

EmployerMaintenance – Employer Merge

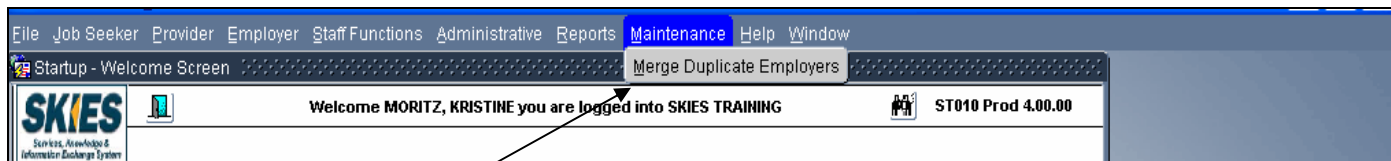
Training (user Role/Profile) determines access to SKIES. Each User Role determines the minimum amount of training required prior to receiving access. Training does not address or define User Roles or responsibilities but does address levels of User access within SKIES.

A User must have the Employer\_Merge Role to Merge Employer records. The Employer\_Merge Role allows local WDAs to merge duplicate Employer records. Staff Role training is required before assigning the Employer\_Merge Role. Local Access Approvers assign User(s) the Employer\_Merge Role.

An Employer record may be a Provider record since each shares the same data base. For this reason, when initiating an Employer\_Merge, the User must also look at areas of the SKIES application where the Employer record is used as a Provider.

Start      SKIES Welcome Screen

Step 1      On the Menu Bar, click > Maintenance > Merge Duplicate Employers.



Step 2      Click > Merge Duplicate Employers.

Step 3      The **Employer Merge – Locate Primary Employer** screen displays. Use this screen to query and select Employer record(s) to keep (Primary). Enter the desired search criteria. Click > EXECUTE QUERY button.

When a search returns one Employer, the information displays. When a search returns multiple Employers, click to select the desired Employer. Merge allows one Primary Employer at a time.

Step 4 Click to select the Primary Employer. The **Employer\_Merge** screen displays.

Has Job Orders?	UBI Number	Name	Phone	Address	City	Zip	Details
<input checked="" type="checkbox"/>	Select 52526363	ABC	(253) 111-2233	987 2ND STREET,	TACOMA	98402	
<input checked="" type="checkbox"/>	Select 601434190	ABC ACADEMY	(509) 233-8909	119 N PARK ST	CHEWELAH	99109	
<input checked="" type="checkbox"/>	Select	ABC ACCOUNTING	(253) 594-1122	56789 100TH ST	TACOMA	98402	
<input type="checkbox"/>	Select	ABC ACCOUNTING, INC.					
<input type="checkbox"/>	Select 876	ABC AGENCY		1 MEMORY LANE	LACEY	98513	
<input type="checkbox"/>	Select 786	ABC AND OTHERS	(206) 154-8655	1 MEMORY LANE	OLYMPIA	98513	
<input checked="" type="checkbox"/>	Select 601272205	ABC APPLIANCE SERVICE	(360) 577-1410	1036 14TH AVE PLAZA	LONGVIEW	98632	
<input type="checkbox"/>	Select	ABC AUDITING	(206) 555-8745	987 2ND ST	TACOMA	98402	
<input type="checkbox"/>	Select	ABC AUTO	(253) 555-1212	234 F ST	TACOMA	98404	
<input checked="" type="checkbox"/>	Select 602121880	ABC AUTO BODY CENTEF	(360) 698-4030	4875 GUFSTAFSON RD	SILVERDALE	98383	
<input checked="" type="checkbox"/>	Select 602121880	ABC AUTO BOYX CARS IN	(509) 534-2256	5915892 E APPLEWAY	GREENACRES	99016	
<input checked="" type="checkbox"/>	Select 659875630	ABC AVIONICS	(509) 734-5987	1234 HWY 1-90	MOSES LAKE	98837	

Click

Step 5 The selected Primary Employer is on the left of the screen.

Note: Use the arrows to replace a piece(s) of the Primary with a piece of the Duplicate. The upper portion of the right side (employer data records) deletes after the Merge, not Merged.

