Solicitors Regulation Authority

Firm Diversity Data

User Guide

August 2015

Contents

1 Getting Started - Logging in

Note - Only the Organisation Contact, Authorised Signatory or RF1S role holder for your organisation is able to submit Diversity Data.

Guidance on adding these roles can be found in the mySRA user guide for organisations at www.sra.org.uk/userguide

1.1 Go to **https://diversity.sra.org.uk**

Before you begin
You need to have prepared the following:

1. Which firm or firms?
You need to know which firm or firms you are entering for.

You can link related organisations together and submit only one set of data. You will need the SRA ID number of any firms that you wish to link.

2. How many people?
You need to know how many people in total are working at the firm and how many did or did not respond to the questionnaire.

3. Record the responses
You need to have the aggregated responses from people working at the firm, broken down by the specified role categories.

Further guidance about the diversity data that needs to be collected is available in the Guidance section on the Resources page of the SRA website

→ **START**

1.2 Click **START**

1.3 Enter the username and password that you use to log on to MySRA

Tips:

• If you cannot remember your username you can request it by clicking on 'Forgotten username?'. You will need the current email address held on your record to use this facility

• If you cannot remember your password you can reset this information by clicking on 'Forgotten password?'. You will need your username and secret word in order to use this facility. Guidance on how to create a password can be obtained by clicking on the question mark next to the box

If you cannot remember your secret word or the email address held on your record, call the Contact Centre. We cannot provide this information by email or through the website.

http://www.sra.org.uk/contact-us/

You will need to navigate back to **https://diversity.sra.org.uk** once you have your username and password.

1.4 Click on **Log in**

1.5 You will be presented with the firm or firms that you are authorised to submit data for. If you have previously linked firms in order to make a single submission of data they will be shown grouped together

1.6 The status on the left hand side indicates whether the data for each firm or group of linked firms is Not Started, In Progress or Submitted

1.7 Click on **SELECT** next to the firm or firms that you wish to submit data for. **Note** - if you wish to add a new linked firm or remove a firm you will be able to do so on the next page

Select a firm

You have permission to submit data for the following firm(s):

SUBMITTED	Firm(s):	**999994 Test Firms 4;**	**SELECT**
		Last Updated: 03/08/2015 17:22:37 by Andyhyelmanmp2test7	

IN PROGRESS	Firm(s):	**999993 Test Firms 3;**	**SELECT**
		Last Updated: 04/08/2015 11:30:03 by andyhyelmanmp2test8	

IN PROGRESS	Firm(s):	**999992 Test Firms 2;**	**SELECT**
		Last Updated: 04/08/2015 12:39:36 by andyhyelmanmp2test7	

2 Adding and Removing Firms

> **Linking Related Firms:**
>
> You can link a corporate partner manager/body or other regulated entity, such as a nominee or trustee firm, to the main firm in order to create a group of firms. You can then make a single submission of diversity data to cover the group. To link firms or remove firms from an existing group use the **ADD FIRM** and **REMOVE** buttons.
>
> If you link firms please note that all Authorised Signatories, Organisation Contacts and RF1S role holders in the organisations you have linked will be able to view the amalgamated data.

2.1 If you wish to link a firm to the main firm or an existing group click on **ADD FIRM**

2.2 Type the firm's SRA ID number into the Search box

2.3 Click on **SEARCH**

2.4 The firm name will be displayed

2.5 Click on **SELECT** next to the firm to add it. Note - you will not be able to add firms that are already in a group or that have already submitted or started entering data (these will be indicated by a padlock icon in place of the **SELECT** button)

2.6 The firm you selected will now be displayed in the list of firms you are submitting data for

2.7 If you wish to add another firm repeat steps 2.1 - 2.6

2.8 To remove a firm from a group click on **REMOVE** next to the firm. **Note** - you will not be able to remove a firm if it is the only firm in the group that you are the Authorised Signatory, Organisation Contact or RF1S for. This will be indicated by a padlock icon in place of the **REMOVE** button.

