



Canadian
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Commission
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droits de la personne

Pay Equity

PAY EQUITY PLAN TOOL

User Guide

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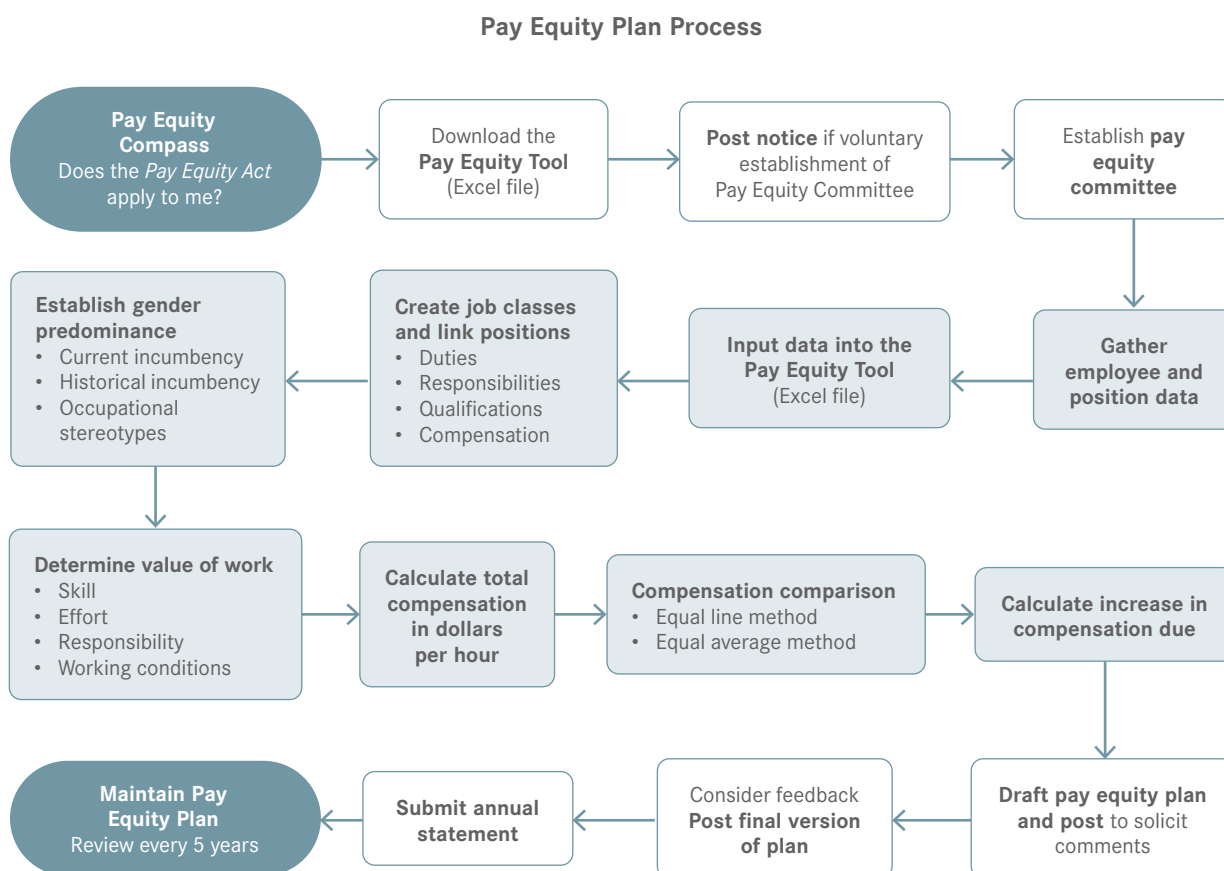
Note: The use of this tool and any related materials to develop your pay equity plan does not restrict the way the Pay Equity Commissioner's staff handles pay equity matters, nor the Pay Equity Commissioner's discretion to make decisions about any plan developed using this tool. This tool is also not a substitute for legal advice.

Introduction

The purpose of this User Guide is to assist you in using the Pay Equity Tool to create your pay equity plan. It should be used in conjunction with the resources available on our [Pay Equity Website](#).

The guide follows each step required to create a pay equity plan. The visual flowchart below illustrates the various steps involved, and the sections in light blue show the steps that can be done within the Pay Equity Tool.

The Canadian Human Rights Commission does not assume responsibility for the accuracy of the results generated by the Pay Equity Tool, which depend on the data entered by the user.



Target Audience

The Pay Equity Tool and this User Guide are designed to support small- to medium-sized federally regulated organizations in creating their pay equity plan. While you may use any of the individual worksheets, it should be noted that the tool was designed to guide users through the entire process of creating their pay equity plan one step at a time, where information entered in one tab of the tool informs the next tab.

What the tool can be used for

- Input or import employee and position data to create job classes.
- List your job classes and link your positions to an established job class.
- Calculate the current gender predominance of your job classes.
- Evaluate job classes using the point factor method (only) created for this tool.
- Calculate the hourly value of total compensation.
- Determine whether there are any gaps in total compensation between male- and female-predominant job classes if you have used the job evaluation method established within the tool. The equal average method will be used to calculate the amounts owing in accordance with the Regulations.
- Create a summary document of the pay equity plan if you have used the tool for all the prior steps.

What the tool cannot do

- Group together job classes.
- Use a different job evaluation method.
- Use the equal line or an alternate method to determine compensation gaps.
- Extract your data into a separate document.

How the Tool Works

The Tool and this guide are organized to follow each step required to create a pay equity plan. At the beginning of each section, you will find a visual flowchart that shows you where you are in the process.

For each chapter of this User Guide, you will find the following:

- A) A list of steps or instructions to follow.
- B) Screenshots from the Tool illustrating how to input your data.
- C) Links to references, supporting documents and worksheets.

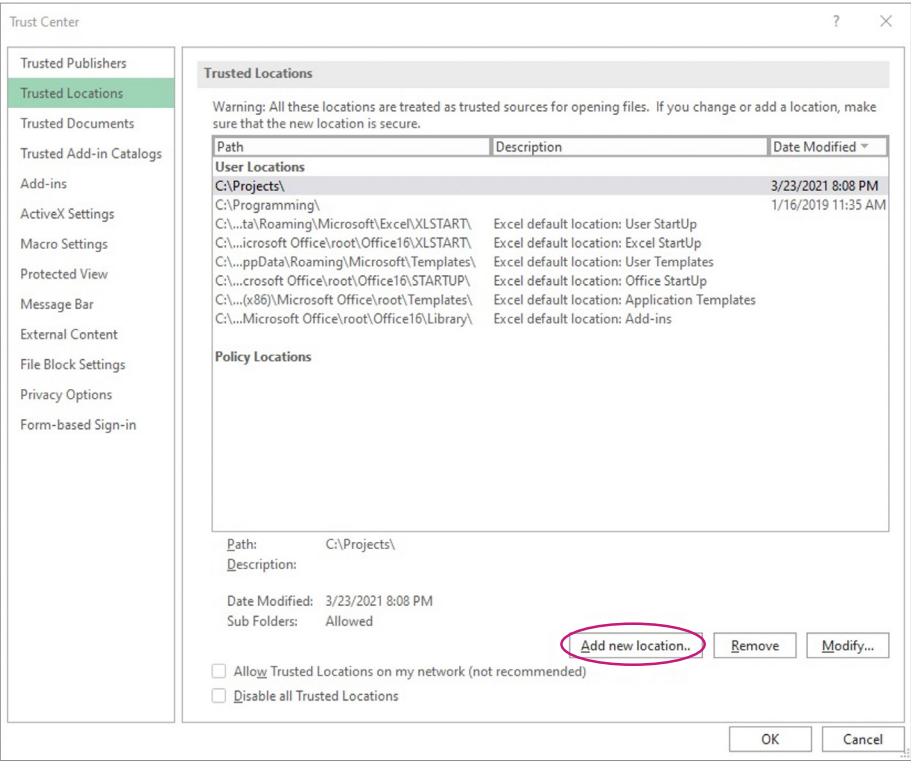
A few points to note about the Tool and the User Guide.

- **Prior to using the tool, you will need to do the following:**
 1. Download the Tool and save it as a .xlsm file in a local folder (see Table 1).
 2. Add that folder to a trusted location under File\Options\Trust Center\Trust Center Settings\Trusted Locations (see Table 1.1).
- You can input data into any yellow shaded field in the Tool. Fields with a white background are automatically populated by the Tool and are not editable.
- The Tool will assist you in streamlining your content to create your pay equity plan. Each tab in the Tool builds off previously entered information, so it is important not to skip any tabs unless they are marked as optional.
- The Tool will automatically refresh and save your data as you move from one tab to the next.