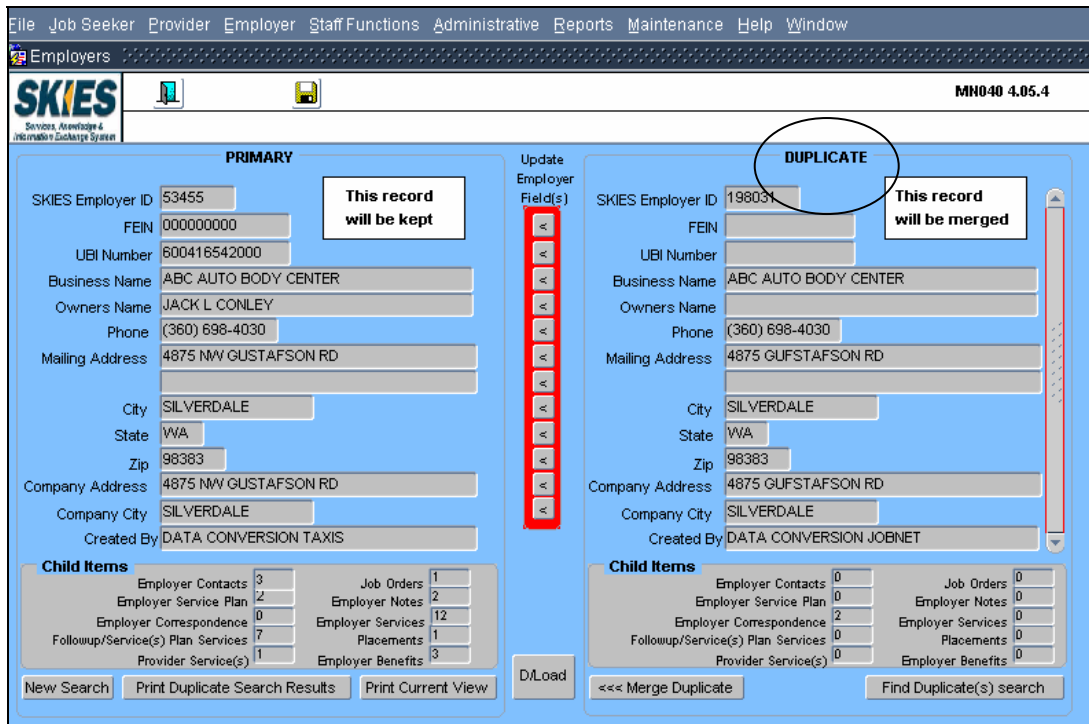
Step 5 Click > FIND DUPLICATE(S) SEARCH button on the right side of the screen. The **Match Employer Record(s) by** screen displays. Use the listed criteria to search. Review Matching Employer records to determine if the records should merge.

Step 6 Click in the check box (check mark):