Finding your SRA ID:

If you do not know the SRA ID number of the firm you wish to add you can find it by locating the firm on Find a Solicitor on the Law Society website. To do this:

- Go to http://solicitors.lawsociety.org.uk/

- Click on the Pro search tab

- Type the name of the firm in the Name field

- Click on Search

- Click on the name of the firm in the search results to view the SRA ID number, which is a five or six digit number

4 Question 1 - Role Categories

4.1 Enter the number of survey responses received from individuals in your firm(s) against each role category

Enter the totals for the firm(s) shown above:

ℹ You **do not** have to add zero into empty fields; empty fields will be treated as zero

Q1 Select the category which best describes your role in the firm

Solicitor (sole practitioner, partner, member or director)	4
Solicitor	11
Other fee earning role	2
Role directly supporting a fee earner	1
Managerial role	2
IT / HR / other corporate services role+	6
Barrister	
Chartered Legal Executive (Fellow of CILEx)	
Licensed Conveyancer	
Patent or Trade Mark Attorney	
Costs Lawyer	
Notary	
Prefer not to say	1
Invalid/No response to this question	2

TOTAL NUMBER OF RESPONDENTS: 29

4.2 If any individuals left Question 1 blank or gave an invalid response to this question you should record them under 'Invalid/No response to this question'

4.3 The system will automatically calculate the total number of respondents

How many did not respond to the questionnaire?

Did not respond	5

TOTAL NUMBER IN FIRM: 34

[SAVE] [SAVE AND CONTINUE]

4.4 Enter the number of individuals that did not respond to the questionnaire

4.5 The system will automatically calculate the total number in the firm who were invited to complete the questionnaire (the sum of the responses and the 'Did not responds')

4.6 Click on **CONTINUE**

5 Questions 2-14 – Entering Diversity Data

5.1 This is where you enter the data which you will need to do one role category at a time. You will see tabs on the left of the screen for each role category that you entered a number against. The vertical red line on the left of the tab indicates the tab that is open.

5.2 The red number on the top right indicates the number of people in the role category that is open. In the example below, there are 4 partners, so your response to each question for this role category will have to equal 4.

5.3 The grey tick next to the question will turn green when you have reached the expected total for that question

5.4 If the numbers you enter exceed the total expected for the question the tick will turn into a red cross. You will need to correct the numbers you have entered so that they total the correct number and the tick turns green.

Firm(s): 999991 Test Firms 1;

For the highlighted role, enter responses to all questions before clicking 'Save and Continue' to go to the next role.

Responses to each question must total **4**

Solicitor (sole practitioner, partner, member or director)	Q2 How would you describe your role within the firm? ❌
Solicitor	Sole practitioner, Partner, Member or Director — 3
Role supporting fee earner	Associate or Assistant — 2
	Other employee or staff member —
	Prefer not to say —
	Invalid/No response to this question —

5.5 When you have entered the data for Questions 1-14 click on **CONTINUE**

5.6 If the responses for any question do not total the expected number you will not be able to proceed to the next tab and will need to correct the responses before continuing. Check for any questions without a green cross to locate the data that needs amending

5.7 Click on **CONTINUE**

5.8 The system will open the next role category and show the first role category   with a green tick to indicate that it is complete

Firm(s): 999991 Test Firms 1;

For the highlighted role, enter responses to all questions before clicking 'Save and Continue' to go to the next role.

Responses to each question must total **8**

Solicitor (sole practitioner, partner, member or director) ✔	Q2 How would you describe your role within the firm? ✓
Solicitor	Sole practitioner, Partner, Member or Director —
Role supporting fee earner	Associate or Assistant —
	Other employee or staff member —
	Prefer not to say —
	Invalid/No response to this question —

5.9 Continue to enter the numbers for Questions 1-14 for each role category. You can save your progress at any time by clicking on **SAVE** at the bottom of the screen. When you have completed the final tab click on **CONTINUE**

6   Publication

6.1 Click **YES** or **NO** to indicate whether the firm has published its diversity data

6.2 If **YES** is selected enter details of where the data has been published

Publication

You are required to publish the firm's diversity data

1. Has the firm published the diversity data submitted?	YES ● NO ○

Please enter the full website URL, or the name of the publication, where the data has been published:

www.website.com/diversity

→ CONTINUE

6.3 If **NO** is selected enter the firm's reason for not publishing the data

Publication

You are required to publish the firm's diversity data

1. Has the firm published the diversity data submitted?	YES ○ NO ●

Please select a reason for not publishing the data: Cannot publish without identif ▼

Please specify your reason for selecting 'other':

→ CONTINUE

6.4 Click on **CONTINUE**

7 Submit

7.1 The system will display a preview of your data. **Note** - if you want a copy of the data you can download it in the next screen

Submit

Click 'Submit' at the bottom of the page to submit your data. You can amend the data after you have submitted if you need to.

