# *Insight* Quick Reference | *MD-715 Report*

What is the MD-715 report?

- Management Directive 715 (MD-715) requires government agencies to report gender, ethnicity, race, and disability data to the Equal Employment Opportunity Commission (EEOC) every fiscal year.
- The structure and data requirements of the MD-715 report are based on EEOC standards.
- The A Series MD-715 reports on gender, ethnicity, and race and the B Series MD-715 reports on disability data.
- Users can run the MD-715 report in *Insight,* export to Excel, and generate an XML output from the Excel.
- The Excel export includes several conversion mechanisms to modify data to accommodate Agency-specific requirements.

Run the MD-715 Report in Insight

1. Click the **Catalog** action link from the top navigation bar.
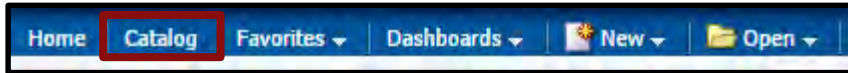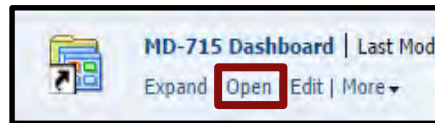

2. Expand the following folders:

   Shared Folders >>
   Common Report Library >>
   Regulatory Reports.

3. Click the **Open** action link for the MD-715 Dashboard.

4. Select either the A or B series tab to run the respective report.

5. Select values for the Year, Department, and Agency report prompts.

Note: Users are encouraged to run the MD-715 for a single department or single agency at a time. Running the report for multiple selections has had inconsistent results in the past. Please contact the NFC Contact Center for more information.
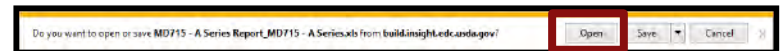
6. Click **Apply**.
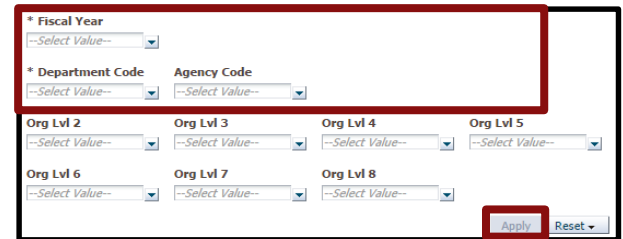
Note: If a user selects an organization level for which there is no data, the organization will not appear in the header of the Excel export.

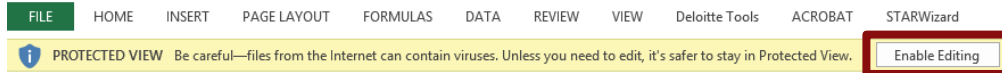7. Click the Excel export icon on the right hand side of the page.
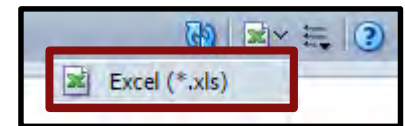
8. Click **Open** in the pop-up box at the bottom of the screen.

Use the MD-715 Report in Excel

Open the MD-715 Report

The report opens to the first tab of a Microsoft Excel workbook, which includes the Report Filters and the Table of Contents page. Click **Enable Editing** below the Excel ribbon to use the report.

Click a report or its corresponding tab at the bottom of the workbook to navigate between tables. There are fourteen tables in each MD-715 Series report, containing data about gender, ethnicity, race, and disability based on EEOC requirements.

Note: *See page 3-4 of this QRG for a complete list of tables.*
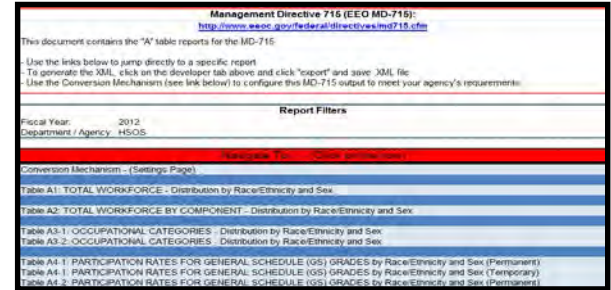
Adjust Formula Settings