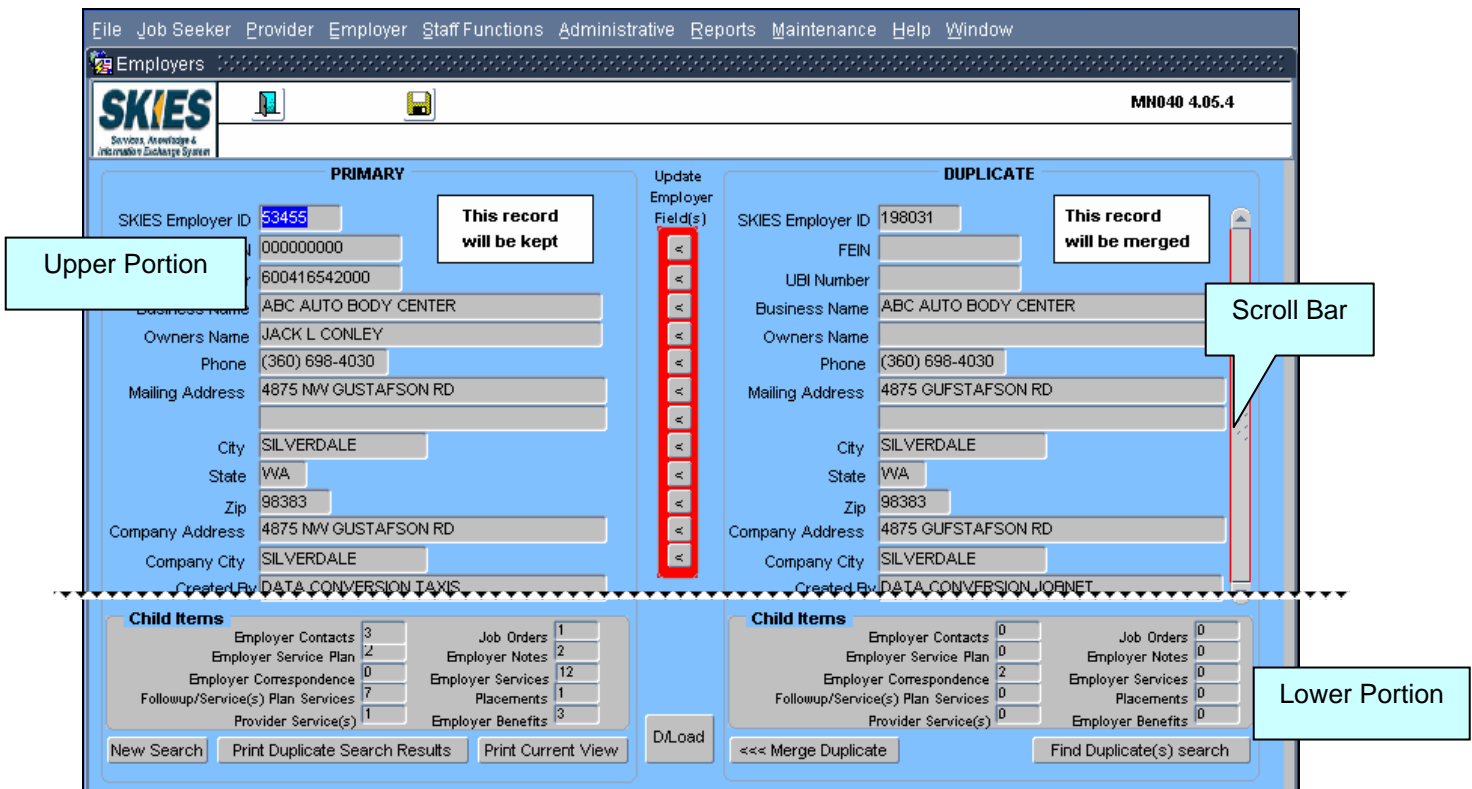
The image shows two versions of a search form titled "Search for Duplicate Employer Record(s) by". The form contains several input fields, each with a checkbox to its left. In the left version, all checkboxes are unchecked. In the right version, the checkbox for "Business Name" is checked, and the text "ABC AUTO BODY CENTER" is entered in the Business Name field. A callout box labeled "Check Box" points to the checked checkbox. At the bottom of each form are three buttons: "Return", "Clear All", and "Execute Query".

- Search by UBI when the Primary Employer has a UBI.
- Use the wild card (%) to search by Employer Name, City, and County. Mailing and Company Addresses are case sensitive.
- Check mark a data field and enter nothing, the search is based on the item for the Primary Employer - or - check mark the data field and enter the search data using free form text, except for UBI.
- Select the check mark data field. When there is no information in the corresponding data field, the item auto-fills with corresponding information on the Primary Employer.
- The CLEAR ALL button clears all search criteria.
- The EXECUTE QUERY button searches for matching records based on the entered search criteria.
- The RETURN button returns the User to the **Merge** screen without searching.

Step 6 Enter the Search data. Click > EXECUTE QUERY button to search for matching records based on the selected search criteria. The search returns records matching all entered search criteria.



Step 7 When you find a match, (there may be several matches), the system takes you to the **Merge** screen. The match displays on the Duplicate (right) side of the screen.



- Duplicate Employers display one at a time on the Duplicate side. A scroll bar activates when there is more than one Duplicate Employer.

- The upper portion of each side displays elements of the Employer data record.
- The lower portion of each side displays counts of each data field attached to either the displayed Primary Employer or Duplicate Employer.
- Review and determine if the Duplicate Employer record should merge into the Primary Employer record.

*Note: The Primary Employer and the Duplicate Employer may have the same benefit(s). Merge will only add the benefits to the Primary Employer that the Primary Employer does not already have attached. For this reason, the Primary Employer benefits count after the merge may not always be equal to the Primary plus the Duplicate.*

*Note: Click > NEW SEARCH button in the lower portion of the Primary side to return to the **Employer Merge - Locate Primary Employer** screen to search for another target Employer.*

Step 8 Click > MERGE DUPLICATE button. A pop-up asks “Are you sure you want to Merge Employer Records?” Click > YES. The displayed Duplicate Employer on the right merges with the Primary Employer on the left. When the merge is complete, numbers on the Primary side adjust accordingly and the merged Duplicate Employer clears from view, it no longer exists.

