paid for work performed by an employee in the form of salary, wages, commissions, tips, bonuses and piece rate payments, rounded to the nearest dollar, but do not include overtime wages.
- Must be a whole number, no decimals, no dollar signs, no commas and no spaces.
- Minimum salary is 0.
- There are some cases when employees’ salaries need to be annualized to reflect yearly earning. Annualization is the process whereby employees’ salaries are calculated to represent what their salary would have been had they been paid for the entire year even though they only worked part of the year. Generally, employees’ salaries should be annualized when they have not worked the full year or have been hired or promoted part way through the reporting year.

The following table summarizes when you need to annualize and not annualize salaries.

<table>
<thead>
<tr>
<th>Do not Annualize Salary</th>
<th>Annualize Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permanent employees, who were not hired, promoted or demoted during the reporting</td>
<td>Permanent employees, who were hired, promoted or demoted on a permanent basis</td>
</tr>
</tbody>
</table>

---

\(^2\) Ensure leading zeros are included by first typing an apostrophe (e.g., ’04), if applicable.
<table>
<thead>
<tr>
<th>Do not Annualize Salary</th>
<th>Annualize Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Permanent employees who experienced a permanent change in employment status part-way through the reporting year (e.g., from full-time to part-time or vice versa).</td>
<td>• Permanent employees who experienced a temporary change in employment status during the reporting year.</td>
</tr>
<tr>
<td>• Temporary employees.</td>
<td>• Temporary employees who experienced a change in employment status to permanent full-time or part-time during the reporting year – these employees are considered newly hired as of the status change date.</td>
</tr>
<tr>
<td>• Seasonal employees who worked a full season.</td>
<td>• Seasonal employees who worked part of a complete season or term (e.g., if an employee worked only for four months of a six month season, the salary must be annualized to reflect the earnings of the six months period).</td>
</tr>
<tr>
<td>• Permanent employees on paid leave of absence who received salary or income replacement benefits for the entire year or on December 31 – add salary earned and income replacement benefits.</td>
<td>• Permanent employees who were on paid or unpaid leave of absence granted at the employee's request (e.g., maternity, parental, personal or educational leave, on loan or secondment) who returned to work on or before December 31 of the reporting year – exclude the taxable benefit/compensation.</td>
</tr>
<tr>
<td>• Permanent employees on unpaid leave of absence who did not receive any salary or income replacement benefits for the entire year or on December 31 – if the employee retained the right to return to work, classify as “other”, employee status code 04 and use $0 salary.</td>
<td>• Permanent employees who received a salary that includes commission – add salary and commission, and then annualize the total.</td>
</tr>
<tr>
<td>• Commission-only salaried employees.</td>
<td>• Transferred permanent employees as a result of a corporate transaction – these employees are considered new hires as of the transaction change date.</td>
</tr>
<tr>
<td>• Permanent employees who received a fluctuating base salary plus commission.</td>
<td>• Permanent employees who were suspended without pay.</td>
</tr>
<tr>
<td>• Temporarily laid off employees who returned to work before December 31 – if temporarily laid-off on December 31 and the employee retained the right to return to work, classify as “other”, employee status code 04 and use $0 salary.</td>
<td></td>
</tr>
<tr>
<td>• Employees recalled in accordance with a collective agreement part way through the reporting year.</td>
<td></td>
</tr>
<tr>
<td>• Employees on strike or lock-out.</td>
<td></td>
</tr>
<tr>
<td>• Employees in an acting assignment (not a</td>
<td></td>
</tr>
<tr>
<td>Do not Annualize Salary</td>
<td>Annualize Salary</td>
</tr>
<tr>
<td>-------------------------------------------------------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>permanent change).</td>
<td></td>
</tr>
<tr>
<td>• Salary protected or red circled employees.</td>
<td></td>
</tr>
<tr>
<td>• Employees doing community service.</td>
<td></td>
</tr>
<tr>
<td>• Moving employees from a provincially-regulated division to</td>
<td></td>
</tr>
<tr>
<td>a federally-regulated division within the same organization -</td>
<td></td>
</tr>
<tr>
<td>not considered new hires.</td>
<td></td>
</tr>
<tr>
<td>• Employees who do not have regular pay per pay period (e.g.,</td>
<td></td>
</tr>
<tr>
<td>work fluctuating hours or paid by the mile).</td>
<td></td>
</tr>
</tbody>
</table>

To annualize the salary use the following calculation:

\[
\text{Number of pay periods per year} \times \text{Salary per pay period} = \text{Annualized salary}
\]

**Examples #1:**
- A clerk earns $1,592 bi-weekly and was absent for three months on unpaid personal leave.
- Since the pay is bi-weekly, there are 26 pay periods per year.
- The salary recorded for the reporting year would be \(26 \times 1,592 = 41,392\).

**Examples #2:**
- An agent was hired on June 1st of the reporting year and earns $463 per week.
- Since the pay is weekly, there are 52 pay periods per year.
- The salary recorded for the reporting year would be \(52 \times 463 = 24,076\).

**Column J: Aboriginal Peoples**
- Must be exactly 1 letter.
- Must be Y (yes) or N (no).
- If employee did not self-identify, N must be used as the default answer.
- If you leave the cell blank, it will cause an error.

*Note: Employers reporting for the first time should use N, if they have not collected the data for this designated group. All employers who are not reporting for the first time are expected to have collected this data and to report it.*

**Column K: Members of Visible Minorities**
- Must be exactly 1 letter.
- Must be Y (yes) or N (no).
- If employee did not self-identify, N must be used as the default answer.
- If you leave the cell blank, it will cause an error.
Note: Employers reporting for the first time should use N, if they have not collected the data for this designated group. All employers who are not reporting for the first time are expected to have collected this data and to report it.

