

Beyond - How to Merge Employee Records

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Overview

Like within Enterprise, you have the ability to merge duplicate employee records within Beyond.

While the process to merge employee records remains similar between Enterprise and Beyond, there are some differences to highlight.

Note For more information on the merging process within Enterprise, please see the following Knowledge Base article titled "[How to Merge Employee Records](#)".

How to Merge Employee Records

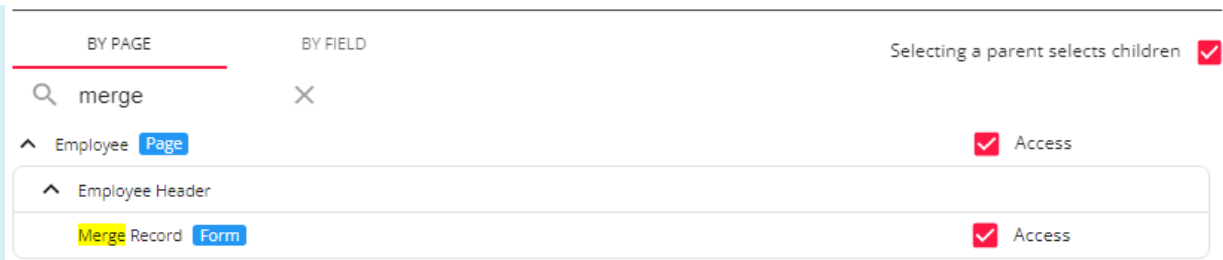
Employee records in Beyond are able to be merged via two methods:

- [Employee record](#)
- [Employee search results](#)

Note Throughout this article, the terms "Source" and "Target" will be used. These terms relate to the type of employee record that is being utilized within the merging process:

- **Source:** The employee record that has the information to be transferred to the "Target" record and will be deactivated.
- **Target:** The employee record that will be updated with the information from the "Source" record and will remain active.


Note If you utilize custom Security Groups with Advanced Permissions, you will need to add the Access to the "Merge Record" form within Employee > Employee Header > Merge Record to the Security Groups that require the functionality:



For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

Employee Record Method


Begin by navigating to the employee record that you would like to be merged.

Within the employee record, select the "Merge Record" charm or, if the charm does not appear within the header, select the  icon and select the "Merge Record" charm.


Within the "Merge Record" window, you are now able to search for the additional employee record for the merge. For this example, we will be searching for another employee with the last name of "Abbott":

Merge Record



1 Select Record — 2 Profile Information — 3 Contact Methods — 4 Merge Options

 Employees on active assignments are not shown in the search results, since you cannot merge 2 employees on active assignments.

Select a record to merge with. The older record will be set as the one to merge into (you can swap positions in the next step).

Last: First: Govt ID: Id: 

Search returned 61 results

1 selected item  [Clear Selection](#) 

	Employee Id	First Name	Last Name	Branch	Govt ID	City
<input checked="" type="radio"/>	4295052071	Sherlyn	Abbott	High Tech NE	111223333	City
<input type="radio"/>	4296165401	Solomon	Abbott	High Tech NE		City

Note Keep the following points in mind when searching for employee records to merge:


- When starting with an "Unassigned" employee record, the employees provided within the merging search can be both "Unassigned" and "Assigned".
- When starting with an "Assigned" employee record, the employees provided within the merging search will be only "Unassigned".

Employees on active assignments are not shown in the search results, since you cannot merge 2 employees on active assignments.


Select the additional employee record you want for the merge and select "Next":

Merge Record



1 Select Record — 2 Profile Information — 3 Contact Methods — 4 Merge Options

 Employees on active assignments are not shown in the search results, since you cannot merge 2 employees on active assignments.

Select a record to merge with. The older record will be set as the one to merge into (you can swap positions in the next step).

Last: Abbott First: S Govt ID: Id: 

Search returned 61 results

1 selected item  Clear Selection 

	Employee Id	First Name	Last Name	Branch	Govt ID	City
<input checked="" type="radio"/>	4295052071	Sherlyn	Abbott	High Tech NE	111223333	City
<input type="radio"/>	4296165401	Solomon	Abbott	High Tech NE		City
<input type="radio"/>	4296130925	Solomon	Abbott	High Tech NE		City
<input type="radio"/>	4296096449	Solomon	Abbott	High Tech NE		City
<input type="radio"/>	4296061973	Solomon	Abbott	High Tech NE		City
<input type="radio"/>	4296027497	Solomon	Abbott	High Tech NE		City
<input type="radio"/>	4295993021	Solomon	Abbott	High Tech NE		City
<input type="radio"/>	4295958545	Solomon	Abbott	High Tech NE		City

CANCEL **NEXT >**

Note Once the "Merge Record" option has been selected, you will need to validate which record is being shown as the "Source" (Left) and which is shown as the "Target" (Right).