The first time you run an MD-715 report, it is necessary to adjust the formula calculation settings: File >> Options >> Formulas, then check "Enable Iterative Calculations," and set maximum iterations to 500.
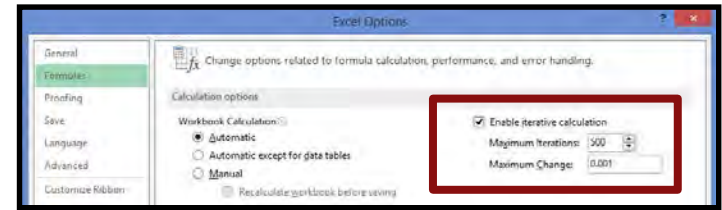
View MD-715 Excel Tabs

The MD-715 report is composed of several tabs, including:

- **Home Page tab:** Contains the Table of Contents and lists Report Filters applied to the report
- **Conversion Mechanism tab:** Contains global and table-specific conversions for users to modify
- **A1-A14:** Contains tables with gender, ethnicity, race, and disability data required by EEOC.

Use the Conversion Tab

It is critical to review the Conversion Mechanism tab before using the MD-715 report. The conversion mechanisms default to the most commonly used values, but users can modify the conversions to meet Agency-specific requirements. There are both global conversions and table-specific conversions.

Note: *See pages 5-6 of this QRG for instructions to modify these conversions.*
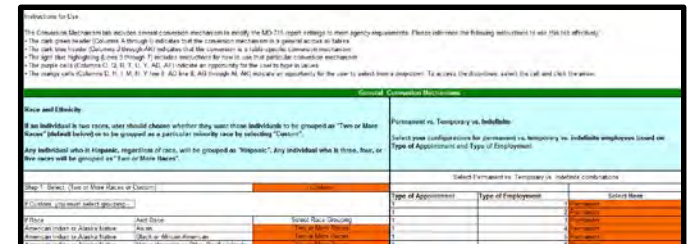
MD-715 A Series Tables

The A series tables include data about gender, race, and ethnicity, including certain data and certain conversions:
- Each table contains data on permanent, temporary, and / or non-appropriated employees.
- Each table calculates percentages either across rows or down columns.
- Some tables utilize a conversion mechanism (See Slide 5-6 for descriptions), as indicated in bold in the table below.

A Series MD-715 Tables	
A1: Total Workforce - Distribution by Race/Ethnicity and Sex (Permanent, Temporary, Non-Appropriated) • Permanent, Temporary, and Non-Appropriated	A8: New Hires by Type of Appointment - Distribution by Race/Ethnicity and Sex • Permanent, Temporary, and Non-Appropriated
A2: Total Workforce by Component - Distribution by Race/Ethnicity and Sex • Permanent	A9: Selections for Internal Competitive Promotions for Major Occupations by Race/Ethnicity and Sex • Permanent
A3: Occupational Categories - Distribution by Race/Ethnicity and Sex • A3-1 Permanent: Percentages calculated across the row • A3-2 Permanent: Percentages calculated down the column **Conversion Mechanism: Occupational Category Conversion**	A10: Non-Competitive Promotions – Time in Grade - Distribution by Race/Ethnicity and Sex • Permanent
A4: Participation Rates for General Schedule (GS) Grades by Race/Ethnicity and Sex • A4-1 Permanent: Percentages calculated across the row • A4-1 Temporary: Percentages calculated across the row • A4-2 Permanent: Percentages calculated down the column • A4-2 Temporary: Percentages calculated down the column **Conversion Mechanism: General Schedule Conversion**	A11: Internal Selections for Senior Level Positions (GS 13/14, GS 15, and SES) by Race/Ethnicity and Sex • Permanent
A5: Participation Rates for Wage Grades by Race/Ethnicity and Sex • A5-1 Permanent: Percentages calculated across the row • A5-1 Temporary: Percentages calculated across the row • A5-2 Permanent: Percentages calculated down the column • A5-2 Permanent: Percentages calculated down the column **Conversion Mechanism: Wage Grade Conversion**	A12: Participation in Career Development - Distribution by Race/Ethnicity and Sex • Permanent
A6: Participation Rates for Major Occupations - Distribution by Race/Ethnicity and Sex • A6 Permanent • A6 Temporary **Conversion Mechanism: Occupational Series Conversion**	A13: Employee Recognition and Awards - Distribution by Race/Ethnicity and Sex • Permanent **Conversion Mechanism: Quality Step Increases (QSI) Conversion**
A7: Applicants and Hires for Major Occupations by Race/Ethnicity and Sex • A7 Permanent • A7 Temporary	A14: Separations by Type of Separation - Distribution by Race/Ethnicity and Sex • Permanent **Conversion Mechanism: Separation NOA Conversion**