**Column L: Persons with Disabilities**
- Must be exactly 1 letter.
- Must be Y (yes) or N (no).
- If employee did not self-identify, N must be used as the default answer.
- If you leave the cell blank, it will cause an error.

Note: Employers reporting for the first time should use N, if they have not collected the data for this designated group. All employers who are not reporting for the first time are expected to have collected this data and to report it.

**Column M: Hire Date**
- Must be 10 characters.
- Format must be YYYY-MM-DD or YYYY/MM/DD (include dashes or slashes).
- Must always be blank for TEMPORARY or CASUAL employees, as the information will be entered in the term.txt file.

**Column N: Termination Date**
- A termination means retired, resigned, laid off, dismissed or otherwise having ceased to be an employee but does not include laid off temporarily or absent by reason of illness, injury or a labour dispute.
- Must be 10 characters.
- Format must be YYYY-MM-DD or YYYY/MM/DD (include dashes or slashes).
- Must always be blank for TEMPORARY or CASUAL employees, as the information will be entered in the term.txt file.

Note: The column headings in row 1 are very useful when creating your file. However, remember to delete this entire row before you save and upload this file into WEIMS in order to avoid errors.

2.1.2. Create a term.txt file
The term file is an optional file and only needs to be created if you have temporary or casual employees. You will need to create one record or row for each temporary or casual employee’s term contract received during the calendar year. For example, if a temporary or casual employee received one term contract, then create one row. If a temporary or casual employee received two term contracts, then create two rows, one for each term contract, etc.

Do not create this file if your organization did not employ temporary or casual employees during the reporting period.
Sample

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Employee #</td>
<td>Term #</td>
<td>Start Date</td>
</tr>
<tr>
<td>333</td>
<td>1</td>
<td>2016-03-03</td>
<td>2016-12-03</td>
<td>2016-05-03</td>
</tr>
<tr>
<td>444</td>
<td>1</td>
<td>2016-07-25</td>
<td>2016-10-25</td>
<td></td>
</tr>
<tr>
<td>555</td>
<td>1</td>
<td>2016-04-01</td>
<td>2016-06-30</td>
<td></td>
</tr>
<tr>
<td>555</td>
<td>2</td>
<td>2016-07-14</td>
<td>2016-11-30</td>
<td></td>
</tr>
</tbody>
</table>

**Column A: Employee Number**
- Maximum 20 characters.
- Can be letters or numbers or a combination of both.
- Employee number must exist in employee.txt file.

**Column B: Term Number/Number of Contracts**
- Maximum 4 digits.
- Create a row for each term contract received during the calendar year. If an employee received 2 term contracts in the same calendar year, there must be 2 rows, etc.
- Term number must be entered chronologically.

**Column C: Start Date**
- Must be 10 characters.
- Format must be YYYY-MM-DD or YYYY/MM/DD (include dashes or slashes).

**Column D: End Date**
- This is the final day of the term or contract.
- Must be 10 characters.
- Format must be YYYY-MM-DD or YYYY/MM/DD (include dashes or slashes).

**Column E: Termination Date**
- This is used when an employee was terminated before the end of their term/contract.
- Can be left blank.
- Must be 10 characters.
- Format must be YYYY-MM-DD or YYYY/MM/DD (include dashes or slashes).

*Note: The column headings in row 1 are very useful when creating your file. However, remember to delete this entire row before you save and upload this file into WEIMS in order to avoid errors.*

2.1.3. Create a promo.txt file
The promo file is optional and **only** needs to be created if one or more employees have been promoted during the calendar year. A promotion occurs when an employee has permanently moved from one position or job to another position or job that has a higher salary than the salary of the position or job previously held by the employee and ranks higher in the organizational hierarchy of the employer. It also includes a reclassification of the employee’s position or job where the reclassified position or job meets the above requirements.
You will need to create one record or row for each promotion. For example, if an employee was promoted once, then create one row. If an employee was promoted twice, then create two rows, one for each promotion, etc. If an employee was not promoted, do not create a row for that employee.

Do not create this file if your organization did not promote anyone during the reporting period.

Sample

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee #</td>
<td>Promotion #</td>
<td>Promotion Date</td>
</tr>
<tr>
<td>111</td>
<td>1</td>
<td>2014-03-03</td>
</tr>
<tr>
<td>111</td>
<td>2</td>
<td>2016-07-25</td>
</tr>
<tr>
<td>222</td>
<td>1</td>
<td>2016-04-01</td>
</tr>
</tbody>
</table>

**Column A: Employee Number**
- Maximum 20 characters.
- Can be letters or numbers or a combination of both.
- Employee number must exist in employee.txt file.

**Column B: Promotion Number**
- Maximum 4 digits.
- Create a row for each promotion that occurred during the calendar year. If an employee received 2 promotions, there must be 2 rows, etc.
- Promotion numbers must be entered chronologically.

**Column C: Promotion Date**
- Must be 10 characters.
- Format must be YYYY-MM-DD or YYYY/MM/DD (include dashes or slashes).

Note: The column headings in row 1 are very useful when creating your file. However, remember to delete this entire row before you save and upload this file into WEIMS in order to avoid errors.

2.1.4. Save files in .txt format
To convert the employee, term and promo Excel files to .txt file format follow these steps:

1. In Excel, go to **File** or **Microsoft Office** button, and then select **Save As**.
2. In the **File name** box, enter “employee”, “term” or “promo”, depending on which file you are creating.
3. In the **Save as type** box, use the drop-down arrow, scroll down and select **Text (Tab delimited) (*.txt)** option.
4. Select the **Save** button.
5. A dialog box appears, reminding you that you want to save the file as a text file, select the **Yes** button.
2.1.5. Upload the .txt files into WEIMS
To upload the .txt files into WEIMS, follow the steps below.

