Solicitors Regulation Authority

Firm Diversity Data
User Guide 2019

Contents

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

Law Firm Diversity Data   **LOG OUT**

Introduction   Select firm(s)   Enter data   Publication   Review and submit   Finish

Before you begin

Have you organised your questionnaire data?   You need to: organise the diversity data by the specified role categories, so you can input the data for each role category in turn.

Do you know how many people did not respond?   You need to: enter the number of people who did not respond to the diversity questionnaire.

More than one firm?   You can submit one set of diversity data to cover your firm and any related firm, for example a corporate partner. Have the SRA number to hand for any new firms that you want to include in your submission.

ℹ You need to have your mySRA username and password to be able to log in on the next page.

→ BEGIN

ℹ To find out more information visit Solicitors Regulation Authority - Law Firm Diversity
Please note that only authorised signatories or organisation contacts can log in.

Click on **BEGIN**

Enter your mySRA username and password

Login

Only authorised signatories or organisation contacts can log in.

Login with your mySRA credentials

mySRA username

mySRA password

🔓 Log in   Forgot mySRA username?   Forgot mySRA 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)

Introduction   Select firm(s)   Enter data   Publication   Review and submit   Finish
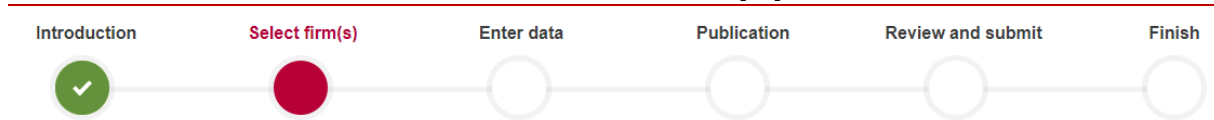
The firms you are authorised to submit data for will be listed here. If you have previously linked firms in order to make a single submission of data, they will still be grouped together.

Your firm(s)
You have permission to submit data for the firm(s) below.

| NOT STARTED | **999991 Test Firms 1** | **SELECT** |

ⓘ Once you have made your selection you can create or amend a group on the next page.

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**

| IN PROGRESS | **999991 Test Firms 1**
Last Updated 05/07/2017 08:53:29, by: Username | **EDIT** |

| SUBMITTED | **999991 Test Firms 1**
Submitted 06/07/2017 00:00:00, by: Username | **EDIT** |

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

Introduction	Select firm(s)	Enter data	Publication	Review and submit	Finish
✓	✓	●	○	○	○
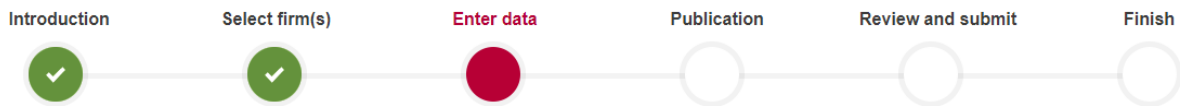
Do you want your submission to cover your other firm(s)?

Firm(s): 999991 Test Firms 1;

Do you want your submission to cover your other firm(s)? [Show me]

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'**.

Q1 Role

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

Role	Number	None	
Solicitor partners (sole practitioner, member or director)	2	☐ None	Enter data
Solicitor (not partner)	6	☐ None	Enter data
Other fee earning role	3	☐ None	Enter data
Role directly supporting a fee earner N/A	0	☑ None	
Managerial role N/A	0	☑ None	
IT/HR/other corporate services role+ N/A	0	☑ None	
Barrister N/A	0	☑ None	
Chartered Legal Executive (Fellow)/CILEx Practitioner N/A	0	☑ None	
Licensed Conveyancer N/A	0	☑ None	
Patent or Trade Mark Attorney N/A	0	☑ None	
Costs Lawyer N/A	0	☑ None	
Notary N/A	0	☑ None	
Prefer not to say N/A	0	☑ None	
Invalid/no response to this question N/A	0	☑ None	

After you have entered a number for a role category, you can click **'Enter data'** and will be directed to questions numbered 2-14.

Solicitor partners (sole practitioner, member or director)
2 ☐ None   Enter data

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.

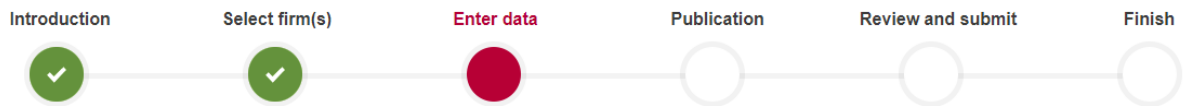**Enter the number of people who did not respond to the diversity questionnaire.**
Did not respond   0 ☑ None

TOTAL NUMBER IN FIRM: 11

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.