Table 1
Saving the Excel file

File name:	PEP Tool
Save as type:	Excel Macro-Enabled Workbook (*.xlsm)
Authors:	Excel Workbook (*.xlsx)
	Excel Macro-Enabled Workbook (*.xlsm)
	Excel Binary Workbook (*.xlsb)
	Excel 97-2003 Workbook (*.xls)

Table 1.1
Trusted Locations



When you open the Tool, you will notice an initial tab at the bottom of the Excel spreadsheet called “Navigation.” This tab includes a table of contents and will assist you in navigating the Tool (see Table 2).

Table 2
Navigation Tab

Navigation	Employee Count Worksheet	Employer Information	1.1 Employee Data	1.2 Establish Job Classes	1.3 Job Class Worksheet
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Collecting Data

You will need to gather information about your employee population to create your pay equity plan. The type of information you will need is outlined at the beginning of [Step 1](#) of this User Guide. Allow time in your planning to gather, review and clean up your data, since accurate data will make the rest of the work go more quickly. Data cleaning is the process of removing or fixing data that does not belong in your dataset. For example, this could include removing duplicates and updating information.

For additional information to assist you in calculating the number of employees in your organization, you can access the **Employee Count worksheet** in the Tool.

The **Employer Information** tab is important as it captures key data required to be submitted with your plan, such as the dates and the employee count for your organization (see Table 3). When you are ready to start creating your pay equity plan, you will select a date to gather and input your data. This date is referred to as your initial data snapshot date.

Table 3
Employer Information Tab

Employer Data		
A	Name of Employer/Group of Employers:	
B	Are you part of a group of employers that has been approved by the Pay Equity Commissioner?	
C	Date the group becomes subject to the Pay Equity Act:	
D	Does your organization have a pay equity committee?	
E	Multiple plans: Only complete the following if you have received permission from the Pay Equity Commissioner to have more than one pay equity plan:	
	Number of pay equity plans:	
	Name of this Pay Equity Plan:	
F	Number of employees in the organization:	

Notes	

Pay Equity Plan Development		
G	What method was used to determine the male comparators?	Not applicable
H	Date of initial data snapshot:	
I	Date of final dataset snapshot:	
J	Plan Completion date:	

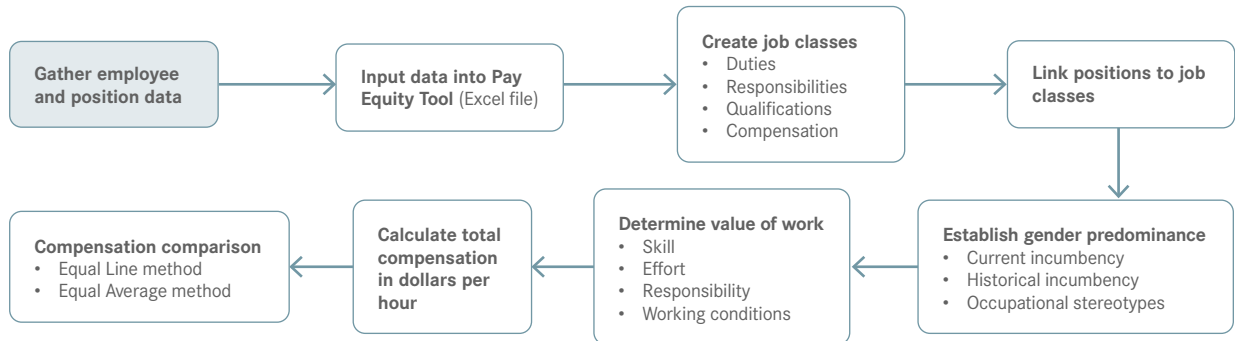
Notes	

Since employee data will change over time (e.g., leave of absences, new hires, departures), you should take note of your initial snapshot date in the **Employer Information tab** (see Table 3).

You must update your data before posting your draft plan for employee input.

Step 1: Creating job classes

Gather Employee and Position Data

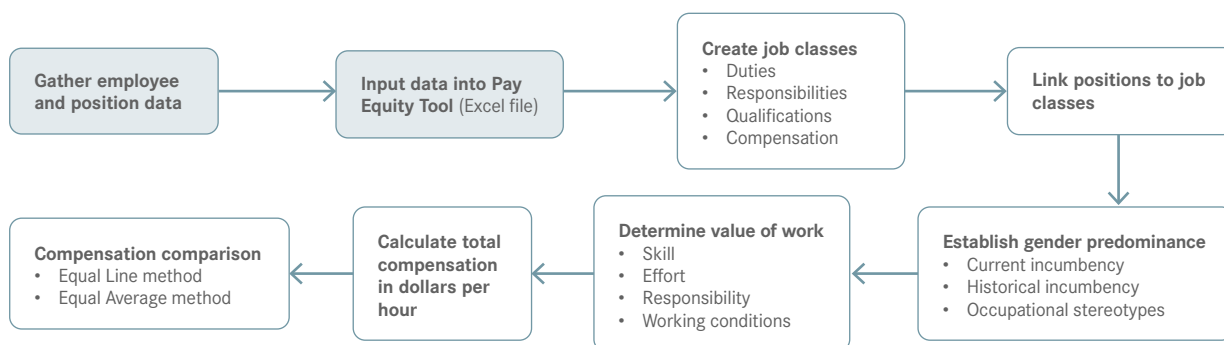


You will need the following information to create your pay equity plan:

- A list of all the positions in your organization, including vacant positions.
- A list of all employees who currently hold a position in your organization, identified by an employee ID number (identifier) assigned to ensure privacy. See the Interpretations, Policies and Guidelines (IPG) document entitled [Definition of Employee](#).
- The gender of each employee is male (M), female (F) or another gender (AG).
- The type and amount of base pay for each employee who holds a position.
- The types of direct and indirect compensation, in addition to base pay, that are associated with each position.
- Prior year annual earnings for employees in positions that are paid salary or hourly.
- Employees who are paid by commission, tips, kilometre rate, piece rate, etc., whose earnings should reflect a representative and appropriate period.
- Any ranges of salary that may exist.

Note: Depending on your HR system, you might be able to organize the required data according to the headings found in the Tool and upload your data instead of manually entering it. **Click [here](#) for instructions on how to upload your .csv file.**

Input Data into the Pay Equity Tool (Tab 1.1 Employee Data)



This is the section where you will be inputting your data into the Pay Equity Tool. It is an important step since the results of your pay equity plan will be based on this data. To input your employee data, you can:

- A) Upload your data into the Tool using a .csv file (click [here](#) for instructions);
- B) Type the information directly into the Tool fields.

Table 4

Position Title, Employee ID (Tab 1.1)

<div>Import csv file</div>								
No.	Position Title	Employee ID	Gender (M/F/AG/NA)	Type of Base Pay	Base Hourly Rate	Minimum Salary Range	Maximum Salary Range	Related Job Class

BEFORE USING THE TOOL

1. To ensure that you enter only employees who should be included in the count, refer to the IPG document entitled [Definition of Employee](#).

WITHIN THE TOOL

2. Go to the **Employee Data** tab (tab 1.1).
3. Click on the button at the top left-hand side of the page to import your employee data (see Table 4 above), or simply enter your data manually directly into the spreadsheet.
4. Use or assign an identifier in the Tool for each employee instead of their actual name to ensure privacy. This will be referred to as the Employee ID in the Tool. The cells in the row where you are entering data and the column where your cursor is turn green.
5. Enter the position title, employee ID number and gender for each employee under the

corresponding column (see Table 4). If you have a vacant position, indicate this under the **Employee ID** column by typing in “Vacant 1.” If you have more than one vacant position, number them accordingly, i.e., “Vacant 2”, “Vacant 3.” For vacant positions, select “N/A” from the drop-down menu in the **Gender** column.

Note: It is recommended that you enter position titles in a consistent manner to help with the organization of jobs later (e.g., Accountant, Senior; Accountant, Junior; Trucker, Local; Trucker, Long Haul).

6. In the same tab, go to the **Type of Base Pay** column and, from the drop-down menu, select how employees receive their base pay (e.g., salary, commission, etc.; see Table 5 below).
7. In the **Base Hourly Rate** column, input the amount of base pay associated with that position/employee, expressed as an hourly rate (see Table 5).

Your employer toolkit includes an Hourly Calculator to assist you with converting annual rates to hourly rates, if needed.

8. If there are established salary ranges for a position, input the lowest rate in the **Minimum Salary Range** column and the highest rate in the **Maximum Salary Range** column.

If there are no established salary ranges and the position is paid a regular annual or hourly salary, input the lowest base salary rate for the position in the **Minimum Salary Range** column and the highest rate in the **Maximum Salary Range** column (see Table 5).

For positions that have only a single rate, enter the same rate in both columns.

For positions that don’t receive a regular base salary (e.g., variable pay), you may choose to enter “0” in the salary fields.

9. **Do not complete** the last column called “Related Job Class”; this column will be completed later.