1. On the WEIMS Main Menu page, ensure that the appropriate reporting year is selected (e.g., in 2017, you will be using 2016 reporting year).
2. Under Employees for (Name of Your Organization), select Upload an employee record set.
3. In the Import Employee Data page, under Add New File, next to the File to upload box, select the Browse... button.
4. Go to where you saved your employee.txt file on your computer and select the file. The employee.txt file will appear in the File name box. Select the Open button. Then, select the Upload button in WEIMS. You will see your document appear in the table above the Add New File table.

If you have made any manual changes to employee information in WEIMS, select Update employees for 20XX (current reporting year). If this is the first upload or no manual changes have been made, either option is acceptable.

Make sure this box is checked.

Select button once all applicable files have been uploaded. An Import log will be generated. Wait for the email to determine if any errors need to be corrected.

Once you have selected your employee.txt file, select the button. If you have a term.txt or promo.txt file, they must all be uploaded before you import. Any time you re-upload a file, all the files (if applicable) must be uploaded again as well.

Your employee.txt, term.txt and promo.txt files will appear here after you select.
5. If you have a term.txt file, go to where you saved your `term.txt` file in your computer and select the file. The `term.txt` file will appear in the File name box. Select the **Open** button. Then, select the **Upload** button in WEIMS. You will see your document appear in the table above the Add New File table.

6. If you have a promo.txt file, go to where you saved your `promo.txt` file in your computer and select the file. The `promo.txt` file will appear in the File name box. Select the **Open** button. Then, select the **Upload** button in WEIMS. You will see your document appear in the table above the Add New File table.

7. Once all the necessary documents have been uploaded, select an import option. If there have been any manual changes to employee information, select **Update employees for 20XX**. If this is the first upload or no manual changes have been made to employee information, either option is acceptable.

   Note: The overwrite employees option deletes all previously stored data for the session year. The update employee option appends new information to existing records through employee numbers only. It also uploads and appends newly created records.

8. Select **Compile Forms After Data Upload**.

9. Select the **Import the uploaded files** button.

10. A message will be displayed informing you that the employee import process will begin. Select the **OK** button.

11. An import log will be generated and automatically sent to you by email. Only address the log that is sent to your email. The import log will let you know of any errors that need to be fixed (red or orange colored information).

12. Once the import has been successful, forms 1-6 are generated.

### 2.1.6 Troubleshooting

The formatting of the .txt files is very important. Errors will occur if there are problems with the formatting. Errors are generally easy to fix. The user will need to go to their original Excel file, make the corrections, save as .txt and re-upload all the applicable documents into WEIMS.

The following are some common import log errors and their solutions.

*Error: The system could not find the 'employee.txt' file. Please upload this file to the server before importing.*

---

3 The **Update employees for 20XX** import option will display the current reporting year.
The files must be in .txt format and named employee, term or promo. Any deviation from this naming convention means WEIMS will not recognize the document and will abort the uploading process. To fix this error, rename the files appropriately and re-upload all applicable files.

Error: File 'employee.txt' / Line '105' / Employee number '1140' was already found on line '19'. Record is being ignored.

Any duplicate employee numbers will cause an error. Double check your Excel file for errors. If the line is a duplicate, delete the repeated row and re-upload all applicable files.

Data truncation
Error: There was a problem loading in line #3 from 'employee.txt' into the database. If you cannot determine what the issue is with this record, please contact the WEIMS administrator. This record has not being uploaded.

Many formatting errors could be causing this error. Some possible errors to look for include, but are not limited to, improper saving format (e.g., used Unicode Text (*.txt) instead of Text(Tab delimited) (*.txt)), extra columns in the document, NOC or NAICS codes with too many digits, incorrect date format or a combination of various formatting issues. Anything causing this error will need to be fixed in the .txt document and re-uploaded with all applicable files.

Warning: File 'employee.txt' / Line '3' / Employee number '3': Invalid hire date '03-26-2016'. Record is being ignored.

Invalid hire date is one of the most common errors. There are many different causes for this error in the employee.txt document. In the example above, the date is in the incorrect format. However, extra columns in the document, errors in the dates, failure to remove column headings in row 1, saving the .txt document(s) as Unicode Text, and other formatting mistakes will cause the invalid hire date error. Anything causing this error will need to be fixed in the document and re-uploaded with all applicable files.

Warning: File 'promo.txt' / Line '25' / Employee number '9104': Invalid promotion date '2016-09-01'. Record is being ignored.

Same as the error above, many formatting errors could be causing this error in the promo.txt document. The date is correct in this example, therefore checking the formatting of the document is necessary. Extra columns in the document, errors in the dates, failure to remove column headings in row 1 and other formatting mistakes will cause the invalid promotion date error. Anything causing this error will need to be fixed in the document and re-uploaded with all applicable files.

Warning: The system could not find the 'term.txt' file.
It is assumed that there are no temporary or term employees within your company for this calendar year. If you have forgotten to upload this file, please do so and re-import the data into WEIMS.

You will receive this type of error message if you have not uploaded a term.txt or promo.txt file. If your organization did not employ any temporary employees and did not promote anyone during the calendar year, you do not need to upload these files and this warning can be ignored.
34 employees had their status changed from TEMPORARY to CASUAL because they have worked less than 12 weeks during this calendar year. The employees are:
1017 1171 1143 1083 1084 1134 1175 1136 1161 1179 1081 1082 1097 1110 1120 1183 1185 1187 1191 1193 1057 1107 1113 1145 1155 1206 492 640 816 1041 1055 1106 1199 1200

For employment equity purposes, a temporary worker means a person who is employed on a temporary basis and worked for 12 weeks or more during the calendar year. A casual employee means a person who is employed less than 12 weeks during the calendar year. This error is corrected within the system, it is not necessary to re-upload any documents.