Solicitor partners (sole practitioner, member or director)   Responses to each question must total: **2**

Q2 Age

16 - 24	
25 - 34	
35 - 44	
45 - 54	
55 - 64	
65+	
Prefer not to say	
Invalid/no response to this question	

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.

Responses to each question must total: **2**

16 - 24	
25 - 34	5
35 - 44	1
45 - 54	
55 - 64	
65+	
Prefer not to say	
Invalid/no response to this question	

There should only be 2 respondent(s) for this role!

Once you have entered the correct number of responses, you will see a green tick.

Responses to each question must total: **2**

16 - 24	
25 - 34	1
35 - 44	1

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

Q14 Time spent providing unpaid care for those with long term physical or mental ill health caused by disability or age

No	1
Yes, 1 - 19 hours a week	1
Yes, 20 - 49 hours a week	
Yes, 50 or more hours a week	
Prefer not to say	
Invalid/no response to this question	

SAVE

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 stared entering data for a role category, you need to click **'Enter Data'.**

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

Solicitor partners (sole practitioner, member or director)	COMPLETED	2	☐ None	Edit
Solicitor (not partner)	INCOMPLETE	6	☐ None	Edit
Other fee earning role		3	☐ None	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.

Enter the number of people who did not respond to the diversity questionnaire.	Did not respond	0	☑ None

TOTAL NUMBER IN FIRM: 11

💾 SAVE AND RETURN	→ SAVE AND CONTINUE

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:

::: Solicitors **Regulation** Aut

aw Firm Diversity Data

sradiversityuat.lawsociety.int says:

You need to enter diversity data for each role category where there is a figure greater than 0 before you can click 'SAVE AND CONTINUE'. To do this, click on the 'Enter data' or 'Edit' button next to each role category.

OK

LOG OUT

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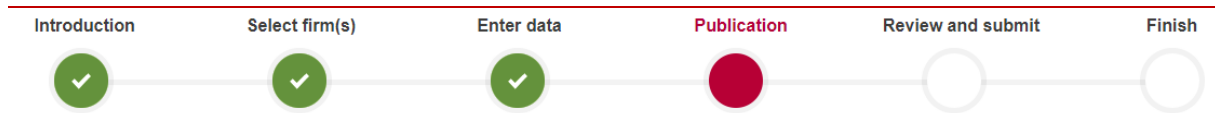
You will be asked to confirm whether or not you have published the data.

| Have you published this diversity data? | YES ○ NO ● |

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

| Have you published this diversity data? | YES ● NO ○ |

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.

| Have you published this diversity data? | YES ○ NO ● |

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
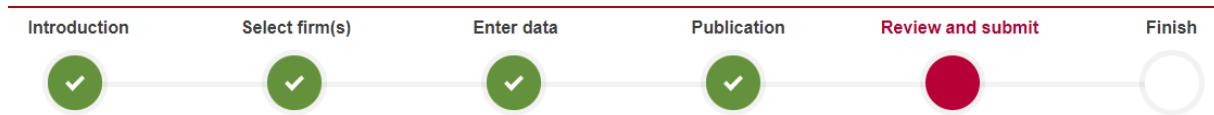○ Staff have objected to publication
○ Other

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

Introduction	Select firm(s)	Enter data	Publication	Review and submit	Finish
✓	✓	✓	✓	●	○

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.

Review and submit

Review your data before submission, you can amend your 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:

Question	Response	Solicitor partners (sole practitioner, member or director)	Solicitor (not partner)	Other fee earning role
1. Select the category which best describes your role in the firm		2	6	3
2. Age	16 - 24		2	3
	25 - 34		6	
	35 - 44			
	45 - 54			
	55 - 64			
	65+			
	Prefer not to say			
	Invalid / no response to this question			
3. Gender	Woman			3
	Man		2	6
	Other preferred description			
	Prefer not to say			

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.