You are about to submit data for the following firms:

- 999991 Test Firms 1

A preview of the data you are submitting:

You will be able to download a copy of this data on the next page

Question	Response	Solicitor (partner/director)	Solicitor	Role directly supporting fee earner	IT/ HR/ other corporate services role	Invalid Response
1. Select the category which best describes your role in the firm		9	19	4	7	1
2. How would you describe your role in the firm?	Sole practitioner, partner, member or director of the firm	3	0	0	0	1
	Associate or Assistant	4	8	0	1	0
	Other employee or staff member	2	9	4	6	0
	Prefer not to say	0	1	0	0	0
	Invalid response	0	1	0	0	0
3. Do you have a share in the ownership of your organisation (eg	Yes	3	1	0	0	1
	No	6	18	4	7	0

7.2 If you are happy that the data has been entered correctly click on **SUBMIT**

12. If you went to University (to study a BA, BSc course or higher), were you part of the first generation of your family to do so?	No	0	8	0	0	0
	Did not attend University	1	6	3	0	0
	Prefer not to say	0	0	0	0	0
	Invalid response	0	0	0	0	0
13. Are you a primary carer for a child or children under 18?	Yes	3	12	2	7	0
	No	6	7	2	0	1
	Prefer not to say	0	0	0	0	0
	Invalid response	0	0	0	0	0
14. Do you look after, or give any help or support to family members, friends, neighbours or others?	No	7	16	3	7	0
	Yes, 1 - 19 hours a week	1	1	1	0	1
	Yes, 20 - 49 hours a week	0	0	0	0	0
	Yes, 50 or more hours a week	0	1	0	0	0
	Prefer not to say	1	1	0	0	0
	Invalid response	0	0	0	0	0

Number of non-respondents: 8

Location of publication: www.website.co.uk/diversity

→ **SUBMIT**

7.3 If you need to go back to any section of the form to make changes click on one of the progress buttons at the top of the screen to go straight to that section

Introduction	Firms	Responses	Publication	Submit	Finish
✓	✓	●	○	○	○

7.4 When you have made your changes use the **CONTINUE** buttons to proceed to the Submit screen and click on **SUBMIT**

8   Finish

8.1 The system will display a message confirming that your data has been successfully submitted

Submitted Successfully

Submitted on 12/08/2015 00:00:00 by andyhyelmanmp2test

You have submitted data for the following firms:

- 999991 Test Firms 1

We have received your data and you do not need to take any further action.

You can return to this form and edit your submission at any time.

You may print this confirmation screen for your own records or download a copy of the submitted data using the buttons below.

DOWNLOAD DATA   **PRINT THIS SCREEN**

8.2 If you wish to print a copy of this confirmation screen click on **Print Screen**

8.3 If you wish to download a copy of the data into a spreadsheet click on **Download**

9 Amending Submitted Data

9.1 You can add a firm into a group after data has been submitted for the group provided that the firm has not submitted or started entering data separately

9.2 It is possible to amend diversity data after it has been submitted. If you make any changes to the diversity data for a firm or group of linked firms with a status of 'Submitted' the status will be reset to 'In Progress'. You will need to resubmit the data once you have made the required changes and this will over-write the data submitted previously.

9.3 You can remove a firm from a group that has already submitted data and the data will be retained with the group. All data will be cleared from the firm that is removed.

10 Troubleshooting

10.1   The website will work with most modern browsers but the experience will be optimised in Google Chrome

10.2   If you are experiencing problems with the system validating the numbers you enter (e.g. the green ticks and red crosses don't appear in the Responses page) it may be because you have JavaScript disabled in your browser settings. You will need to enable JavaScript for the site to dynamically validate the numbers although you will still be able to complete the form without it. The system will not allow you to <Save and Continue> at the end of a Role Category tab if the numbers don't add up correctly regardless of JavaScript being enabled.

10.3 **An error has occurred**

If you experience this error message it is likely to be because:-

- You have entered a character other than a number into a number field or
- You have used a special character such as angle brackets (<>) in a text field (e.g. on the Publication page)

You should click on the **Back** button in your browser to return to the last page. Enter your data again ensuring that any number fields contain only numbers and that there are no special characters in text fields (ordinary characters such as full stop, comma, colon and forward slash are fine).

Once you have checked for invalid characters click on **SAVE AND CONTINUE** again. You should find that the data is saved and you are able to proceed to the next page of the form.

This error is most likely to occur if you are using Internet Explorer Version 8 with JavaScript disabled. If the problem recurs you could try enabling JavaScript or using a different browser to access the site e.g. Google Chrome or Firefox.