Firm Diversity Data
User Guide 2019
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1. Introduction – logging in

Important - only authorised signatories, organisation contacts, and RF1S role holders for your organisation can log into the diversity data reporting tool. Guidance on adding these roles can be found in our mySRA user guide for organisations.

Go to the diversity reporting tool, here.

The progress bar at the top of the screen lets you know where you are in the questionnaire.

Click on BEGIN
Enter your mySRA username and password

I cannot remember my mySRA username or password

Username:
- Click on Forgot mySRA username? – you will be redirected to mySRA
- Enter your email address and press Submit
- Your username will be emailed to you.

Password:
- Click on Forgot mySRA password? – you will be redirected to mySRA
- Enter your username and press Submit
- A link will be sent to your email address
- Click on the link and then confirm your username
- Change your password.

If you cannot remember the email address held on your record, please contact us.

Remember - once you know your mySRA login details, go back to the diversity reporting tool, here.

Click on Log in
2. Select firm(s)

The firms you are authorised to submit data for will be listed here. If you have previously linked firms in order to make a single submission of data, they will still be grouped together.

The status on the left tells you that the submission of data for the firm or firm group:

- has NOT STARTED
- is IN PROGRESS, or
- has been SUBMITTED

Click SELECT to start submitting data for a firm. If the submission is IN PROGRESS or has already been SUBMITTED click on EDIT.

If you need to edit or create a group so that your submission covers other firms, you can do this in the ‘Enter data’ section.
3. Enter data: question 1 - role categories

Do you want your submission to cover your other firm(s)?

You can link other related firms, such as a corporate partner manager/body or other regulated entity, such as a nominee or trustee firm, to your main firm in order to create a group of firms. This will allow you to make a single submission of diversity data for this group.

Please see section 9 for guidance in creating or editing a firm group.

You will then need to enter the number of survey responses received from individuals in your firm(s) against each role category. If there were no responses for a particular role category, tick ‘None’.

For each role category enter the number of responses, then click ‘Enter data’. If there are no responses you must tick ‘None’.

<table>
<thead>
<tr>
<th>Role category</th>
<th>Number of responses</th>
<th>None</th>
<th>Enter data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solicitor partners (sole practitioner, member or director)</td>
<td>2</td>
<td>None</td>
<td>Enter data</td>
</tr>
<tr>
<td>Solicitor (not partner)</td>
<td>6</td>
<td>None</td>
<td>Enter data</td>
</tr>
<tr>
<td>Other fee earning role</td>
<td>3+</td>
<td>None</td>
<td>Enter data</td>
</tr>
<tr>
<td>Role directly supporting a fee earner</td>
<td>0</td>
<td>None</td>
<td>Enter data</td>
</tr>
<tr>
<td>Managerial role</td>
<td>0</td>
<td>None</td>
<td>Enter data</td>
</tr>
<tr>
<td>IT/HR/Other corporate services role+</td>
<td>0</td>
<td>None</td>
<td>Enter data</td>
</tr>
<tr>
<td>Barrister</td>
<td>0</td>
<td>None</td>
<td>Enter data</td>
</tr>
<tr>
<td>Chartered Legal Executive (Fellow)/CILEx Practitioner</td>
<td>0</td>
<td>None</td>
<td>Enter data</td>
</tr>
<tr>
<td>Licensed Conveyancer</td>
<td>0</td>
<td>None</td>
<td>Enter data</td>
</tr>
<tr>
<td>Patent or Trade Mark Attorney</td>
<td>0</td>
<td>None</td>
<td>Enter data</td>
</tr>
<tr>
<td>Costs Lawyer</td>
<td>0</td>
<td>None</td>
<td>Enter data</td>
</tr>
<tr>
<td>Notary</td>
<td>0</td>
<td>None</td>
<td>Enter data</td>
</tr>
<tr>
<td>Prefer not to say</td>
<td>0</td>
<td>None</td>
<td>Enter data</td>
</tr>
<tr>
<td>Invalid/no response to this question</td>
<td>0</td>
<td>None</td>
<td>Enter data</td>
</tr>
</tbody>
</table>
After you have entered a number for a role category, you can click ‘Enter data’ and will be directed to questions numbered 2-14.

You must enter a number or click none for each role category and also enter the number of individuals who did not respond to the questionnaire.

The system will automatically calculate the total number of people in your firm.

Go to the next section of the user guide for guidance on entering the diversity data for each role category.
4 Enter data - questions 2-14

After clicking 'Enter Data' next to a role category, you will be presented with questions numbered 2 – 14.

The number of responses you enter in the relevant categories for each question must match the number of responses you entered for the role category:

If you have not entered the correct number of responses, you will see a red cross and an error message.
Once you have entered the correct number of responses, you will see a green tick.

Responses to each question must total 2

Once you have answered all of the questions, click on SAVE under question 14.

You will be taken back to the 'Enter data' role categories page.

- If you answered all of the questions for a role category, the status will show as COMPLETED. You can still edit your data if needed.

- If you have not answered all of the questions for a role category, the status will show as INCOMPLETE. You will need to click 'Edit' to complete this section before you can move on.