2 employees have no valid record in the term table:
1116 2175

Temporary and casual employees must be included in the employee.txt and term.txt files. Check both files to make sure they have not been forgotten.

2 employees were not imported from 'employee.txt' because their hire date was after the reporting year. The employees are:
2075 2076

Only information pertaining to the report year should be uploaded. For example, if you are uploading data for the 2016 report, any hire dates for 2017 are not to be included. It is not necessary to update your file and re-upload. However, it is recommended you update your file nonetheless.

2 employees had invalid or missing NOC codes. These employees were not imported into the database. The employees are:
3 (0000) 7 (0000)

Ensure that all NOC codes are 4-digits long and up-to-date in the file. To fix this error you will need to make the appropriate changes and re-upload the file with any other applicable files.

2 employees had invalid or missing CMA codes. These employees were not imported into the database. The employees are:
15356 (11) 15951 (18)

CMA and Province codes must correspond. To fix this error, double check your file for any errors and make sure the CMA and Province codes correspond. The problematic employee numbers are listed in the error. Make the appropriate changes and re-upload all applicable documents to WEIMS.

2.2. Option 2 – Use Backup File from Previous Calendar Year

If your organization had already submitted an annual employment equity report in the previous year, you can extract a copy of the employee information then update it to help reduce the time spent on creating a new dataset file.
The following steps will lead you through the process of creating and updating your dataset by using the previous year’s data as the starting point.

1. Sign into WEIMS. From the **WEIMS Main Menu**, go to **Reporting Year** drop-down menu and change the year to the previous report year. Be sure to select the **[Change Reporting Year]** button. For example, if you are working on the 2016 report that is being submitted in 2017, then change the reporting year to 2015.

2. Make a backup copy of the previous year’s report by selecting **Create a backup file for 20XX**4, then **Save** the file to your computer. The file will be automatically saved as **WEIMSBackup20XX.txt**5.

3. Open Microsoft Excel, select **Open** file. Go to where you saved the **WEIMSBackup20XX.txt** file, use the drop-down menu at the bottom right of the screen next to the File name bar and select **Text Files (*.prn; *.txt; *.csv)**. Select the **[WEIMSBackup20XX.txt]** file, then the **Open** button at the bottom of the screen.

4. The Text Import Wizard - Step 1 of 3 window will appear. Select the **Next >** button.

5. The Text Import Wizard - Step 2 of 3 window will appear. Select the **Next >** button.

6. The Text Import Wizard - Step 3 of 3 window will appear. Select the **Finish** button.

7. Update the file:

   a. Delete the top five rows which contain unnecessary programming information and any similar rows at the bottom of the file. You only need to keep the rows that display data in more than five columns.

   b. Ensure that the formatting is correct. You can verify this by comparing it to the sample **employee.txt** file. Delete any extra blank columns (i.e., you may have to delete columns I and J, if they are blank).

   c. Remove any employees terminated in the previous year. For example, if you are working on the 2016 report that is being submitted in 2017, remove anyone terminated in 2015 or earlier. Only 2016 information is required.

   d. Verify and update the NOC and NAICS codes, as well as the salaries, if required.

   e. Add in any new hires for your current reporting year. For example, if you are working on the 2016 report that is being submitted in 2017, then add those who were hired in 2016.

   f. Update termination dates. For example, if you are working on the 2016 report that is being submitted in 2017, then add only those who were terminated in 2016.

   g. Determine if you need to **create a term.txt file** or **create a promo.txt file**.

8. Follow the instructions to **Save files in .txt format**, **Upload the .txt files into WEIMS** and **Troubleshooting**.

---

4 The **Create a backup file for 20XX** link will display the previous reporting year.

5 The **WEIMSBackup20XX.txt** file will display the previous reporting year.
2.3. Option 3 – Manual Uploads and Edits

You have the option to manually data enter your workforce information in WEIMS. Employee records can also be searched and edited once a dataset has already been uploaded to WEIMS.

2.3.1. Add Employee Records

You can manually add single employee records to the system by selecting Add a New Employee link from the WEIMS Main Menu, under the heading Employees for (Employer Name). Once selected, the Employee: General input screen will be displayed where you can enter the employee information using the tab controls provided. Remember to always select the Save button located at the bottom of the page. After an employee record has been successfully saved to WEIMS, you can return to this screen to edit and append new information (e.g., promotions or termination).

General Tab

In this input screen, you can enter the employee information using the tab controls provided. The following are additional functions included on this page:

Calculate Salary: This link allows you to calculate the employee’s salary based on the salary type, base salary and bonuses.

Search for NOC: This link allows you to search for a NOC code by entering a search phrase (e.g., enter “clerk” or “manager”) and selecting the Search button. You can then select the appropriate NOC code from the drop-down list provided.

At Time of Hiring Tab

In this input screen, you can add additional information about the employee at the time they were hired. Once again, the NOC search functionality has been made available on this screen. After completing the data entry, select the Save button at the bottom of the page.

Promotions Tab

This screen allows you to keep track of employee’s promotions over time. Selecting the button will display Promotion Date, Salary and NOC fields where you can add detailed information about the promotion. Once again, the NOC search functionality has been made available on this screen. You can select the button multiple times if the employee has had multiple promotions throughout the same reporting year. After all the desired information is entered, select the Save button at the bottom of the page.