MD-715 B Series Tables

The B series tables include data about disability, including certain data and certain conversions:
- Each table contains data on permanent, temporary, and / or non-appropriated employees.
- Each table calculates percentage either across rows or down columns.
- Some tables utilize a conversion mechanism (See Slide 5-6 for descriptions), as indicated in bold in the table below.

B Series MD-715 Tables	
B1: Total Workforce - Distribution by Disability (OPM Form 256 Self-Identification Codes) • Permanent, Temporary, and Non-Appropriated	B8: New Hires by Type of Appointment - Distribution by Disability • Permanent, Temporary, and Non-Appropriated
B2: Total Workforce by Component - Distribution by Disability (OPM Form 256 Self-Identification Codes) • Permanent	B9: Selections for Internal Competitive Promotions for Major Occupations by Disability • Permanent
B3: Occupational Categories - Distribution by Disability Employees • B3-1: Permanent, Percentages calculated across the row • B3-2: Permanent, Percentages calculated down the column **Conversion Mechanism: Occupational Category Conversion**	B10: Non-Competitive Promotions - Time in Grade by Disability • Permanent
B4: Participation Rates for General Schedule (GS) Grades by Disability • B4-1 Permanent: Percentages calculated across the row • B4-1 Temporary: Percentages calculated across the row • B4-2 Permanent: Percentages calculated down the column • B4-2 Temporary: Percentages calculated down the column **Conversion Mechanism: General Schedule Conversion**	B11: Internal Selections for Senior Level (GS 13/14, GS 15, SES) Positions by Disability • Permanent
B5: Participation Rates for Wage Grades by Disability • B5-1 Permanent: Percentages calculated across the row • B5-1 Temporary: Percentages calculated across the row • B5-2 Permanent: Percentages calculated down the column • B5-2 Permanent: Percentages calculated down the column **Conversion Mechanism: Wage Grade Conversion**	B12: Participation in Career Development - Distribution by Disability • Permanent
B6: Participation Rates for Major Occupations - Distribution by Disability • B6 Permanent • B6 Temporary **Conversion Mechanism: Occupational Series Conversion**	B13: Employee Recognition and Awards - Distribution by Disability • Permanent **Conversion Mechanism: Quality Step Increases (QSI) Conversion**
B7: Applications and Hires by Disability (Permanent) • B7 Permanent • B7 Temporary	B14: Separations by Type of Separation- Distribution by Disability • Permanent **Conversion Mechanism: Separation NOA Conversion**

Note: Insight does not currently contain data for table B7 because the data is from outside PPS. Please use this table as a template.

MD-715 General Conversion Mechanisms

Race and Ethnicity Conversion (A Series Only)

The Race and Ethnicity Conversion allows the user to specify the race for an individual that has two or more races. The default for this individual is "Two or more races". If "Custom" is selected from the drop-down - you can select one of the two races, or "Two or more races."

Note: *See page 7 of this QRG for the RNO to ERI conversion.*

Permanent vs. Temporary vs. Indefinite Conversion (A and B Series)

The Permanent / Temporary / Non-Appropriated Conversion allows the user to define these terms by Type of Appointment and Type of Employment based on Agency requirements. Select Permanent, Temporary, or Non-Appropriated from the drop-downs in column H.

Disability Conversion (B Series Only)

The Disability Conversion allows the user to modify the conversion from old to new disability codes. The default is to convert old disability codes to new codes based on OPM guidelines from the SF-256 and the HR Data Standards Guide. Select a new Disability Status for each Disability Code from the drop-downs.