Step 9 In the middle of the screen, under Update Employer Field(s), are arrow buttons pointing from the Duplicate side to the Target side. Each button corresponds to an item displayed on the Employer data record. Data fields on the Primary side do not allow entry of free form text. To update the Employer data record on the Primary Employer with an item in Duplicate Employer, the arrows are used to copy from the Duplicate to the Primary. Click to select an item(s). Click > Save.

*Note: You cannot enter free form text into the data fields until the check box is selected (check mark).*

*The Print button displays (in Adobe Reader) the Primary Employer (with the counts) and the Duplicate Employer (with the counts) in view. This print out may be used to document the counts before and after a Merge.*

The screenshot displays the SKIES software interface for comparing two employer records. The interface is split into two columns: 'PRIMARY' and 'DUPLICATE'. The 'PRIMARY' record has a SKIES Employer ID of 53455 and is marked 'This record will be kept'. The 'DUPLICATE' record has a SKIES Employer ID of 198031 and is marked 'This record will be merged'. Both records share the same business name, 'ABC AUTO BODY CENTER', and address. A central 'Update Employer Field(s)' column contains a vertical stack of '<' buttons, with a callout 'Update Employer (buttons)' pointing to them. Below the main record fields are two 'Child Items' sections, each with a grid of fields and values. At the bottom, a 'Buttons' callout points to a row of buttons including 'New Search', 'Print Duplicate Search Results', 'Print Current View', 'D\Load', '<<< Merge Duplicate', and 'Find Duplicate(s) search'.

Step 10 Click > Door to exit.

Employer Merge

Employer Merge – Locate Primary Employer	
Employer Name	Enter the name of the Employer or use at least three alpha characters and wild card(s).
Phone	Enter the 10 digit phone number in XXXXXXXXXX format, no dots, dashes, or slashes.
City	Enter the name of the City.
County	Enter the name of the County.
ZIP	Enter the five digit ZIP Code.
UBI Number	Enter the UBI Number.
SKIES Employer ID	Enter the SKIES Employer ID Number.
TAXIS Records	Click to select only TAXIS created records.
SKIES Records	Click to select only records created by a User.
EXECUTE QUERY button	Click for a list of Employers(s).
Search for Duplicate Employer Record(s) by	
Business Name	Click to select when attempting to find duplicate records.
Owners Name	Click to select when attempting to find duplicate records.
Mailing Address	Click to select when attempting to find duplicate records.
Mailing City	Click to select when attempting to find duplicate records.
Company Address	Click to select when attempting to find duplicate records.
Company City	Click to select when attempting to find duplicate records.
Phone	Click to select when attempting

	to find duplicate records.
SKIES Employer ID	Click to select when attempting to find duplicate records.
UBI Number	Click to select when attempting to find duplicate records.
RETURN button	Click to return to the previous screen.
CLEAR ALL button	Click to clear all search criteria.
EXECUTE QUERY button	Click to find duplicate Employer(s).
Merge Data Field(s) – Primary & Duplicate	
SKIES Employer ID	
FEIN	
UBI Number	
Business Name	
Owner's Name	
Phone	
Mailing Address	
City	
State	
ZIP	
Company Address	
Company City	
Created By	
<b>Child Items</b>	
Employer Contacts	
Employer Services Plan	

Employer Correspondence	
Followup/Service(s) Plan Services	
Provider Services	
Job Orders	
Employer Notes	
Employer Services	
Placements	
Employer Benefits	
NEW SEARCH button	Click to return to the <b>Employer Merge – Locate Primary Employer</b> screen.
PRINT DUPLICATE SEARCH RESULTS button	Click. Activates Adobe Reader with Primary and Duplicate Employer data. Click > PRINT icon.
PRINT CURRENT VIEW button	Click. Activates Adobe Reader with Primary, Duplicate and Child items. Click > PRINT icon.
<<< MERGE DUPLICATE button	Click. “Are you sure you want to Merge Employer record(s)?” Click > YES or NO.
FIND DUPLICATE SEARCH button	Click. The Duplicate record displayed merges with the Primary record.
UPDATE EMPLOYER FIELD(s) (buttons with arrows)	Click to update Primary Employer information with Duplicate Employer information, one data field at a time.