Periods of Contract Tab

If the employment status of the new employee was selected as temporary or casual on the General tab, a Periods of Contract tab will appear following the Promotions tab. Selecting the button will display additional data fields where you can add the employee Start Date, End Date and Termination Date. You can select the button multiple times if the employee has had multiple periods of contract throughout the same reporting year. Once all information is entered, select the Save button at the bottom of the page.
2.3.2. Search/Edit Employee Records
Once employee records have been entered or uploaded to WEIMS, you have the ability to search for existing employee records by selecting **Search for an employee record** from the **WEIMS Main Menu** under the heading **Employees for (Employer Name)**. After selecting the link, you will be able to narrow your search based on multiple parameters using the pre-defined drop-down lists, date select and text fields. You also have the ability to define which fields are returned in the search results interface.

If you want to change an employee record, after the search parameter(s) have been selected, you can choose the desired employee number and make the required updates. Remember to always press the **Save** button when changes have been made and before selecting a new tab. If you do not wish to save your changes, or decide not to make changes, select the **Abandon Changes** button.

Note: Search results are only effective for the selected year. If you wish to search an employee’s record in a previous year, you will need to first change the Reporting Year on the **WEIMS Main Menu** page, then select **Search for an employee record**.

---

2.3.3. Compile Forms 1 to 6
Once you have updated all of your organization’s employee data for the calendar year, you can compile your data and create Forms 1 through 6 as required under the Act by following the steps below.

1. Sign into WEIMS. From the **WEIMS Main Menu**, under the Forms section, select the **Compile the employee records into forms 1 to 6**.

2. A Message from webpage will appear. Select the **OK** button to go ahead with compiling the employee records into the forms, understanding that any existing records for the calendar year in question will be overwritten.

3. A detailed compilation log will be generated on the **Recompile Employee Data** page. Once the compilation process has been completed, you will be able to select the **Go to the Main Menu page** link at the bottom of the page.

4. Forms 1 to 6 will be displayed under the **Forms** section on the **WEIMS Main Menu** page.
2.4. Option 4 – Copy Active Employee Records from Previous Calendar Year

If your organization is small in size (has fewer than 200 employees) and has already submitted an annual employment equity report in the previous year, you can copy active employee information from the year before to the present year, instead of having to re-enter it for the consecutive year. Once you copied the data, you’ll only need to update it and then submit it for the current year.

The following steps will lead you through the process of copying and updating the previous year’s data.

1. Sign into WEIMS. From the **WEIMS Main Menu**, select the **Copy active employee records from previous calendar year**.

2. A Message from webpage window will appear. Select the OK button to go ahead with the copying of the data.

3. You will notice that now at the top of your **WEIMS Main Menu** page, the light blue bar will display the number of active employees that have been copied to this reporting year.

4. Update the individual employee data using the **Search for an employee record** from the **WEIMS Main Menu**. Verify and update the salaries, NOC and NAICS codes, promotion, termination and any other data, if required.

5. Add in any new hires for your current reporting year by using the **Add a New Employee**. For example, if you are working on the 2016 report that is being submitted in 2017, then add those who were hired in 2016.

6. Follow the instructions on how to **Compile Forms 1 to 6** to generate your forms.
STEP 3 – VERIFY FORMS AND VARIANCE REPORTS

Forms 1 to 6

After uploading or entering and compiling your data into WEIMS, links to the resulting Forms 1 to 6 will be displayed in the Forms section on the WEIMS Main Menu. Selection of any of the six forms will load the applicable form and data and will provide access to all other forms in a tab-based view.

If you did not confirm the Compile Forms After Data Upload box was checked prior to uploading/importing your employee records or if any manual changes were made to the employee records, you may need to compile or recompile your data. You can do this by selecting the Recompile Anyway link located on the WEIMS Main Menu, under the Forms section. This will bring you through the same series of steps as outlined in Compile Forms 1 to 6.

The following information covers the six forms and their content. You must verify the displayed information located in each form to ensure that your organization and employee records are presented accurately in the forms. You can navigate from form-to-form by selecting the corresponding tab located at the top of the page to verify the information displayed in each form. All forms will be populated based on the information that was compiled. Each form is available in Portable Document Format (PDF) by selecting the Get ‘PDF’ versions of Form X located at the bottom of each form page.

Note: Forms 2 to 6 will be generated for each NAICS code where you employ 1,000 or more individuals. If there is more than one NAICS code but with fewer than 1,000 employees, then the employees will be automatically rolled up into the largest NAICS code.

Form 1 – Report Summary

Form 1 provides a general summary of the employer. It has three main components.

1. Identification – name of employer, address and contact information which is verified by updating the employer screen and is confirmed in the form submission screen. If required, you can Update your employer information from the WEIMS Main Menu screen.

2. Report Summary – displays the number of employees by industrial sectors (NAICS codes), employment status and geographical area.

3. Certification – requires the signature of a senior officer of the reporting employer with signing authority, who is listed in the ‘Officers’ section of the form, to certify the accuracy of the submitted report. If required, select Update your employer information from the WEIMS Main Menu, and then update the authorized signing authorities under the Contact Tab.
Once you are confident that the correct information is displayed on all forms, you will need to download the unsigned certificate of accuracy then re-upload it into WEIMS after it has been signed using the following steps:

1. In the **Form 1 – Report Summary** page in WEIMS, scroll down to the Signed Certification of Accuracy section and select **Download Unsigned Certificate of Accuracy**.

   - The number of permanent full-time and part-time employees is as of December 31st. The number of temporary employees is on the peak date (i.e., the date during the reporting year in which the number of temporary employees was the largest).
   - This is the number of employees on the peak date.
   - Download the unsigned Certificate of Accuracy from here.