Organization Level Conversion (A and B Series)

The Organization Level Conversion allows the user to specify the Organization Level used to run the MD-715 report in *Insight*. The default Organization level is Agency, but users can select the Organization Level from the drop-down to indicate a more specific Organization level.

Note: *This setting is critical to returning accurate results. Please verify the Organization Level Conversion before using the MD-715 report.*

MD-715 Table-Specific Conversion Mechanisms

Occupational Category Conversion (A3-1, A3-2, B3-1, B3-2)

The Occupational Category Conversion allows the user to modify the categories based on Position Supervisory status, which are defined by EEOC here. If an employee has a Position Supervisory status of 2 or 4, the Occupational Category is 1. Position Supervisory Type 2 will default to the "Other" grouping for section 1 of this table. Position Supervisory code of 1 defaults to the "Executive/Mid-Level/First-Level" grouping. Type an Occupational Category and select a grouping based on Agency requirements.

Executive Pay Plan Conversion (A3, A4, B3, B4)

The Executive Pay Plan Conversion allows the user to specify their executive pay plans for their organization by typing appropriate pay plan codes.

General Schedule (GS) Conversion (A4-1, A4-2, B4-1, B4-2)

The GS Conversion allows the user to convert non-GS pay bands to the GS schedule. Type the Agency-specific Pay Plan and Grade in the equivalent GS pay band.

Wage Grade (WG) Conversion (A5-1, A5-2, B5-1, B5-2)

The WG Conversion allows the user to convert non-WG pay bands to the WG schedule. Type the Agency-specific Pay Plan and Grade in the equivalent WG pay band.

Occupational Series Conversion (A6, B6)

The Occupational Series Conversion allows the user to select whether to include the top seven Occupational Series by Employee Count or seven user-specified mission critical Occupational Series. **There is a separate conversion for permanent or temporary employees**. To set mission critical Occupational Series, select **Mission Critical** from the drop-down and type 1-7 next to each to order the Occupational Series.

New Hires Conversion (A8, B8)

The New Hires Conversion allows the user to enter the Nature of Action codes used by their specific agency for new hires. The default will be set to 100 series NOA codes. Type any additional NOA codes used by your agency.

Quality Step Increases (QSI) Conversion (A13, B13)

The QSI Conversion allows the user to choose whether QSI is calculated using Base Contract or Scheduled Salary. The default is Base Contract Salary. QSI is the difference between salaries after a within grade increase that is off schedule (892 NOA). Select an option from the drop-down.

Note: Some award types may be "N/A." This is because they are cash awards under $100, and the MD-715 only asks for cash awards greater than $100.

Separation NOA Conversion (A14, B14)

The Separation NOA Conversion allows the user to modify the separation type for each NOA code. Select a separation type from the drop-down.

Appendix

View Raw Data Used in Each Table

To view the data used to calculate the values in the MD-715, view the raw data tabs. By default, the raw data tabs are hidden. To access the raw data tabs:

1. Right click any tab at the bottom of the Excel sheet.
2. Select **Unhide**.
3. Select a raw data tab from the *Unhide* window.
4. Click **OK**.

Certain columns are *Insight* generated and others are calculated in Excel. To protect PII, raw data is broken down by groupings based on Employee Count instead of by employee.

Note: You can access the raw data reports that feed the MD-715 report in the Insight [Public Folder](). Expand the following folders Shared Folders >> Public >> MD-715 Raw Data >> A Series or B Series.

RNO to ERI Code Conversion

If RNO equals...	Then ERI equals...
Hispanic or Latino	
D - Hispanic	100000
Y - Not Hispanic in Puerto Rico	000000
American Indian or Alaskan Native	
A - American Indian or Alaskan Native	010000
Asian	
F - Asian Indian	001000
G - Chinese	001000
H - Filipino	001000
L - Japanese	001000
M - Korean	001000
P - Vietnamese	001000
Q - All Other Asian or Pacific Islanders	001000
B - Asian or Pacific Islander	001000
Black or African American	
C - Black, Not of Hispanic Origin	000100
Native Hawaiian or Other Pacific Islander	
J - Guamanian	000010
K - Hawaiian	000010
N - Samoan	000010
White	
E - White, Not of Hispanic Origin	000001

