



Change Request: Employer Merge (Track Record 2266)

Now:

Duplicate Employer records in SKIES cause problems. Version 3 Enhancements made the duplicate records more apparent. Some records carried-over in conversion (JobNet to SKIES), some are due to a slight name change, and in some instances, Users created unique records to simply identify Employers within their WorkForce Development Area (WDA).

The state Business Services Team (BST) identified a second issue. Any User with a Staff Role can create an Employer record in SKIES. As a result, information on an Employer may be spread throughout multiple records instead of being attached to one or fewer records. It is difficult for Staff to find a common record to attach information. It is also difficult for Staff to view the full picture of services or interactions with the Employer when the information is spread throughout several records. And, analysis of the Employers being served is challenging.

What's New?

The state BST submitted a Change Request for each local WorkForce Development Area (WDA) to manually Merge Employer records. The BST also requested a new security role assignment to Users who will manually Merge duplicate Employer records.

Merging SKIES-created records will decrease the numbers of records, confusion, and inaccuracies. However, Change Request - Employer Merge (Track Record 2266) has limitations based on creation of the original Employer record:

- SKIES (manually created) to TAXIS can Merge.
- SKIES (manually created) to SKIES (manually created) records can Merge.
- TAXIS to TAXIS records cannot Merge.
- TAXIS to SKIES (manually created) records cannot Merge.
- Go2WorkSource.com (WS) or America's Job Bank (AJB) records cannot Merge.
- There is no method to "undo" a Merge.

If Change Request - Merge Employer (Track Record 2266) is not put into action, the number of records identifying the correct Employer record will take more and more more time. Data from the Employer record will not be accurate or relevant.

Change Request-Employer Merge (Track Record 2266) offers major benefits. The requested change offers local control. Accuracy and security of Employer records will be enhanced. Users will save time because of less confusion and fewer Employer records.

Change Request - Employer Merge (Track Record 2266) includes:

- Merge is selected through Maintenance > Merge Duplicate Employer.
- The Primary Employer remains after the Employer Merge.
- The Duplicate Employer does not remain after the Employer Merge.
- A new security role, Employer_Merge, will be assigned through the security process.

- The Duplicate Employer records attach to the Primary Employer after an Employer Merge. The Duplicate Employer record is removed from the Employer data when Merge is complete. The Primary Employer and the Duplicate pre-Merge records are kept in the history files after an Employer Merge.

Caution

Note: Please review the following items when considering a Merge. Communication is essential!

No "Undo"?

Employer Merge does not have the ability to 'undo' a Merge. Merge deletes the Duplicate Employer and attaches to the Primary Employer. The Employer_Merge security role User has a big responsibility to perform this function accurately. An enormous dependency on communication and coordination is required prior to merging. Offices using an Employer record considered for merging should be part of the decision to Merge or not to Merge.

Who is using the record?

The office attached to the Employer record should not be the only consideration for "who's" using the record. Several offices may record contacts, create job orders and make referrals, record Employer services, and enter notes. The entries attached to the Employer point to the office that created the entries. All records (entries) attached to an Employer should be considered when identifying "who's" using the records. Currently, only one office can attach to an Employer record. However, in the near future multiple offices will attach to an Employer record.

Duplicate Employer is a Provider?

A Provider is also an Employer behind the scenes because Providers and Employers share the same data base. For this reason, Employer Merge must consider areas in SKIES where the Employer is used as a Provider. The obvious impact is through Job Seeker > Service(s) Plan > Services tab or Follow Up > Service Plan > Services tab. Both areas allow selection of a Provider to attach to a service. When a Merged Employer (Provider) attaches to a service in either area, the name of the Provider changes to the Primary Employer. The Employer Merge screen will indicate when the selected Employer is attached to a Provider service.

Never Ending Lists?

When Employer B Merges to Employer A, all records from Employer B move to Employer A. For example, if Employer B with 20 Job Orders Merges with Employer A with 20 Job Orders, Employer A now has 40 Job Orders.

When Merge creates a long list, the User may use many ways to search and sort to narrow the list. For example, instead of selecting an Employer and going to the Job Order Summary tab, a search by Job Order Number or Binoculars > Job Order and using Job Order Status will reduce the number of Job Orders for selection.

Since Users have many records to filter, they should be considered and included in any communication regarding a Merge. Merging is beyond data and can be a good thing as long as there is consideration of Users as well as records.

GMAP Reporting?

Employer Merge will impact one GMAP measure. **Employer Market Share** is the percent of the market for Employers with hires during the past 12 months. When two Employers included in performance measures Merge, only one employer record counts because only one employer record exists after the Merge. Employer Market Share has not been identified as a reason NOT to Merge. The development of Employer Merge included communication

with and the impact on WorkSource Operations Division. However, local WDAs need to communicate within their area.