- If you have not started entering data for a role category, you need to click ‘Enter Data’.
Remember - Once you have finished answering the questions, click on SAVE under question 14.

Once the status for all of the relevant role categories is COMPLETED, you can either click on SAVE AND RETURN if you want to continue at a later date or SAVE AND CONTINUE to move on.

If you click on SAVE AND CONTINUE when a role category has an INCOMPLETE status, you will get an error message prompting you to complete it:
5. Publication

You will be asked to confirm whether or not you have published the data.

Have you published this diversity data?  

If you select ‘YES’ you will need to select one of the available options to tell us where the data was published.

Please tell us where this data has been published:
- Firm website
- Notice in office
- Firm publication
- Other

If you select ‘NO’ you will need to select one of the available options to say why you have not published.

Please select the option which best describes why you have not published:
- Publication planned but not yet complete
- Small firm
- Sole practitioner so cannot publish without identifying people
- Insufficient data received from staff to make publication meaningful
- Staff have objected to publication
- Other

If you select ‘Other’, please specify your reasons for selecting ‘Other’.

Please specify your reason for selecting ‘other’:

The click ‘Save and Continue’.
6. Review and submit

The system will display a preview of your data.

**Note** - if you want a copy of the data, you can download it after it has been submitted in the next section.

Making changes to the data

If you need to make any changes, click on the appropriate progress button at the top of the screen to go straight to that section.

Once you have made your changes use the **SAVE AND CONTINUE** buttons to proceed to the 'Review and submit' screen.

If you spot any issues with the data once you have clicked on submit, you can edit the data. For guidance on editing data after it has been submitted, [click here](#).
### Submitting the data

If you are happy that the data has been entered correctly, click on **SUBMIT** at the bottom of the page.

<table>
<thead>
<tr>
<th>No.</th>
<th>Time spent providing unpaid care for these with long term physical or mental ill health caused by disability or age</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1 - 19 hours a week</td>
</tr>
<tr>
<td>2.</td>
<td>20 - 49 hours a week</td>
</tr>
<tr>
<td>3.</td>
<td>50 or more hours a week</td>
</tr>
<tr>
<td>4.</td>
<td>Prefer not to say</td>
</tr>
<tr>
<td>5.</td>
<td>Invalid / no response to this question</td>
</tr>
</tbody>
</table>

**Number of non-respondents:** 0

**Location of publication:** Firm website

You can download this data on the next page. You can amend the data after you have submitted.

[Submit Button]
After you have clicked on **SUBMIT**, the system will display the following message:

![Submitted Successfully](image)

If you want to print a copy of this confirmation screen, click on **PRINT THIS SCREEN**.

If you want to download a copy of the data into a spreadsheet, click on **DOWNLOAD DATA**.

The status of the diversity data submission on the ‘Select firm(s)’ page will change to **SUBMITTED**.
8. Changing submitted data

To edit submitted data, go to the ‘Select Firm(s)’ section and click on EDIT, followed by OK.

**Important** - Once you start editing the data, the status will change from SUBMITTED to IN PROGRESS. Once you have finished editing the data, you need to resubmit to save these changes.

You can make changes to firm groups after submission. For guidance on adding and removing firms, click here.

Click on the SAVE AND CONTINUE buttons to proceed to the ‘Review and submit’ screen.

Click on SUBMIT.

Once you have re-submitted the data and are presented with the Successfully Submitted screen, the status on the ‘Select firm(s) page will change back to SUBMITTED.
9. Creating and making changes to a firm group

You can create a firm group or make changes to an existing firm group in the ‘Enter data’ section.

To create a new group, click on Show Me. If there is already a group of firms, click on ADD/REMOVE FIRM.

You can link related firms such as a corporate partner manager/body or other regulated entity, such as a nominee or trustee firm, to your main firm in order to create a group of firms. This will allow you to make a single submission of diversity data to cover this group.

**Note** - if you link firms, all of the authorised signatories, organisations contacts, and RF1S role holders in the organisations you have linked will be able to view the amalgamated data.

You can create a firm group or make changes to an existing firm group in the ‘Enter data’ section.

To create a new group, click on Show Me. If there is already a group of firms, click on ADD/REMOVE FIRM.

Click on ADD FIRM.

Enter the SRA ID number of the firm you want to add into the ‘Search’ box.

You are unable to search with the name of a firm.
After entering the firm's SRA number, click on SEARCH.

The name of the firm will be displayed for you to check and then select 'ADD'.

Finding an SRA ID number

If you do not know the SRA ID number of the firm you want to add, you can find it by looking for the firm on the Law Society's Find a Solicitor website:

- Go to Find a solicitor
- Click on the ‘Pro-search’ tab
- Type the name of the firm into 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.

Note - you will not be able to add firms that are already in a group or that have already submitted or started entering their data. This will be indicated by a padlock icon.

The firms in this group will now be listed below. Repeat the above steps if you want to add other firms.
If you want to remove a firm from a group, click on **REMOVE**.

**Note** - you will not be able to remove a firm if it is the only firm in the group that you are the AUS/ORC/RF1S for. This will be indicated by a padlock icon.

Once you have made the necessary changes to the firm group, click on **BACK**.

[Click here](#) to go back to the ‘Enter data’ guidance.