	No	1
14. Time spent providing unpaid care for those with long term physical or mental ill health caused by disability or age	Yes, 1 - 19 hours a week	1
	Yes, 20 - 49 hours a week	
	Yes, 50 or more hours a week	
	Prefer not to say	
	Invalid / no response to this question	

Number of non-respondents: 0

Location of publication: Firm website

ℹ You can download this data on the next page.
You can amend the data after you have submitted.
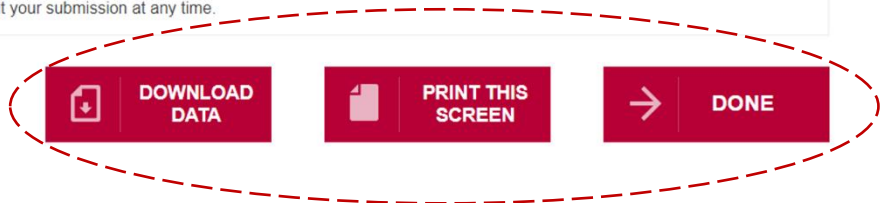
→ | **SUBMIT**

7. Finish
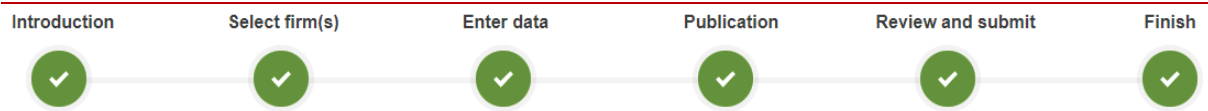
After you have clicked on **SUBMIT**, the system will display the following message:

Submitted Successfully

Submitted 06/07/2017 00:00:00, by: Username

You have submitted data for the following firms:

- **999991 Test Firms 1**

Thank you for subitting your data, you do not need to take any further action.

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

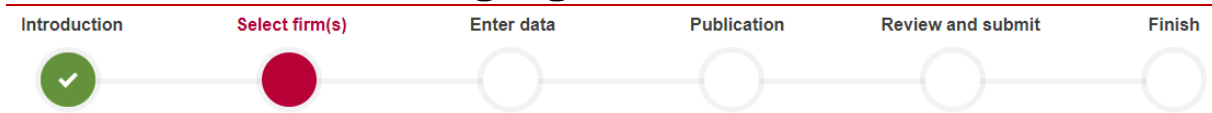DOWNLOAD DATA   PRINT THIS SCREEN   DONE

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.**

SUBMITTED   **999991 Test Firms 1**   EDIT

Submitted 06/07/2017 00:00:00, by: Username

8. Changing submitted data

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

SUBMITTED	**999991 Test Firms 1** Submitted 06/07/2017 00:00:00, by: Username	EDIT

	Your firm(s) You have permission to submit	
	Please note ☒	
	Editing your data will change your status to 'In progress'. Please re-submit the data when you have finished.	
SUBMITTED	**605118 ERACLEOUS & MCK** Submitted 14/07/2017 16:01:44,	EDIT
	OK CANCEL	
ⓘ	Once you have made your sele	

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.

|		
IN PROGRESS	**999991 Test Firms 1** Last Updated 05/07/2017 08:53:29, by: Username	EDIT

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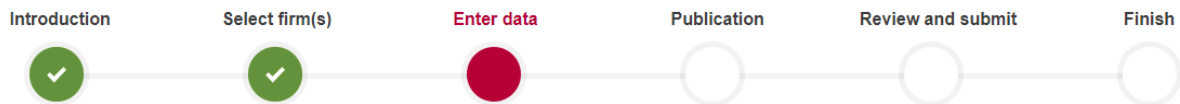
You can link related firms such as a corporate partner manager/body or other regulated entity, such as a nominee or trustee firm, to you main firm in order to create a group of firms. This will allow you to make a single submission of diversity data to cover this group.

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.**

Firm(s): 999991 Test Firms 1;

Do you want your submission to cover your other firm(s)? [Show me]

Click on **ADD FIRM.**

Firm(s): 999991 Test Firms 1;

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

Add a firm to create a group

This means that you can submit one set of diversity data for the group, rather than submitting the data for each firm   [**ADD FIRM**]

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

| Enter an SRA number... | 🔍 SEARCH |

You are unable to search with the name of a firm.

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.

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'**.

Firm(s): 999991 Test Firms 1;

Use the search box below to find a related firm to add to your firm or firm group:

| 999994 | 🔍 SEARCH |

| 999994 Test Firms 4 | **ADD** |

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.

| **999991 Test Firms 1** | 🔒 |

| 999994 Test Firms 4 | **REMOVE** |

ℹ Please note that all authorised signatories and organisation contacts of firms in a group will be able to view and edit the data

↩ **BACK**

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.