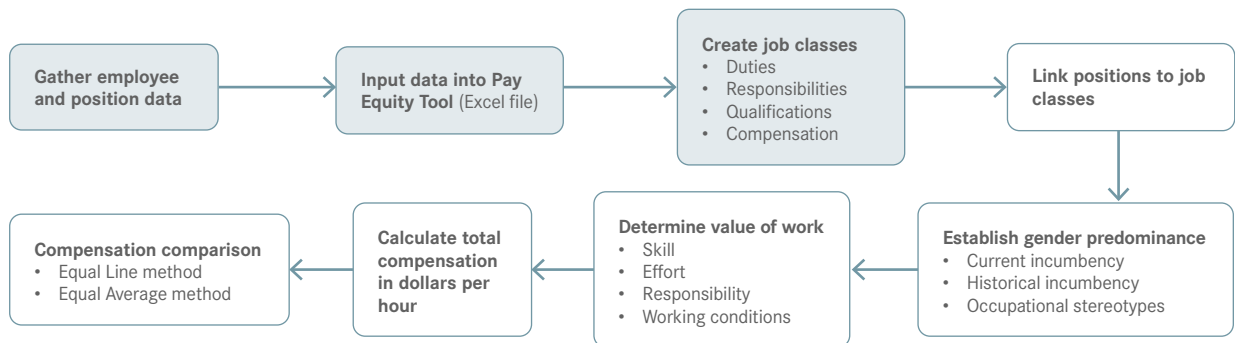
Note: If you have frozen rates of pay because no collective agreement is in place, please refer to the *Pay Equity Act Regulations* for guidance on how to input the base salary rate. You may also refer to the [Pay Equity Act Legislative Guide](#).

Table 5

Type of Base Pay, Base Hourly Rate, Minimum/Maximum Range of Salary (Tab 1.1)

Type of Base Pay	Base Hourly Rate	Minimum Salary Range	Maximum Salary Range	Related Job Class
Salary	\$31.00	\$30.98	\$36.36	Flight Attendant
Piece work pay	\$40.07	\$38.00	\$48.00	Instructor
Piece work pay	\$43.80	\$38.00	\$48.00	Instructor
Salary	\$24.75	\$24.00	\$27.00	Maintenance 1

Creating Job Classes (Tab 1.2 Establish Job Classes)



Job classes are the basic building blocks of pay equity. They represent categories or groups of positions that you create based on a set of characteristics outlined in the *Pay Equity Act*.

Job classes share the following characteristics:

- Positions have similar **duties and responsibilities**.
- Positions require similar **qualifications**.
- Positions are part of the same **compensation plan** (including the **range of salary**).

Most of the steps in this section will be completed outside of the Tool. The overall objective is to review existing positions in your organization to verify whether they meet the above criteria and determine whether they can be grouped into a job class. If a position does not share these characteristics with another position, it will be a job class on its own. If you have doubts about the similarity of positions, it is preferable to establish a distinct job class. If you wish to use existing job classes, they should be evaluated to assess whether they meet the criteria described above.

BEFORE USING THE TOOL

1. Review the duties, responsibilities, qualifications and compensation elements of your positions by looking at your job descriptions.
 - Useful information might include: job descriptions, prior job postings, and survey responses from employees.
 - You might need to update or create job descriptions.
2. Group together jobs with similar duties, responsibilities and qualifications.
3. Review the type of base pay and other compensation elements available for each position to ensure that your groupings meet the same criteria for those as well.
 - Use the sorting function at the top of the **Minimum Salary Range** and **Maximum Salary Range** columns in the **Employee Data** tab (Tab 1.1) to determine whether positions are within the same range of salary (see Table 6).
4. Assign a name to each job class.
 - Name your job classes in a manner that is suitable for your organization or use existing names (e.g., Administrative, Customer Service, Technical).

Table 6

Sorting Function for Range of Salary (Tab 1.1)

Minimum Salary Range	Maximum Salary Range
<div> <div>Sort Smallest to Largest</div> <div>Sort Largest to Smallest</div> <div>Sort by Color</div> <div>Clear Filter From "Maximum Salary Range"</div> <div>Filter by Color</div> <div>Number Filters</div> <div>Search</div> <div> <input checked="" type="checkbox"/> (Select All) <input checked="" type="checkbox"/> \$17.50 <input checked="" type="checkbox"/> \$18.00 <input checked="" type="checkbox"/> \$19.50 </div> </div>	
<div>OK</div> <div>Cancel</div>	

WITHIN THE TOOL

- The **Job Class worksheet** (Tab 1.3) will help you to verify that you have grouped positions into the appropriate job classes. This step is optional, but recommended (see Table 7).
 - If you enter “No” in one of the following yellow columns, a red bar will appear, prompting you to review how you have grouped your positions.

Table 7

Job Class Worksheet (Tab 1.3)

					Do the positions within each job class share the following criteria?				
No.	emplD	Position Title	Employee ID	Job Class	Similar Duties/Responsibilities (Review Job Descriptions)	Similar Skills/Qualifications (Review Job Descriptions)	Same Type of Base Pay Salary (Review employee data information)	Same Salary Range (Review employee data information)	Access to same Compensation Plan or Elements (Review User Guide)
1	1	Administrative Assistant- Accounting	E1000	Administrative 1	No				
2	44	Administrative Assistant- Commercial	E3000	Administrative 1					
3	11	Executive Assistant	E2000	Administrative 2					
4	16	CEO	E2050	CEO					
5	50	Manager Crew Scheduling	E1883	Crew Scheduling					
6	20	Customer Service Agent	CS0003	Customer Service Agents	Yes	Yes	Yes	Yes	Yes

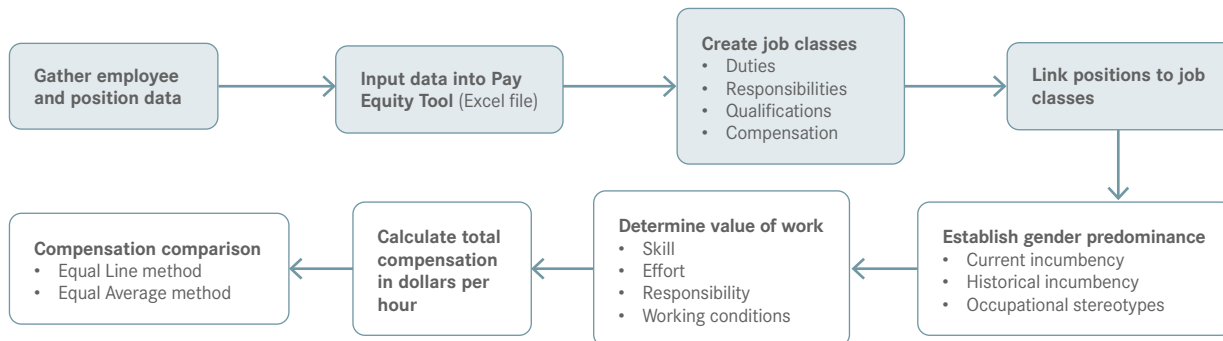
- Enter your job class names into Tab 1.2, **Establish Job Classes** (see Table 8).
- Each time you enter a job class, wait for the Tool to optimize and link that job class to Tab 1.1.**
- You can add or remove job classes as often as you need as you work on developing your plan.
 - The numbers in the **Employee/Position Count** column will be automatically populated based on how you have linked the job positions in the **Related Job Class** column (see **Linking Position to Job Classes** below) in the **Employee Data tab** (Tab 1.1).

Table 8

Inputting Your Job Classes (Tab 1.2)

No.	Job Class	Employee/ Position Count
1	Administrative 1	2
2	Administrative 2	1
3	CEO	1
4	Crew Scheduling	1
5	Customer Service Agents	3
6	Dispatch	1

Linking Positions to Job Classes (Tab 1.1 Employee Data)



WITHIN THE TOOL

1. The last step is linking each position listed in your **Employee Data** tab to a job class. Go back to your **Employee Data** tab (Tab 1.1) and scroll over to the **Related Job Class** column.
2. Use the drop-down menu to select the appropriate job class for each of your positions (see Table 9). The Tool will automatically offer you the job classes that you created in the previous step.