Generate XML for the MD-715 Report

Generate XML for the MD-715 report to deliver the data to EEOC.
1. Click the *Developer* tab in the Excel ribbon.
2. Click **Export** in the XML section.
3. Save the file.
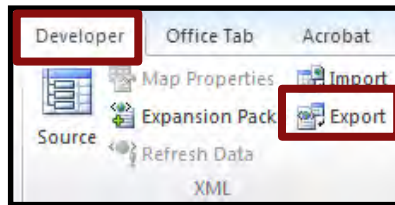
Optional: Add the Excel Developer Tab

To generate an XML output, add the Developer tab to the Excel workbook:
1. Click **File**.
2. Click **Options**.
3. Select **Customize Ribbon**.
4. Select **Main Tabs** from the Customize the Ribbon drop-down.
5. Click the **Developer** check box.
6. Click **OK**.

Appendix

Printing the MD-715 Report

To ensure clean printing of the full MD-715 report, it is helpful to adjust certain Excel settings. To set the print scaling:

1. Navigate to Table 2 and select all cells containing data to be printed

2. On the upper tabs of the workbook, click: Page Layout >> Page Setup >> Print Area >> *Set Print Area*

3. Hide the Conversion Mechanism tab by right-clicking it and selecting "Hide"

4. Navigate to File >> Print in the top left corner of the Excel output.

5. In the *Settings* list, select the first drop-down menu to adjust the page scaling, and choose **Print Entire Workbook**.

Note: To print a single sheet, navigate to the tab you'd like to print, then under this Print Settings menu select "Print Active Sheets."
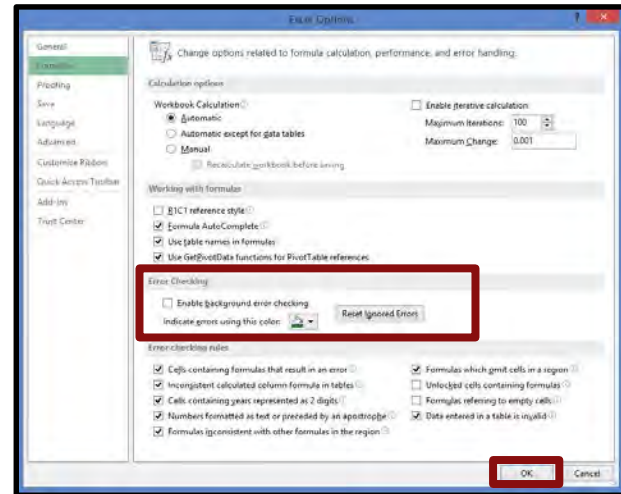

6. Click **Print**.
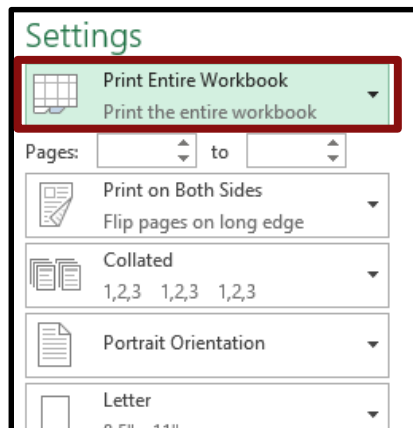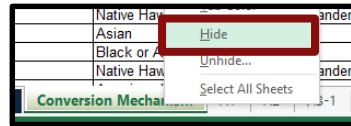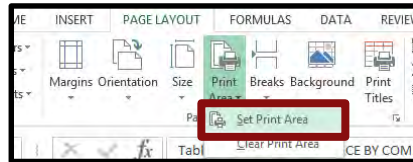
Adjusting the Error Default Display Preferences

In some versions of Excel, the default is set to display cell errors in a green font. Users can adjust this preference to display or hide the errors throughout the report.

To display or hide these errors throughout the report:

1. Navigate to File >> Options.

2. Select the **Formulas** menu.

3. Under the *Error Checking* section, select or deselect the "Enable background error checking" box.

4. Click **OK**.