   You can select the tabs to toggle between forms.

   Upload the signed Certificate of Accuracy here.
2. Select the **Open** button, print the document, obtain the signature of the senior officer of your organization, scan and save the signed form on your computer.

3. Sign into WEIMS. From the **WEIMS Main Menu**, select **Form 1 – Report Summary**, scroll down the page to the Signed Certification of Accuracy section and select the **Browse...** button.

4. Go to where you saved your signed Form 1 file in your computer and select the file. The file will appear in the File name box. Select the **Open** button. Then, select the **Attach Signed Certification of Accuracy** button.
Form 2 – Occupational Groups
Form 2 collects data on the number of all employees and members of the designated groups in the 14 pre-defined Employment Equity Occupational Groups (EEOGs) and corresponding salary ranges and quarters by geographical area.

Note: For permanent full-time and permanent part-time employees, the data is as of December 31st of the reporting year. For temporary employees, the data is based on their peak date.

The table below summarizes which Forms 2 will be automatically generated by WEIMS depending on the employment status, location and size of your workforce.

<table>
<thead>
<tr>
<th>Form</th>
<th>Employment Status</th>
<th>Location</th>
<th>Required when</th>
</tr>
</thead>
<tbody>
<tr>
<td>2A</td>
<td>Full-time</td>
<td>National</td>
<td>Always</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Province/Territory</td>
<td>≥ 100 employees in Province/Territory</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CMA</td>
<td>≥ 100 employees in CMA</td>
</tr>
<tr>
<td>2B</td>
<td>Part-time</td>
<td>National</td>
<td>Always, unless no part-time employees on December 31st</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Province/Territory</td>
<td>≥ 100 employees in Province/Territory</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CMA</td>
<td>≥ 100 employees in CMA</td>
</tr>
<tr>
<td>2C</td>
<td>Temporary</td>
<td>National</td>
<td>Temporary employees are ≥ 20% of the workforce</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Province/Territory</td>
<td>Temporary employees are ≥ 20% of the workforce and ≥ 100 employees in Province/Territory</td>
</tr>
<tr>
<td></td>
<td></td>
<td>CMA</td>
<td>Temporary employees are ≥ 20% of the workforce and ≥ 100 employees in CMA</td>
</tr>
</tbody>
</table>
Form 3 – Salary
Form 3 collects data on the number of all employees and members of the designated groups according to pre-determined salary ranges by geographical area.

The table below summarizes which Forms 3 will be automatically generated by WEIMS depending on the employment status, location and size of your workforce.

<table>
<thead>
<tr>
<th>Form</th>
<th>Employment Status</th>
<th>Location</th>
<th>Required when</th>
</tr>
</thead>
<tbody>
<tr>
<td>3A</td>
<td>Full-time</td>
<td>National</td>
<td>Always</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Province/Territory</td>
<td>≥ 100 employees in Province/Territory</td>
</tr>
<tr>
<td>3B</td>
<td>Part-time</td>
<td>National</td>
<td>Always, unless no part-time employees on December 31&lt;sup&gt;st&lt;/sup&gt;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Province/Territory</td>
<td>≥ 100 employees in Province/Territory</td>
</tr>
<tr>
<td>3C</td>
<td>Temporary</td>
<td>National</td>
<td>Temporary employees are ≥ 20% of the workforce</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Province/Territory</td>
<td>Temporary employees are ≥ 20% of the workforce and ≥ 100 employees in Province/Territory</td>
</tr>
</tbody>
</table>

The total number of employees is based on the active full-time employees as of December 31<sup>st</sup>.

The salary ranges are pre-determined.

The total number of employees is based on the active full-time employees as of December 31<sup>st</sup>.
Form 4 – Employees hired

Form 4 records data on the number of all employees and members of the designated groups hired during the reporting period by EEOG and geographical area.

The table below summarizes which Forms 4 will be automatically generated by WEIMS depending on the employment status, location and size of your workforce.

<table>
<thead>
<tr>
<th>Form</th>
<th>Employment Status</th>
<th>Location</th>
<th>Required when</th>
</tr>
</thead>
<tbody>
<tr>
<td>4A</td>
<td>Full-time</td>
<td>National</td>
<td>Always</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Province/Territory</td>
<td>&gt; 100 employees in Province/Territory</td>
</tr>
<tr>
<td>4B</td>
<td>Part-time</td>
<td>National</td>
<td>Always, unless no part-time employees on December 31&lt;sup&gt;st&lt;/sup&gt;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Province/Territory</td>
<td>&gt; 100 employees in Province/Territory</td>
</tr>
<tr>
<td>4C</td>
<td>Temporary</td>
<td>Not required</td>
<td></td>
</tr>
</tbody>
</table>
Form 5 – Employees Promoted

Form 5 records data on the number of all employees and members of the designated groups promoted during the reporting period by EEOG and geographical area. These employees are recorded in the EEOG in which they were last assigned.

The table below summarizes which Forms 5 will be automatically generated by WEIMS depending on the employment status, location and size of your workforce.

<table>
<thead>
<tr>
<th>Form</th>
<th>Employment Status</th>
<th>Location</th>
<th>Required when</th>
</tr>
</thead>
<tbody>
<tr>
<td>5A</td>
<td>Full-time</td>
<td>National</td>
<td>Always</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Province/Territory</td>
<td>≥ 100 employees in Province/Territory</td>
</tr>
<tr>
<td>5B</td>
<td>Part-time</td>
<td>National</td>
<td>Always, unless no part-time employees on December 31st</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Province/Territory</td>
<td>≥ 100 employees in Province/Territory</td>
</tr>
<tr>
<td>5C</td>
<td>Temporary</td>
<td>Not required</td>
<td></td>
</tr>
</tbody>
</table>
Form 6 – Employees Terminated

Form 6 records data on the number of all employees and members of the designated groups whose employment was terminated during the reporting period by EEOG and geographical area. These employees are recorded in the EEOG in which they were last assigned.