Note: To remove a job class, first go to Tab 1.1 (**Employee Data**) and unlink any positions that are linked to it. Then, relink the position(s) to an existing job class, or if they no longer exist, remove the position data. Once you have completed these steps, you can move to Tab 1.2 and remove the job class name from the list. **If you attempt to remove the job class name from Tab 1.2 without doing these steps first, you will get a warning that doing so will remove ALL the information you have associated with that job class (including the linked positions).**

Table 9

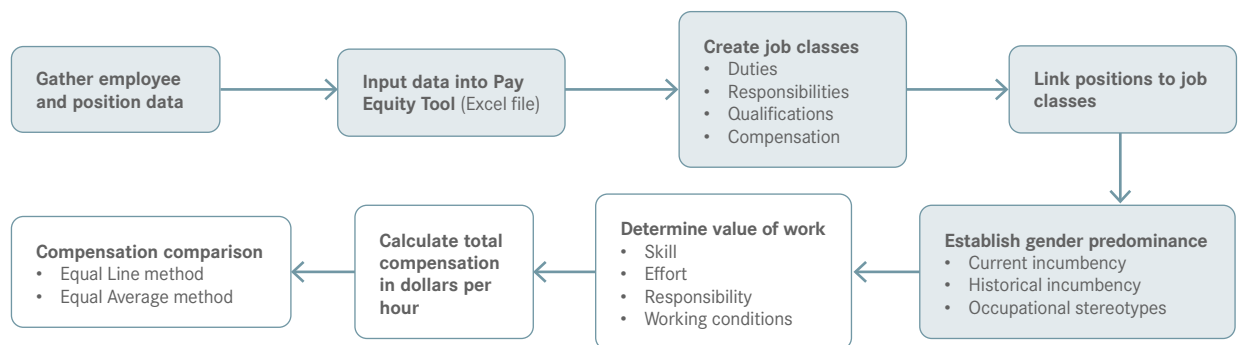
Linking Positions to Job Classes (Tab 1.1)

[Import csv file](#)

No.	Position Title	Employee ID	Gender (M/F/AG/NA)	Type of Base Pay	Base Hourly Rate	Minimum Salary Range	Maximum Salary Range	Related Job Class

Step 2: Determining which job classes are predominantly female and which ones are predominantly male

Gender Predominance of Job Classes (Tab 2 Gender Predominance)



The purpose of the *Pay Equity Act* is to address gaps in pay between men and women for work of equal value. To meet the requirements of the Act, you need to assess any gender predominance in the job classes linked to the positions that were created in Step 1. Job classes can be classified as predominately female, predominately male or gender neutral. To do this, you will review the following elements:

1. Current incumbency (each position at the time of entering your data into the Tool)
2. Historical incumbency (employees who have predominately occupied this Job Class in the past)
3. Gender-based occupational stereotyping

Once these three factors have been considered, you will make a final decision on the gender predominance of each job class you have listed in the tool. Only female and male job classes are part of the pay equity process.

Consult the Interpretations, Policies and Guidelines under “[Determining the female or male predominance of a job class in an inclusive manner](#)” for more information.

Note: If you don’t have any gender information/data for your current positions, you will need to obtain this information.

BEFORE USING THE TOOL

1. Review your records over the past few years to determine the historical incumbency for each position.
 - The number of years you choose to analyze will depend on how far back your records go.
 - Historical gender predominance is measured by determining whether at least 60% of employees within a job class were of the same gender (male or female).
2. Determine the gender-based occupational stereotypes by reviewing male and female positions within each job class. Traditionally, some types of jobs were seen as “women’s work” or “men’s work.” These occupational gender stereotypes reflect traditional roles that men and women occupied in society. It is also worth considering whether the actual features and duties of the job were seen as more suited to women or men.
 - For example, the position of nurse is generally held by females, while the position of mechanic is generally held by males¹.

WITHIN THE TOOL

3. Go to Tab 2, **Gender Predominance** (see Table 10). The Tool has generated the current gender predominance for each one of your job classes:
 - Predominately female (60% or more of employees in the job class are women), or
 - Predominately male (60% or more of employees in the job class are men), or
 - Gender neutral (more or less equal number of women and men holding the position).
4. Populate the columns with a yellow/orange background (**Historical Incumbency**, **Occupational Stereotypes**, **Decision** and **Rationale**). If positions are vacant, you will have to make your decision on gender predominance based on the historical incumbency and gender stereotypes.
 - **Historical Incumbency**
 - Fill in the **Historical Incumbency** column by selecting one of the options from the menu.
 - **Occupational Stereotypes**
 - Fill in the **Occupational Stereotypes** column by selecting one of the options from the menu.
 - **Decision**
 - Enter your final gender decision in the **Decision** column by using the drop-down menu. This column is shaded in orange and will turn to yellow when you input a decision.
 - Ensure you have entered a decision for each job class (i.e., all cells in the **Decision** column are yellow).

1. Source: Statistics Canada, graduation rates for certain professions (e.g., engineers), association data on gender mix by positions

- **Rationale**
 - You can explain your choice in the last column, **Rationale** (see Table 10). We recommend that you include your rationale to assist you if you are challenged in your decision, but it is optional.
- **Review your decisions**

Depending on the results of your decisions, your next steps in the process may vary.

- If you have both male- and female-predominant job classes, you can proceed to Step 3.
- If there are no female-predominant job classes in your plan, you can complete your draft pay equity plan without using the Tool.
- If there are no male-predominant job classes in your plan, you need to develop a male comparator that you can use. (See the section below on situations with no male comparators.)

Table 10
Gender Predominance (Tab 2)

No.	Job Class	Number Females	Number Males	Number Another Gender	Current Female Gender Predominance (%)	Current Gender predominance	Historical incumbency	Occupational stereotypes	Decision	Rationale
4	Crew Scheduling	0	1	0	0%	M	M	NA	M	Committee decision
5	Customer Service Agents	2	0	1	100%	F	F	F	F	All indicators are Female
6	Dispatch	0	1	0	0%	M	M	NA	M	All indicators are Male
7	Driver	0	1	0	0%	M	M	M	M	All indicators are Male

No Male Comparator in Your Pay Equity Plan

If you do not have any male-predominant job classes in your pay equity plan, you must develop a male job class against which you can compare the female-predominant job classes. Male job classes may be developed using the Other Employer Method or the Fictional Job Class Method, but only the Other Employer Method is available within the Tool. This method involves choosing male job classes from another employer and using them for comparison purposes.

BEFORE USING THE TOOL

1. Identify an employer that has the following characteristics in common with your workplace:
 - Part of the same industry
 - Operating in a region with a similar cost of living
 - Similar number of employees, proportion of unionized employees and compensation practices
2. Approach the employer and confirm whether they would be willing to share information on their job classes to help you create the other employer job class.
3. You will need the following job class information from the employer:
 - At least three job classes that are predominantly male
 - Calculated compensation for selected job classes

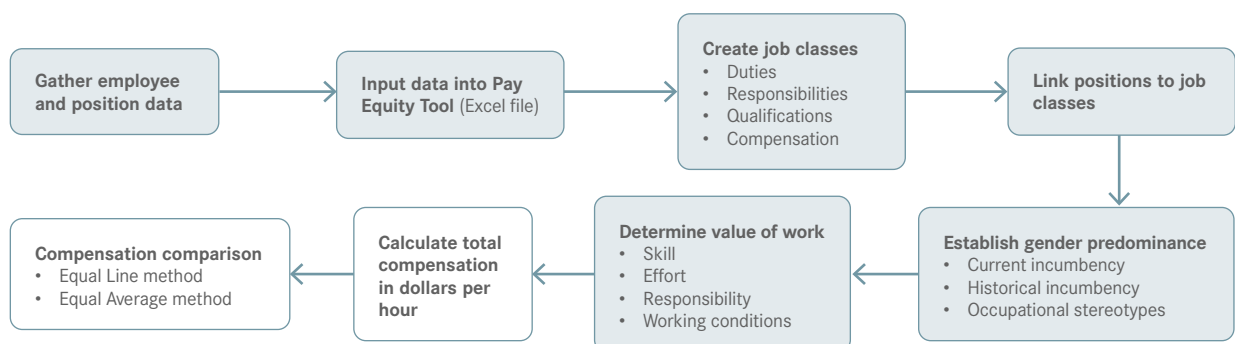
- Job classes that are representative of the range of values of work for all the gender-predominant job classes
 - Sufficient information to value the work of those job classes as though they were in your workplace
 - The highest salary in the range for positions in the chosen job classes
4. Next, create male job classes whose work can be valued as though the positions were in your workplace and as though you were paying their salary.

Note: All information received from the other employer can be used only for the purposes of developing your plan and must be kept confidential by all parties involved.

WITHIN THE TOOL

5. Now that you have established your male comparator job class, you will need to go back to the **Establish Job Classes** tab (Tab 1.2) to enter your new male job class comparator title, e.g., Other employer job class 1, Other employer job class 2.
- Next, return to the **Employee Data** tab (Tab 1.1) and enter the name of your comparator job class as the position title. Create a fictitious employee ID and complete the remaining details related to this comparator job class within the tab, including linking this position to the job class name that you created.
6. Return to the **Gender Predominance** tab (Tab 2).
- The **Current Gender Predominance** column will indicate “Male” for your male comparator job class.
 - Enter N/A in the **Historical Incumbency** and **Occupational Stereotypes** columns of your male comparator job class.
 - Enter “Male” in the **Decision** column.
 - In the **Rationale** column, indicate that this is a male comparator job class (e.g., Male comparator for Other Employer Method 1).
7. Work your way through the tabs for Steps 3 and 4, but for the male comparator job class.