The older employee record will be set as the "Target" record unless that employee is currently assigned. This can be swapped by selecting the "Swap" option within the "Merge Record" window:

Merge Record


Select Record — Profile Information — Contact Methods — Merge Options

Verify information. Changes that you make will be applied after the merge is complete.

This record will be updated and deactivated This record will be updated

Employee Id: 4295052071 **Swap** Employee Id: 5412
Employee Status: Eligible for Hire Employee Status: Eligible and Active

The "Swap" option will not work when attempting to merge from an employee record that has active assignments.

For all the information that you want transferred to the "Target" employee record, select the  icon for each item:

Merge Record

1 Select Record — 2 Profile Information — 3 Contact Methods — 4 Merge Options

Verify information. Changes that you make will be applied after the merge is complete.

This record will be updated and deactivated | This record will be updated

Employee Id: 4295052071 | Employee Status: Eligible for Hire | Swap | Employee Id: 5412 | Employee Status: Eligible and Active

Field	Source (4295052071)	Target (5412)
First Name	Sherlyn	Sam
Last Name	Abbott	Abbott
Street	101 191st Street West	101 191st Street West
Street 2		
City	City	Baton Rouge
State	Louisiana	Louisiana
Zip Code	11223	11223
Branch	High Tech NE	High Tech NE

CANCEL < PREVIOUS NEXT >

Note As a tip, you can add "zz" directly to the first and/or last name of the "Source" employee record that will be deactivated once the merge is complete:

Merge Record

1 Select Record — 2 Profile Information — 3 Contact Methods — 4 Merge Options

Verify information. Changes that you make will be applied after the merge is complete.

This record will be updated and deactivated | This record will be updated

Employee Id: 4295052071 | Employee Status: Eligible for Hire | Swap | Employee Id: 5412 | Employee Status: Eligible and Active

Field	Source (4295052071)	Target (5412)
First Name	zzSherlyn	Sam
Last Name	zzAbbott	Abbott

This will make the now deactivated employee record appear at the bottom of search results.

Once all of the information has been verified, select "Next" to continue:

Merge Record

1 Select Record — 2 Profile Information — 3 Contact Methods — 4 Merge Options

Verify information. Changes that you make will be applied after the merge is complete.

This record will be updated and deactivated		This record will be updated	
Employee Id: 4295052071	Employee Status: Eligible for Hire	Employee Id: 5412	Employee Status: Eligible and Active
First Name zzSherlyn	Last Name zzAbbott	First Name Sam	Last Name Abbott
Street 101 191st Street West	Street 101 191st Street West	Street 101 191st Street West	Street 101 191st Street West
Street 2	Street 2	Street 2	Street 2
City City	City Baton Rouge	City Baton Rouge	City Baton Rouge
State Louisiana	Zip Code 11223	State Louisiana	Zip Code 11223
Branch High Tech NE	Branch High Tech NE	Branch High Tech NE	Branch High Tech NE

CANCEL < PREVIOUS **NEXT >**

Note If you have address standardization enabled within your system, you will be presented with an additional "Address Standardization" window to select the intended address for the merge.

Note If you have a custom method for merging employee records, you will now be prompted to choose whether you would like to use the standard method or your custom method:

The screenshot shows a modal dialog box titled "Merge Record" with a progress bar at the top. The progress bar has five steps: 1. Select Record (checked), 2. Profile Information (checked), 3. Custom Procedure (active), 4. Contact Methods, and 5. Merge Options. Below the progress bar, the text reads: "Custom merge procedure is available. Please choose an option to continue." There are two radio button options: "Continue merge with standard options" (selected) and "Continue merge with custom procedure". At the bottom right, there are buttons for "CANCEL", "< PREVIOUS", and "NEXT >".

If you would like a custom method for merging employee records, please contact [TempWorks Support](#).

You will now be able to select Contact Methods to merge, if any, from the "Source" record to the "Target" record:

Merge Record

Select Record — Profile Information — 3 Contact Methods — 4 Merge Options

Select contact methods to merge. Selected contact methods will replace current contact methods.

Phone

Cell Phone

(555) 666-7788
Employee Id: 4295052071

(651) 636-0636 ext. 123
CURRENT Employee Id: 5412

Email

Email

TempWorksTest@gmail.com
Employee Id: 4295052071

imapaccount@gmail.com
CURRENT Employee Id: 5412

CANCEL < PREVIOUS NEXT >

Select the Contact Methods to merge, keeping in mind that selected contact methods will replace "current" contact methods, and select "Next":

Merge Record

Select Record — Profile Information — 3 Contact Methods — 4 Merge Options

Select contact methods to merge. Selected contact methods will replace current contact methods.