The table below summarizes which Forms 6 will be automatically generated by WEIMS depending on the employment status, location and size of your workforce.

<table>
<thead>
<tr>
<th>Form</th>
<th>Employment Status</th>
<th>Location</th>
<th>Required when</th>
</tr>
</thead>
<tbody>
<tr>
<td>6A</td>
<td>Full-time</td>
<td>National</td>
<td>Always</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Province/Territory</td>
<td>≥ 100 employees in Province/Territory</td>
</tr>
<tr>
<td>6B</td>
<td>Part-time</td>
<td>National</td>
<td>Always, unless no part-time employees on December 31st</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Province/Territory</td>
<td>≥ 100 employees in Province/Territory</td>
</tr>
<tr>
<td>6C</td>
<td>Temporary</td>
<td>Not required</td>
<td></td>
</tr>
</tbody>
</table>
Variance Reports

The Variance Reports aim to help employers track and explain year-to-year variances in their quantitative portion of their annual employment equity report (Forms 1 to 6). Specifically, the Variance Reports allow employers to:

- Compare variances by occupational group, bottom line and salary.
- Verify data and employee movement.
- Summarize variances over multiple reporting years.

There are seven reports that can be generated. All significant variances are highlighted in red and must be explained in the Narrative Report and/or in the Form Submission tab in the last step of the submission process.

3.1. Year to Year Occupational Group

This report will display employee changes in the EEOGs between two consecutive reporting years and highlight significant variances. This report takes into account the hires and the terminations that occurred in the current reporting year.

Any EEOG displaying a significant variance will be highlighted in red. A significant variance is defined as one of the following:

1. Any occupational group that has a change +/- 10 employees AND a 15% change is considered to be significant.
2. The above statement also applies when the previous year had 0 employees and a change +/- 10 employees occurs (i.e., this situation results in a divide by zero error).
3. +/- 1,000 employees is considered a significant variance regardless of percent change.
3.2. Year to Year Occupational Group Variance Explanations
This report breaks down the information of the Year to Year Occupational Group variance report and provides potential explanations for variances based on employee movements between EEOGs and employment status groupings.

3.3. Year to Year Bottom Line
This report displays changes in employees by gender and designated groups that occurred between two consecutive reporting years and identifies significant variances. It takes into account the hires and the terminations that occurred in the current reporting year.

Significant variances are highlighted in red and calculated the same as in the Year to Year Occupational Group variance report.

3.4. Year to Year Bottom Line Variance Explanations
This report breaks down the information of the Year to Year Bottom Line variance report and provides potential explanations for variances based on employee movements, employment status and, at times, changes in the self-identification survey by designated group and gender.

3.5. Year to Year Salary Comparison
This report compares the top and bottom salary ranges within each EEOG for two consecutive years and highlights significant variances identified.

Significant variances are highlighted in red and defined as any top or bottom salary range with a net range +/- 5 or more. The net range is the difference in the number of salary range levels between the current and previous calendar year’s reported salary range.

3.6. Data Verification
This report allows for verification of employee movements from year to year. It identifies changes to employee records and missing employee information. You can use the report to verify errors in employee records and/or provide an explanation in the submission/Narrative Report. The report contains confidential employee information and cannot be accessed by ESDC users or staff. A message is displayed at the bottom of each page of the report reminding employers that the intent of this report is for “internal” use only and not to be submitted.

3.7. Significant Variances
This report provides a summary of the significant variances identified in the Year to Year Occupational Group, Year to Year Bottom Line and Year to Year Salary Comparison variance reports.
STEP 4 – PREPARE/UPLOAD NARRATIVE REPORT

The narrative report is the qualitative portion of your annual employment equity report. It allows for an explanation and measurement of progress in the attainment of projected employment equity goals.

The report must include:

- Measures taken by the employer during the reporting period to implement employment equity;
- Results achieved during the reporting period in relation to measures implemented; and
- A description of the consultations that occurred between management and employees’ representatives (unionized and/or non-unionized) during the reporting period concerning the implementation of employment equity.

Note: Employers who are reporting for the first time are not required to submit a narrative report.

Three options are available for you to prepare and/or upload your narrative report to WEIMS:

1. Create a document (e.g., Microsoft Word, PDF) and upload it;
2. Complete and upload the Narrative Report Template form which is available from the WEIMS Help page; or
3. Prepare your report directly in WEIMS using the Narrative Report Template Tool.

Once you have completed the Narrative Report in Microsoft Word or PDF, upload it here.

The Narrative Report Template Tool is one option you can use to write your narrative report.
4.1. Option 1 – Create and Upload a Document

For this method, you will need to first create your narrative report document using, for example, Microsoft Word or PDF, then upload it to WEIMS.

Components of the narrative report

- **General Overview** – summarize events that have influenced the activities of your organization during the reporting period, including corporate structure, geographic location where your organization operates and information on acquisitions, mergers, transfer of employees, layoffs, strikes, reorganizations and other structural changes, as well as a general synopsis of the organizational climate.
- **Quantitative Information** – provide a brief description of the data on the designated group members for the reporting year.
- **Measures and Results** – provide a brief description of the measures taken to support your employment equity program during the reporting year and results achieved.
- **Challenges/Constraints** – describe constraints or restrictions encountered in implementing your employment equity program during the reporting year.
- **Consultations with Bargaining Agents and/or Employee Representatives** – report on consultations between management and union/employee representatives held during the reporting period.
- **Future Strategies** – describe your short-term and long-term employment equity initiatives.