Step 3: Valuing the work done in each of these job classes



In this step of your pay equity plan, you must determine the relative value of work in your organization for each male-predominant or female-predominant job class. This step is not required for job classes that are gender neutral. The value of work is determined for the full range of positions in a job class (or one position if the job class includes only one position).

To determine the value of work for a job class, use information about the job descriptions within that job class to evaluate the presence of four key factors in each job class:

- Skill
- Responsibility
- Effort
- Working conditions

Entering complete job information is essential for accurate job evaluation results. The information gathered in Step 1 to establish job classes will assist you for this.

Evaluate Job Classes in the Tool

The job evaluation method used within the Tool is called the point factor method and is the most used method for valuing work for pay equity purposes.

- The point factor method looks at skill, effort, responsibility and working conditions, and then further divides each factor into sub-factors (e.g., knowledge and communications).
- The factors and sub-factors are assigned a weighting value based on their importance in your organization.
- The sub-factors are divided into levels, which are then assigned points.
- Job classes are rated (evaluated) to obtain a total point score.

To use the point factor evaluation method within the Tool, follow the steps outlined below. If you are selecting an alternate evaluation method or have predetermined values of work for job classes that were arrived at using a gender-neutral method, you will no longer be able to use the Tool.

Select Factor and Sub-Factor Weightings

In this step, you will decide on the weightings for your factors and sub-factors. The weightings you select should be determined based on the importance of various factors and sub-factors in your organization. Although there is some flexibility, you will notice that the weightings must be within a specified range that has been established based on research on effective weight ranges for each factor.

BEFORE USING THE TOOL

1. In the **Weight Factors** tab (Tab 3.1), review the range (Min/Max) of possible weightings for the four factors (skill, effort, responsibility, working conditions) and decide on a weighting that reflects the relative importance of the factors in your work environment.
 - It is important that you do not undervalue factors that are associated with female-predominant jobs by applying a low weighting.

- The weighting percentages you select will apply to all positions across all job classes (you cannot have different weightings for different job classes).
- Weightings can dramatically change the final evaluation outcome and should therefore be chosen thoughtfully and carefully.

WITHIN THE TOOL

2. In the **Weight Factors** tab (Tab 3.1), input the weighting that you have selected for each factor above.
 - The weighting of the four factors must add up to exactly 100%. If you see a red bar, this indicates that your total either exceeds or is less than 100% (see Table 11).
 - The weighting you have selected for each factor will also automatically appear in the greyed-out area of the box below along with the total points available for that factor (see Table 12).
3. You will notice that each factor is broken down into sub-factors (see Table 12). In the yellow column labelled “Percentage”, decide on and enter a weight for each sub-factor within the established range.
 - The sub-factor total must add up to the number in the grey box, which is the overall factor weighting. A red bar indicates that your sub-factor weighting is wrong (see Table 13).
 - Once you have assigned weightings for each sub-factor, the Tool will allocate points to each level* that is available for evaluation within that sub-factor.

* The Tool distributes points based on the total points available, the number of levels available, and the weight that you assigned to each sub-factor.

Table 11

Incorrect Factor Weighting (Tab 3.1)

Enter your Factor Rating first

Factors	Min(%)	Max(%)	Factor %
Skills	20%	35%	26%
Effort	15%	25%	24%
Responsibility	25%	35%	30%
Work Conditions	10%	30%	24%

Table 12

List of Sub-Factor Weightings (Tab 3.1)

Factor/Sub-factor	%	Total Points	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6
Skills (20 - 35%)	26%	260						
Knowledge	8%	80	16	32	48	64	80	
Communication/ Interpersonal Skills	9%	90	18	36	54	72	90	
Problem Solving/Judgment	9%	90	15	30	45	60	75	90
<i>Current weighting total</i>	26%							

Table 13

Incorrect Sub-Factor Weighting (Tab 3.1)

Factor/Sub-factor	%	Total Points	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6
Skills (20 - 35%)	26%	260						
Knowledge	8%	80	16	32	48	64	80	
Communication/ Interpersonal Skills	10%	100	20	40	60	80	100	
Problem Solving/Judgment	9%	90	15	30	45	60	75	90
<i>Current weighting total</i>	<i>27%</i>							

Evaluate Job Classes

Job classes are evaluated by measuring the presence of sub-factors one-by-one and assigning the appropriate level to each.

Table 14

Job Evaluation Definitions by Factor and Sub-Factor (Tab 3.2)

Select Factors		
All		
<i>Subfactors and Level Definitions by Factor</i>		
SKILLS	Label	Points
Knowledge: Level of knowledge required to meet the job demands, such as the level of information, facts and skills. The knowledge can be obtained through any combination of formal education, training, and work and life experience.		
1. Little or no previous job knowledge or experience required, and/or on- the job training of less than 2 months.	SK1	16
2. Three months to one year of work-related experience or a specific training certificate is required; or, the job requires longer on the job training periods to understand needs processes or equipment specific to the job.	SK2	32
3. Moderate knowledge is required to meet job requirements. This knowledge is usually obtained through post-secondary level of education or equivalent work experience related to the required knowledge of the job.	SK3	48

WITHIN THE TOOL

1. Go to the **Job Evaluation Definitions** tab (Tab 3.2) to see a list of level definitions for each sub factor. You can view all the definitions together or select the ones you wish to view in the drop-down menu (see Table 14). The definitions are also available in the job evaluation guide.
2. Go to the **Evaluate Job Classes** tab (Tab 3.3; see Table 15). You will see a list of your male- and female-predominant job classes (any neutral job classes will be hidden).
3. Evaluate each job class listed by selecting a level for each sub-factor (e.g., SK1, SK2, SK3, etc.) that is most reflective of the work described in that job class. To do this, locate the job class that you are ready to evaluate. Scroll over to the first sub-factor, “Knowledge,” and enter the level definition you have selected by clicking on the drop-down arrow under “Knowledge.”
 - Once you select a level, the corresponding definition will appear in a box at the top labelled “Selected level definitions.” This allows you to verify that the definition matches the level that you wish to assign to the job class.

4. Continue until you have decided on levels for every sub-factor for all your job classes.
 - As you are evaluating and assigning levels, the Tool is calculating the total points. The row will remain red until you have completed the evaluation (selected a level for every sub factor).
 - Once you have completed your evaluations, the tool will generate a total score for each job class (see Table 15).

Note: We recommend that you take good notes on your evaluations (i.e., on the reasoning behind your selected sub-factor levels) since they could potentially be challenged.

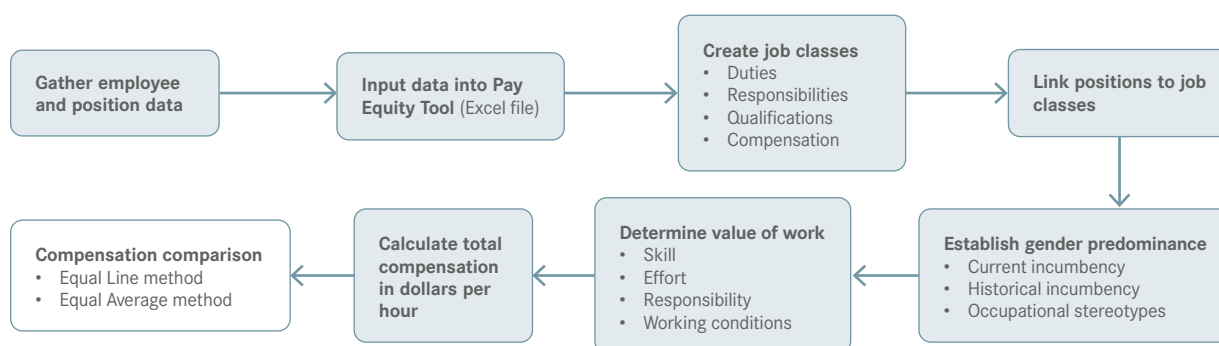
Table 15
Total Scores for Job Classes (Tab 3.3)

No.		Job Classes		SKILLS			EFFORT		RESPONSIBILITY			WORK CONDITIONS		Total Points
				Knowledge	Communication/ Interpersonal	Problem Solving	Motor Effort	Cognitive/ Intellectual Effort	Impact of Action	Coordination of Others	Risk Management	Physical Environment	Psychological Environment	

Review the Results

Now that you have evaluated all job classes, review the total score assigned to each one to check for inconsistencies. Ensure that job classes with the same or similar scores do perform work of similar complexity. You may resolve issues that stand out by reviewing your job evaluation as well as your notes and by adjusting levels, as required.

Step 4: Calculating total compensation in dollars per hour



In this step of your pay equity plan, you will calculate the hourly value of all compensation available to each job class. Gender-neutral job classes do not require this analysis.