Local Reporting?

Reports may track local Employers. If merging Employer records reduces numbers in a local area, Users who create and run reports, and review the numbers should be part of the communication.

Employer Address, Phone, Email, and FAX Numbers?

An Employer record can support one mailing address, one company address, one email address, one phone number, and one FAX number. One Employer record may have many Employer Contacts. Employer Contact information may include a contact name, address, phone number, FAX number, and email for each contact. Users may consider using the Employer Contact area to record information when more than one office chooses to share an Employer record. There may be different contacts or contact information depending on the office. When Merged, Employer Contact data added to the Primary Employer will be lost.

TAXIS Records: Information?

The Employment Security TAXIS system collects Unemployment Insurance taxes from Washington State Employers including address information with the purpose of where to send tax related correspondence. SKIES receives Employer records from TAXIS and often the mailing address is out-of-state. Sometimes a User updates the mailing address to where they want to send correspondence for a different reason. Currently, TAXIS addresses replace SKIES addresses. Local WDAs may consider using the Employer Contacts to record address information that is not updated by the interface with TAXIS.

TAXIS Records: Multiples?

The Employment Security TAXIS system collects Unemployment Insurance taxes from Washington State Employers, including information on locations of covered TAXIS accounts. SKIES receives a separate Employer record for each location of a TAXIS Employer. For example, if Employer "A" has five different Employer "A" locations, SKIES has five different Employer "A" records, each representing a different physical location. There may be several records within the same city.

Areas should give consideration when discussing which "Primary Employer" should Merge and when selecting which records to Merge into the Primary Employer. TAXIS records cannot Merge into TAXIS records, however, SKIES created or Job Net Conversion records can Merge into a TAXIS Employer. So, should records Merge into a TAXIS Employer based on the physical address? Or, does your WDA want to use a single TAXIS Employer.

Maintenance – Employer Merge

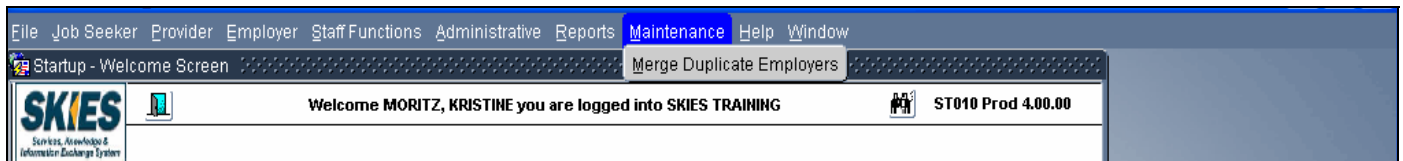
SKIES training and access is based on User Roles (Profiles). For each User Role there is a minimum of training required prior to receiving access to SKIES. Training does not address or define User Roles or responsibilities but does address levels of User access within SKIES.

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 will 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.

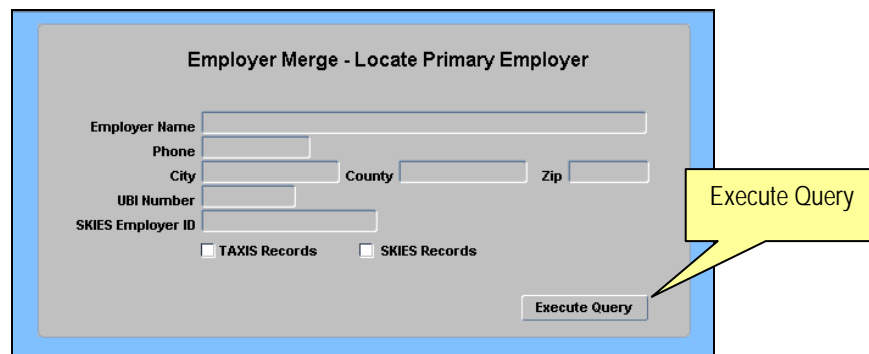
Start SKIES Welcome Screen

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. This screen is used to query and select Employer record(s) to keep (Primary). Enter the desired search criteria. Click > Execute Query.

A screenshot of the 'Employer Merge - Locate Primary Employer' screen. It features several search fields: 'Employer Name', 'Phone', 'City', 'County', 'Zip', 'UBI Number', and 'SKIES Employer ID'. Below these fields are two checkboxes: 'TAXIS Records' and 'SKIES Records'. An 'Execute Query' button is located at the bottom right. A yellow callout box with the text 'Execute Query' points to the button.

When a search returns one Employer, the information displays. When a search returns multiple Employers, click to select the desired Employer. You can work on only one Primary Employer at a time.