To assist you in preparing your narrative report and to view a sample, you may refer to [Step 5: Submitting an Annual Report – For LEEP Employers Only, Task B: Develop a Narrative Report](#).

Once your narrative report is completed, upload it to WEIMS using the following steps. A video is also available online to show you how to upload your narrative report to WEIMS.

1. Sign into WEIMS. From the WEIMS Main Menu page, under Forms, select Narrative Report.
2. In the Narrative Report page, under Upload a document (Word, RTF, etc.) containing the report, next to Select the language of the report you are uploading, use the drop-down menu to select English or French.
3. Select the [Browse...](#) button.
4. Go to where you saved your narrative report file in your computer and select the file. The narrative report file will appear in the File name box. Select the [Open](#) button. The file will appear in the box below the Attach Finalized Narrative Report 20XX6.
5. Select the [Attach](#) button. A message will appear at the top of the page to confirm that the narrative report has been attached.

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6 The Attach Finalized Narrative Report 20XX title will display the current reporting year.
4.2. Option 2 – Complete and Upload the Narrative Report Template Form

The Narrative Report Template is a form designed to collect all information required to complete your report and is available under the WEIMS Help page.

Once completed, you can print, scan, then save it to your computer and follow the same steps as above to upload it to WEIMS.

4.3. Option 3 – Use the Narrative Report Template Tool in WEIMS

The Narrative Report Template Tool is another option that you can use to create your report directly in WEIMS. A video is also available online to assist you with using this tool.

1. Sign into WEIMS. From the WEIMS Main Menu page, under Forms, select Narrative Report.
3. You will be directed to the Overview screen (the first of seven tabs) of your report where you can data enter the information in the boxes, answer questions, use the drop-down menus and add dates as required, then select the Save button at the bottom of the page. A message will appear at the top of the page to confirm the data has been saved.
4. Select the Quantitative tab. You can data enter the information in the boxes, answer questions, use the drop-down menus, explain significant variances in the data, then select the Save button at the bottom of the page. A message will appear at the top of the page to confirm the data has been saved.
5. Select the Measures/Results tab, and then select the Add New Measures/Results link at the bottom of the page. Use the drop-down menu and data enter information in the boxes, and then select the Save button. You may add more than one measure/result under this tab by repeatedly selecting the Add New Measures/Results link and saving the information.
6. Select the Constraints tab, data enter the information in the box and select the Save button. A message will appear at the top of the page to confirm the data has been saved.
7. Select the Consultations tab, use the drop-down menu and answer the questions. Select the Save button. A message will appear at the top of the page to confirm the data has been saved.
8. Select the Future Strategy tab, and then data enter the information in the boxes. Select the Save button. A message will appear at the top of the page to confirm the data has been saved.
9. Select the **Preview** tab, where you can view your completed narrative report. If you wish, you may go back to any of the previous tabs to make changes.
STEP 5 – SUBMIT REPORT

Once you have completed the qualitative and quantitative portions of your annual employment equity report, including running the necessary reports, you are ready to submit the information.

From the **WEIMS Main Menu** page, under **Forms**, select **Form Submission**. Follow the instructions provided on the page and as shown below.

Always press the **Save** button after you make any updates or changes.

*Note: There is an automatic system time out after 20 minutes. If you intend to be on the **Form Submission** screen for an extended period of time, save your progress at regular intervals.*

The **Notes from Employer** box is used to enter any information that you feel is pertinent but did not have a chance to fully explain in another section.

**Potential Form Submission Problems**

This section is also known as red flags. It lists any issues pertaining to the report that are not significant variances. Review and provide the necessary explanations and use the drop-down menus to confirm each item. If a problem is corrected before submission, it will no longer appear here as a problem that needs to be explained.

**Variance Explanations**

This section allows you to explain any significant variances found in the Significant Variance report. Explanations for significant variances must be provided in the Narrative Report and/or in this section. If there is no significant variance, please type No Significant Variance or N/A, and then use the drop-down menu to confirm each item.
**Address and Officer Confirmation**
You must confirm all addresses and contact information. If any of the information needs to be updated, you can select the **Modify** link to make the necessary changes.

**Certification of Accuracy**
Use the drop-down menu to confirm the signing authority of the officer who signed Box 20 (the Certification of Accuracy) on Form 1 and enter the person’s name and position title in the appropriate boxes.

Once all documents are uploaded, all explanations have been provided and all sections are confirmed, select the **Submit ‘20XX’ (current reporting year) Data** button to submit your report.
After the report has been submitted, you can review/search the information that has been entered but will not be able to make any additional updates unless you contact the Labour Program by email at ee-eme@hrsdcrehdc.gc.ca.

It is recommended that you download a backup file of the data used and submitted in your annual employment equity report by selecting Create a backup file for 20XX from the WEIMS Main Menu, and then save the file to your computer for future reference.

**Note:** All the individual employers’ submitted annual reports are validated, consolidated and analyzed into the Employment Equity Act Annual Report, which is tabled to Parliament by the Minister of Employment, Workforce Development and Labour, and then all the individual employers’ submitted Forms 1 to 6 are made available to the public.

**FEEDBACK**

The Labour Program of ESDC continually strives to improve its documentation and service to Canadians. If you have any comments or suggestions on how to strengthen this document, please contact us at ee-eme@hrsdcrehdc.gc.ca.

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7 The Create a backup file for 20XX link will display the current reporting year.