Review Total Compensation Elements

At this point, you will review the compensation elements that are available to positions in your organization. For this purpose, you will need to gather data on the value of all compensation elements for each female- or male-predominant job class.

Calculate Total Compensation Values by Job Class

In this section, you will be inputting information on the value of compensation elements that are offered by your organization, but that are not considered to be section 45² exclusions (compensation that is equally available to all job classes). If any compensation element is equally available to all job classes, you do not have to include it in your calculations.

To calculate the value of compensation elements, you have the option of either using the **Compensation Worksheet** (Tab 4.2) in the Tool or doing your calculations outside of the Tool and then inputting them manually. One of the benefits of using the **Compensation Worksheet** is that the values carry over to populate the white numerical fields in the **Calculate Compensation** tab (Tab 4.1), which in turn saves time and improves accuracy.

BEFORE USING THE TOOL

1. Collect any available information/data on the value of all compensation elements offered by your organization for male- and female-predominant job classes.
2. Exclude any elements that are equally accessible to all job classes (section 45 exclusions).
 - All compensation elements must be shown in hourly rates, so you might need to convert values if they are not already expressed as such (e.g., convert an annual bonus amount to an hourly rate).

WITHIN THE TOOL

3. To use the **Compensation worksheet** to populate Tab 4.1, **move to Tab 4.2**. Click on the drop-down below the instruction in blue that reads “Select Job Class” (see Table 16). The drop-down menu lists all the job classes that you created.

Choose a job class from the drop-down menu list.

- You will complete one sheet for each job class. The worksheets can be filled out in any order.
- The Tool has automatically populated the **Job Class**, **Gender Predominance** and **Maximum Hourly Rate** columns in white (see Table 16).

2. Section 45 stipulates that “An employer – or, if a pay equity committee has been established, that committee – may exclude from the calculation of compensation, with respect to each job class in respect of which compensation is required to be calculated, any form of compensation that is equally available, and provided without discrimination on the basis of gender, in respect of all of those job classes.”

Table 16

Selecting a Job Class (Tab 4.2)

Select Job Class

Dispatch	▼
----------	---

Calculate Compensation

Any compensation element that is equally available at the same level to all positions does not have to be included in your calculations	
Job Class	Dispatch
Gender Predominance	M
Maximum Hourly Rate	22.00

4. In the **Compensation worksheet** (Tab 4.2), input the hourly values for the types of compensation associated with that job class (see Table 17).
- If the element is not offered and has a value of zero, you don't need to re-enter "0" (zero).
 - If your organization offers an element that is not listed, you can use the "Other" field in yellow to type in the name of that compensation element.

Table 17

Compensation Worksheet (Tab 4.2)

Select Job Class

Dispatch	▼
----------	---

Calculate Compensation

Any compensation element that is equally available at the same level to all positions does not have to be included in your calculations	
Job Class	Dispatch
Gender Predominance	M
Maximum Hourly Rate	22.00

Other Types of Compensation	Hourly Value	Note
Flexible compensation		
Commission above base pay rate	\$0.00	
Tips	\$0.00	
Piece work above base pay rate	\$0.00	
Individual Bonus	\$0.50	Service standard bonus
Group or Corporate Bonus	\$0.00	
Recognition Awards	\$0.00	
Other (user defined)	\$0.00	

5. Complete the fields under Section 46 Exclusions (to subtract) and Section 46 Differences (to add) if you have any (see Tables 18 and 19).
- These values will also be automatically totalled and moved to the **Calculate Compensation** tab (Tab 4.1).
 - The Tool will automatically save the information you have entered for each job class.
 - There is also a column where you can note rationales for your section 46 additions/exclusions in the **Calculate Compensation** tab (Tab 4.1). Rationales are required as part of posting your pay equity plan.

Table 18

Section 46 Exclusions (Tab 4.2)

Section 46 Exclusions (to subtract)	
Seniority based compensation	\$0.00
Reclassification allowance	\$0.00
Skill Shortage Premium	\$0.00
Geographic allowance	\$0.00
Merit based compensation	\$0.00
Overtime	\$0.00
Shift work premium	\$0.00
On call/Call back	\$0.00
Travelling allowance/pay	\$0.00
Other Temporary Allowance(s)	\$0.00
Total Value	\$0.00

Table 19

Section 46 Additions (Tab 4.2)

Section 46 Differences (to add)	
Difference due to employee training program	\$0.00
Difference due to employee development rate	\$0.00
Benefits in lieu due to temporary, casual or seasonal	\$0.00
Total Value	\$0.00

Table 20

Hourly Values of Other Compensation Elements and Section 46 Additions/Exclusions (Tab 4.1)

Canadian
human rights
commissionCommission
canadienne des
droits de la personne

Pay Equity Plan Tool

Step 4: Calculate the total compensation in dollars
per hour for each of these job classes

Manual Entry

No.	Job Class	Gender	Maximum Base Hourly Rate	Hourly Value of Other Compensation Elements	Total Hourly Compensation	Hourly Value of Section 46 Exclusions	Hourly Value of Section 46 Additions	Exclusion Rationale	Adjusted Total Hourly Compensation
1	Administrative Assistant	F	\$21.77	\$0.00	\$21.77	\$0.00	\$0.00		\$21.77
2	Customer Service	F	\$18.00	\$0.00	\$18.00	\$0.00	\$0.00		\$18.00
3	Director	M	\$61.34	\$0.00	\$61.34	\$0.00	\$0.00		\$61.34
4	Engineer	M	\$44.13	\$0.00	\$44.13	\$0.00	\$0.00		\$44.13
5	Flight Instructor	M	\$48.00	\$0.00	\$48.00	\$0.00	\$0.00		\$48.00
6	Pilot	M	\$54.00	\$0.00	\$54.00	\$0.00	\$0.00		\$54.00
7	Travel Planner	F	\$35.00	\$0.00	\$35.00	\$0.00	\$0.00		\$35.00

6. If you don't use the **Compensation Worksheet** (Tab 4.2), you will manually input your data into the **Calculate Compensation** tab (Tab 4.1); see Table 20.

- Input the total hourly value of all compensation provided for the job class, in addition to the base rate, into the **Hourly Value of Other Compensation Elements** column.
- Input the total hourly value of any section 46 exclusions into the **Hourly Value of Section 46 Exclusions** column. Write a rationale under the **Rationale** column. The rationale for exclusions is important because it will appear on your final summary template in Step 6, which you can use to fulfill the posting requirements for your pay equity plan.

- Input the total hourly value of any section 46 additions in the **Hourly Value of Section 46 Additions** column.
- The Tool will now calculate the **Adjusted Total Hourly Compensation** column.

Note: If you use the **Compensation Worksheet** (Tab 4.2) and then decide to manually input your data, click on the **Manual Entry** button (see Table 21) in Tab 4.1 to reset the worksheet to manual entry mode. Any information that you had entered will not be removed and will still be saved in Tab 4.2.

Table 21

Manual Entry and Linked Numbers (Tab 4.1)



Commission
canadienne des
droits de la personne

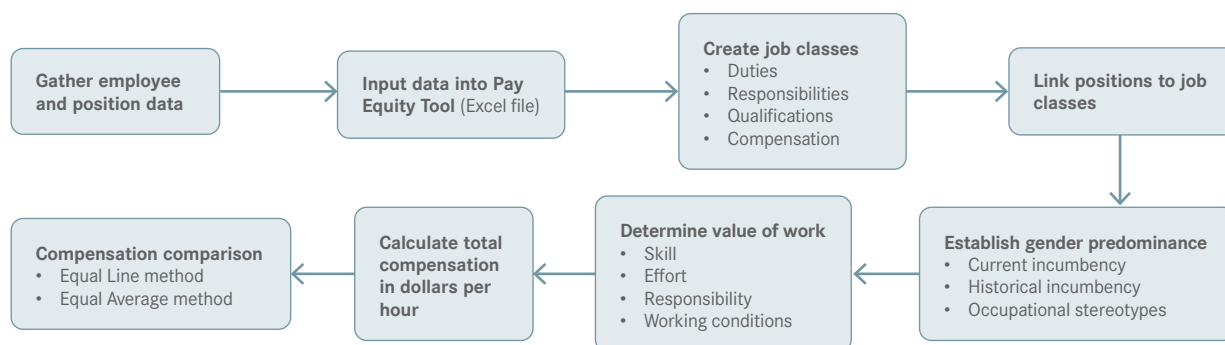
Pay Equity Plan Tool

Step 4: Calculate the total compensation in dollars per hour for each of these job classes

Manual Entry

No.	Job Class	Gender	Maximum Base Hourly Rate	Hourly Value of Other Compensation Elements
1	Administrative Assistant	F	\$21.77	\$0.00
2	Customer Service	F	\$18.00	\$0.00
3	Director	M	\$61.34	\$0.00
4	Engineer	M	\$44.13	\$0.00
5	Flight Instructor	M	\$48.00	\$0.00
6	Pilot	M	\$54.00	\$0.00
7	Travel Planner	F	\$35.00	\$0.00

Step 5: Comparing compensation to determine whether there are any differences in compensation between job classes of equal value



Total compensation values were determined for female- and male-predominant job classes in [Step 4](#). This step will identify any gaps between job classes of the same value. If you find compensation gaps to the detriment of female-predominant job classes, you will need to correct them for all employees in those job classes.