Step 4 When the Primary Employer is selected, this screen displays.

The left of the screen is data related to the selected Primary Employer.

The right of the screen is for the Duplicate Employer. The child items on the right Merge into the Primary Employer record.

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

The screenshot shows the SKIES Employers interface. The Primary Employer record is on the left, and the Duplicate Employer record is on the right. A vertical column of arrows is highlighted in red between the two records. A callout box points to the top arrows with the note: "Use the upper arrows to replace a piece(s) of the Primary with that of the Duplicate. The upper portion of the right side (which is the employer data records) deletes after the Merge, not Merged." The "Find Duplicate(s) search" button is circled in the bottom right.

Step 5 Click > 'Find Duplicate(s) search' button on the Duplicate Employer side of the screen. The 'Match Employer Record(s) by' screen displays. You may use several of the listed criteria to search. Review Matching Employer records to determine if they should Merge into the Primary Employer.

Click in the check box (check mark):

The left screenshot shows the "Search for Duplicate Employer Record(s) by" screen with all checkboxes unchecked. The right screenshot shows the same screen with the "Business Name" checkbox checked and the value "ABC AUTO BODY CENTER" entered. A yellow callout box labeled "Check Box" points to the checked checkbox.

- UBI is available for search when the Primary Employer has a UBI.
- You may use the wild card (%) to search by Employer Name, City, and County. Mailing and Company Addresses are case sensitive.
- If you check mark a data field and do not enter anything, the search is based on the item for the Primary Employer - or - you can check mark the data field and enter the search data using free form text, except for UBI.
- When the check box is selected and 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.

The screenshot shows the SKIES Employers interface with two records side-by-side. The left record is the 'PRIMARY' record (SKIES Employer ID 53455) and the right is the 'DUPLICATE' record (SKIES Employer ID 19803). Both records have identical data: FEIN 000000000, UBI Number 600416542000, Business Name ABC AUTO BODY CENTER, Owners Name JACK L CONLEY, Phone (360) 698-4030, Mailing Address 4875 NW GUSTAFSON RD, City SILVERDALE, State IWA, Zip 98383, Company Address 4875 NW GUSTAFSON RD, Company City SILVERDALE, and Created By DATA CONVERSION TAXIS. The Primary record has a 'Child Items' section with values: Employer Contacts 3, Employer Service Plan 2, Employer Correspondence 0, Followup/Service(s) Plan Services 7, Provider Service(s) 1, Job Orders 1, Employer Notes 2, Employer Services 12, Placements 1, and Employer Benefits 3. The Duplicate record has all 'Child Items' set to 0. A vertical column of red arrows points from the Primary record fields to the Duplicate record fields. A 'DUPLICATE' label is circled in red above the Duplicate record. At the bottom, there are buttons for 'New Search', 'Print Duplicate Search Results', 'Print Current View', 'D/Load', '<<< Merge Duplicate', and 'Find Duplicate(s) search'.

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'. 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 will 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.

Primary Employer

SKIES Employer ID: 53455
FEIN: 000000000
UBI Number: 600416542000
Business Name: ABC AUTO BODY CENTER
Owners Name: JACK L CONLEY
Phone: (360) 698-4030
Mailing Address: 4875 NW GUSTAFSON RD
City: SILVERDALE
State: WA
Zip: 98383
Company Address: 4875 NW GUSTAFSON RD
Company City: SILVERDALE
Created By: DATA CONVERSION TAXIS

Update Employer Field(s)

Duplicate Employer

SKIES Employer ID: 198031
FEIN:
UBI Number:
Business Name: ABC AUTO BODY CENTER
Owners Name:
Phone: (360) 698-4030
Mailing Address: 4875 GUFSTAFSON RD
City: SILVERDALE
State: WA
Zip: 98383
Company Address: 4875 GUFSTAFSON RD
Company City: SILVERDALE
Created By: DATA CONVERSION JOBNET

Child Items

Category	Count
Employer Contacts	3
Employer Service Plan	2
Employer Correspondence	0
Followup/Service(s) Plan Services	7
Provider Service(s)	1
Job Orders	1
Employer Notes	2
Employer Services	12
Placements	1
Employer Benefits	3

Buttons

New Search | Print Duplicate Search Results | Print Current View | D\Load | <<< Merge Duplicate | Find Duplicate(s) search

Employer Merge

Employer Merge – Locate Primary Employer	
Employer Name	Using free form text, 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	Using free form text, enter the name of the City.
County	Using free form text, 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 record created by a User.
Execute Query	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	
Child Items	
Employer Contacts	
Employer Service 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 Employer Merge – Locate Primary Employer 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(s) 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.