While there are various options for comparing compensation under the Act (equal average, equal line or “other”), the Tool provides only the option to use the equal average method, which is outlined below.

Establish Point Bands

A band is a range of values of work that the employer or pay equity committee considers comparable. In this step, job classes must be grouped into job evaluation point bands that reflect the intervals or ranges that are considered of equivalent value to the organization.

WITHIN THE TOOL

1. In Tab 5.1, move to the Band Information box at the top (see Table 22). You will see a drop-down arrow next to Band Type. Use the arrow to select Equal Distance if your band intervals are an equal distance apart (e.g., each band spans 100 points) or select Manual Entry if you are setting up your bands with intervals that are not equally distanced (e.g., the band intervals may be progressive from narrow point intervals to large ones).
2. A) If you have selected the **Equal Distance** method
 - The Minimum Job Class Point Value cell shows you the lowest score from the job evaluations you have completed. This value will assist you when establishing your starting point for your bands.
 - Next, input the number of points you wish to use as a starting point for your bands in cell E8.
 - Next to Band Increments (cell E9), enter the distance in points between each band, e.g., 50 points between each band (see Table 22).
 - The Tool will populate the Maximum Job Class Point Value field (see Table 22).
 - The Tool will also populate all the remaining unpopulated white fields (see Table 23).

Table 22
Band Information (Tab 5.1)

Band Information:

Band Type	Equal Distance
Min Job Class Point Value	Equal Distance
Band Starting Point	Manual Entry
Band Increments	250
	60
Max Job Class Point Value	856

B) If you have selected the **Manual Entry** method

- Once you have selected Manual Entry from the drop-down menu, a worksheet will open under a tab called **Manual Bands Entry**.
- The Min Job Class Point Value cell shows you the lowest score from the job evaluations you have completed. This value will assist you when establishing your starting point for your bands.
- In the Manual Bands Entry tab, fill out the Band Starting Point field (row 8).
- Enter your desired job evaluation point values in the **Band Minimum** and **Band Maximum** columns. Make sure to save your data if your file is not on auto-save.
- Bands cannot overlap. If they do, you will get an error message. Based on the point ranges that you have assigned to your bands, the Tool will populate all the white fields in the Band Chart (see Table 23).
- The Tool has placed each of your job classes into the appropriate band according to their job evaluation score.

Table 23

Establish Bands Chart (Tab 5.1)

No.	Job Class	Gender Predominance	Job class Point Value	Band Minimum	Band Maximum	Assigned Band	Position Count	Adjusted Total Hourly Compensation Value
	Receptionist	F	251	250	309	1	1	\$17.50
	Administrative 1	F	357	310	369	2	2	\$26.42
	Driver	M	328	310	369	2	1	\$24.16
	Dispatch	M	377	370	429	3	1	\$27.43
	Customer Service Agents	F	417	370	429	3	3	\$19.37

Verify Your Male Comparator Job Class

WITHIN THE TOOL

- Go to the **Comparison Results** tab (Tab 5.2). Looking at the Bands Summary table (see Table 24), check the Male Job Class Count column for each band to ensure that you have at least one male comparator job class in each band where you have a female-predominant job class. In the Table 24 example below, there is no male job class in band 4.
 - If you have male comparators for all your bands, you can move on to step 5.3 below.

Table 24

Example of Band 4 with No Male Comparator (Tab 5.2)

BANDS SUMMARY								
Band	Band Minimum	Band Maximum	Female Job Class Count	Male Job Class Count	Male Average Hourly Compensation	Female Average Hourly Compensation	Eligible for Adjustment?	Male Average Compensation Source
1	225	259	1	1	\$19.50	\$17.50	Yes	This Band
2	260	294	0	0		-	No	
3	295	329	0	1	\$24.16		No	This Band
4	330	364	1	0	\$24.94	\$26.42	No	Bands 3 + 5
5	365	399	0	2	\$25.72	-	No	This Band
6	400	434	2	1	\$29.52	\$26.35	Yes	This Band

If you do not have a male comparator job class in a band, the Tool will calculate a male average hourly compensation value. If there is at least one male comparator available in your pay equity plan data, this comparator needs to be used.

Determine Male and Female Compensation Averages

Tab 5.2 provides a summary of your bands and illustrates the male and female average hourly compensation in each band. The **Eligible for Adjustment?** column indicates whether a female-predominant job class is eligible for an increase based on the comparison of the average female hourly compensation in a band with the male average hourly compensation in the same band (see Table 25).

Table 25

Band Summary (Tab 5.2)

BANDS SUMMARY								
Band	Band Minimum	Band Maximum	Female Job Class Count	Male Job Class Count	Male Average Hourly Compensation	Female Average Hourly Compensation	Eligible for Adjustment?	Male Average Compensation Source
1	225	279	1	1	\$19.50	\$17.50	Yes	This Band
2	280	334	0	1	\$24.16	-	No	This Band
3	335	389	1	2	\$25.72	\$26.42	No	This Band
4	390	444	2	1	\$29.52	\$26.35	Yes	This Band
5	445	499	1	1	\$34.08	\$28.34	Yes	This Band
6	500	554	1	1	\$36.00	\$49.00	No	This Band

Calculate Compensation Increases Owing

The Tool calculates any compensation increases owing in the Female Job Classes Summary chart (see Table 26) within the **Comparison Results** tab (Tab 5.2). The chart includes the following information:

- The factor calculated according to the formula found in the *Pay Equity Act Regulations* (**Factor**).
- The **Adjustment Status**, i.e., whether an adjustment is owed or not.
- The **Adjusted Hourly Compensation Value**.
- Any amount owing expressed as an hourly rate (**Total Hourly Compensation Value [current]**).
- Any amount owing expressed as a percentage of the current female average hourly compensation (**Adjustment % Increase**).

Table 26

Compensation Adjustment (Tab 5.2)

FEMALE JOB CLASSES SUMMARY									
Job Class Name	Band	Job Value (points)	Total Hourly Compensation Value (Current)	Adjustment Factor	Adjustment Status	Adjustment \$ Increase	Adjustment % Increase	Adjusted Hourly Compensation Value	Position Count
Administrative 1	3	357	\$26.42	0.00	No Adjustment	N/A	N/A	N/A	2
Administrative 2	4	429	\$30.00	0.00	No Adjustment	N/A	N/A	N/A	1
Customer Service Agents	4	417	\$22.69	0.93	Yes	\$6.35	27.99%	29.04	3
Finance Associate	5	452	\$28.34	1.00	Yes	\$5.74	20.25%	34.08	3
Flight Attendant	7	596	\$36.36	1.00	Yes	\$1.09	3.00%	37.45	6
Instructor	11	777	\$57.32	1.00	Yes	\$5.68	9.91%	63.00	2
Manager	6	545	\$49.00	0.00	No Adjustment	N/A	N/A	N/A	2

The **Comparison Summary** tab (Tab 5.3) shows all compensation increases owing for the organization (see Table 27).

Table 27

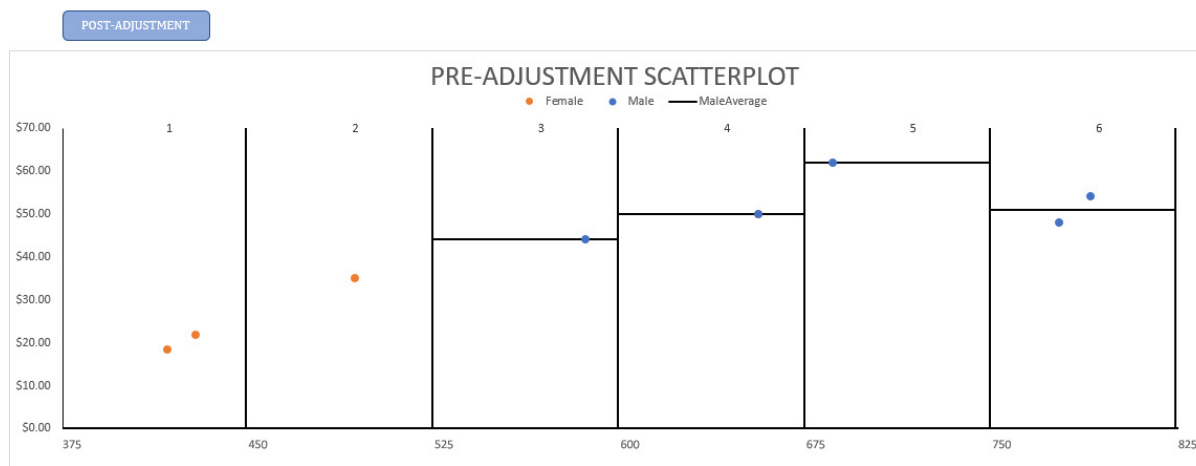
Comparison Summary (Tab 5.3)

RESULTS SUMMARY		
Total Increase to Wages	% Increase to Wages	13.26%
	Avg adjustment	\$3.89
Employees Receiving Adjustment	# of Positions receiving adjustment	17
	% of Total Population	33.33%
Demographics	# of Job classes getting an increase	6
	Bands getting increase	5
	Largest Gap/Smallest Gap	\$6.35/\$1.09

You can also view the results of your compensation comparison in a scatter plot graph both before (pre-adjustment) and after (post-adjustment) the calculated increases. If you are viewing the pre-adjustment scatter plot, you will see a blue **Post-Adjustment** button above it that you can click on to see the post-adjustment graph (see Table 28).

Table 28

Scatter Plot Graph (Tab 5.3)



IMPORTANT NOTE: You will need to save your file with different names for record keeping and audit purposes (e.g., Pay Equity Data 2020-21_Draft Plan, Pay Equity Data 2020-21_Final Plan).

Step 6: Preparing the contents of the pay equity plan

The next step is uploading your Pay Equity Tool data into the pay equity plan template. This template organizes the information that you have entered in the Pay Equity Tool in a way that meets the requirements of section 51 of the Act. The template can be printed and used for posting purposes.

To upload your Pay Equity Tool data into the pay equity plan template:

- Ensure that macros are enabled in Microsoft Word.
 - In Microsoft Word, go to File – Options – Trust Center – Trust Center Settings – Enable all macros.
- Open the pay equity plan template (Pay equity plan template.docm).
- A dialog box will open. Select your pay equity tool.
- The document will upload the information from the Pay Equity Tool into the draft pay equity plan.

Preparing Your Pay Equity Plan

Once you have uploaded your Pay Equity Tool data into the pay equity plan template, review the plan document closely to make sure that your information is accurate. You must fill out any sections that were not auto-filled with sections information from the Pay Equity Tool.

Plan Contents

A) Employer Information Chart

- This chart provides an overview of the employer organization as required under paragraphs 51(a), (b) and (c) of the Act, including the name and size of the organization, the number of pay equity plans being established by that employer, and whether a pay equity committee was involved in the creation of the pay equity plan.

Data to enter

- If the plan has been developed for a group of employers, prepare a list of all the employers and attach it to the Plan.
- Select the box that applies to your organization, depending on whether the pay equity committee meets the requirements of the Act or if you have received permission to establish a pay equity committee with different requirements (see Table 29).

Table 29
Summary Template

Is this a Group of Employers?: No	
<i>If Yes, see the appendix for a list of employers</i>	
Number of Pay Equity Plans: Missing	
Pay Equity Plan Name: Missing	
Employee Count: 50	
Was a Pay Equity Committee established? Missing	
If Yes:	
<input type="checkbox"/> The Pay Equity Committee meets the requirements under s. 19(1) of the Act	
<input type="checkbox"/> We received authorization to establish a Pay equity Committee with different requirements	
Posting Date:	April 11, 2022

Section 1: Objectives of the *Pay Equity Act*

- States the purpose of the *Pay Equity Act* and the pay equity process.

Section 2: Employer Obligations in Creating a Pay Equity Plan

- States employers' obligations in creating a pay equity plan within three years of becoming subject to the *Pay Equity Act*.

Section 3: List of Job Classes

- A list of all job classes within the organization is pulled from Step 1.2 of the Pay Equity Tool and is required in the plan under paragraph 51(1)(d) of the *Pay Equity Act*.

Section 4: Female-Predominant Job Classes

- A list of all female-predominant job classes within the organization is pulled from Step 2 of the Pay Equity Tool and is required in the plan under paragraph 51(1)(e) of the *Pay Equity Act*.

Section 5: Male-Predominant Job Classes

- A list of all male-predominant job classes within the organization is pulled from Step 2 of the Pay Equity Tool and is required in the plan under paragraph 51(1)(f) of the *Pay Equity Act*.

Section 6: Job Evaluation Method and Results

- This section confirms that the point factor method was used for the job evaluation and provides a chart with the results of the job evaluation. This information is pulled from Step 3.3 of the Pay Equity Tool and is required in the plan under paragraph 51(1)(h) of the *Pay Equity Act*.

Section 7: Calculating Compensation

- This section shows any differences in compensation that have been excluded. This information is pulled from Step 4.1 of the Pay Equity Tool and is required in the plan under paragraph 51(1)(i) of the *Pay Equity Act*.

Section 8: Comparing Compensation

- This section confirms that the equal average method was used to compare male- and female-predominant job classes.

Section 9: Results

- Results from the Comparison of Compensation (s. 51(k)) include a list showing the female-predominant job classes that require an increase in compensation and hourly adjustment. This information is pulled from Step 5.2 of the Pay Equity Tool and is required under paragraphs 51(1)(j) and (k) of the *Pay Equity Act*.
- **Data to enter**
 - You must enter the female-predominant job classes from the chart above. These can be copied and pasted into this chart.
 - Enter how the compensation for each female-predominant job class will be increased.

Section 10: Date on Which Increase in Compensation Is Due

Compensation adjustment is due on the date that the final pay equity plan is posted.

- The adjustment can be made in one payment or phased-in if the total amount owing in compensation is more than 1% of the employer's payroll for the previous year.

Data to enter

- Select the checkbox that is appropriate for your situation, and then enter the date on which the first increase in compensation is payable.

Section 11: Employee Rights

- Employees have 60 days from the first day of this posting to request additional information or make comments.

Data to enter

- Contact person for any comments, requests or questions
- Deadline for providing comments
- Date on which the final pay equity plan will be posted

Section 12: Recourse

- The *Pay Equity Act* provides employees and bargaining agents with certain methods of recourse if they do not agree with the results of the pay equity plan.

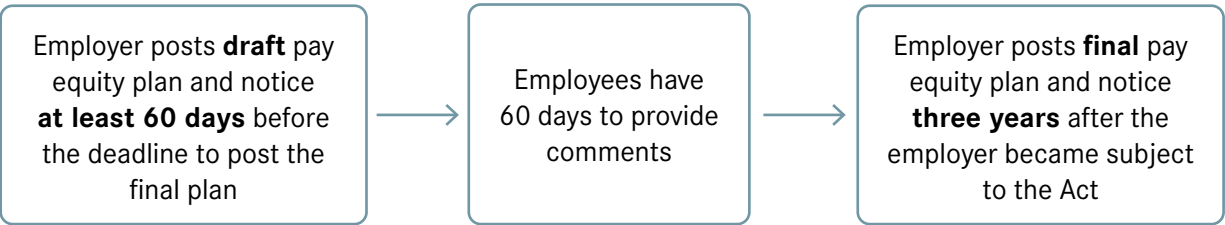
Agreements Page

- A signature page that can be signed by the employer and the pay equity committee to identify people who were part of the pay equity process, and to confirm to employees the accuracy of the information used to create the plan.

Step 7: Posting the draft and final versions of the pay equity plan

The final step in creating your pay equity plan is posting a draft and a final version.

Table 30
Pay Equity Plan Posting Process



Important note: Make sure to save your draft and final versions of your Excel and Word documents under different names for record keeping. For example:

- PEP_Tool_Draft_August2024.xlms and PEP_Summary_Template_Draft_August2024.docx
- PEP_Tool_Final_October2024.xlms and PEP_Summary_Template_Draft_October2024.docx

Appendix A: Instructions to Upload a .csv File

Follow these instructions to upload your .csv file.

To input your employee data, you have the option to upload your data into the tool using a .csv file as follows.

BEFORE USING THE TOOL

- Set up your internal data with the same headings and in the same order as what you see in the Tool (Position Title, Employee ID, Gender, Type of Base Pay, Base Hourly Rate, Minimum Salary Range, Maximum Salary Range, Related Job Class).
- Add a heading for row A (in the Tool, this row is blank since it will be used to number your entries; you will need a column A row as a holding spot for your upload, so that the number of columns matches those in the tool. You can name this column either **A** or **Blank**).
- Every position entered must include a position title and an employee ID. Any blanks in the Position Title or Employee ID column will block the upload of the file.
- Once you have your data file, save it as a .csv file (“CSV” means “comma-separated values”).

WITHIN THE TOOL

- Click on the **Upload .csv** button and import your .csv file version. The Tool will import your data. Once you have imported your file, you will be able to modify, add or delete positions as needed.