Phone

Cell Phone

(555) 666-7788
Employee Id: 4295052071

(651) 636-0636 ext. 123
CURRENT Employee Id: 5412

Email

Email

TempWorksTest@gmail.com
Employee Id: 4295052071

imapaccount@gmail.com
CURRENT Employee Id: 5412

CANCEL < PREVIOUS **NEXT >**

The final section of the merge process is the "Merge Options". This section allows you to select the following information to merge from the "Source" record to the "Target" record:

- Professional Experience (Work History, References, Education, Interviews)
- Assignments & Pay History (Accrual History, Check History)
- Interest Codes
- Documents (Includes Required Documents)
- Custom Data Fields (Only fields that do not exist in the "Target" record will be merged)
- Messages

Note While not directly listed within the "Merge Options", the basic tax setup information (Beyond >

Employee > Pay Setup > Basic Tax Setup) of the "Source" employee record will be merged to the "Target" record:

^ Basic Tax Setup			
Federal Exemptions	1	State Exemptions	1
Federal Additional Withholding	0.00	Dependents	0
Marital Tax Status	Single	Tax State	MN
State Juris	--	County Tax	--
Exempt from County Tax	No	City Tax	--
Exempt from City Tax	No	School Tax	--
Exempt from School Tax	No		

Merge Record

Select Record — Profile Information — Contact Methods — Merge Options

Select items you want to include in the merge. If checked, they will be added to the primary record (Sam Abbott).

- | | |
|---|--|
| <input type="checkbox"/> Professional Experience
Work History, References, Education, Interviews | <input type="checkbox"/> Custom Data Fields
Only fields that do not exist in the primary record will be moved |
| <input checked="" type="checkbox"/> Assignments & Pay History
Accrual history, Check history | <input checked="" type="checkbox"/> Messages |
| <input type="checkbox"/> Interest Codes | |
| <input type="checkbox"/> Documents
Includes Required Documents | |



Remember that pay set up, invoicing, year end items will not be merged. If needed, manually update this information on the account after the merge.

- Add task for Sam Abbott
Automatically add a reminder to follow-up on the record

CANCEL < PREVIOUS MERGE

Note If the "Source" record contains information from the above categories, those categories will be automatically selected to be merged.

If the "Source" record does not contain any information from the above categories, those categories will be automatically unchecked and unable to be selected.

Note You also have the ability to create a task for the "Target" record to follow-up on information that is unable to be merged, including:

- Pay setup (excluding Basic Tax Setup)
- Invoicing
- Year End items

Remember that pay set up, invoicing, year end items will not be merged. If needed, manually update this information on the account after the merge.



Add task for Sam Abbott

Automatically add a reminder to follow-up on the record

Once all of the categories have been checked, select "Merge" to complete the employee merge process:

Merge Record



Select Record



Profile Information



Contact Methods



Merge Options

Select items you want to include in the merge. If checked, they will be added to the primary record (Sam Abbott).



Professional Experience

Work History, References, Education, Interviews



Custom Data Fields

Only fields that do not exist in the primary record will be moved



Assignments & Pay History

Accrual history, Check history



Messages



Interest Codes



Documents

Includes Required Documents

Remember that pay set up, invoicing, year end items will not be merged. If needed, manually update this information on the account after the merge.



Add task for Sam Abbott

Automatically add a reminder to follow-up on the record

CANCEL

< PREVIOUS

MERGE

Employee Search Results Method

Begin by navigating to the "Employee Search" and conduct the search for the employees to be merged:

BASIC						ADVANCED					
Last Name	First Name	Employee Id	Government Id	Assigned	Status	Branch	Service Representative	Employee Id	Government Id	Assigned	Status
Cagee	First			Unassigned	Active	All	All				

Search returned 2 results

<input type="checkbox"/>	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
<input type="checkbox"/>	4295105069	Cagee	Luke	St.Paul	✓			55126-2929	✓	(922) 333-4329	(612) 555-85
<input type="checkbox"/>	4295105140	Cagee	Luke	St.Paul	✓			55416	✓		9224222818

Rows per page: 100 1-2 of 2 < 1 >

Note When selecting records to merge within Search results, one of the records will need to be

"Unassigned".

After the search has returned results, select one of the employees from the list:

The screenshot shows a search interface with two tabs: 'BASIC' and 'ADVANCED'. The 'BASIC' tab is active, showing search criteria: Last Name (Cagee), First Name (First), Employee Id, Government Id, Assigned (Unassigned), Status (Active), Branch (All), and Service Representative (All). A 'SEARCH' button is visible. Below the search criteria, it says 'Search returned 2 results'. A dropdown menu shows '1 selected employee' and a 'Clear Selection' link. Below this is a table of results:

<input type="checkbox"/>	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
<input checked="" type="checkbox"/>	4295105069	Cagee	Luke	St.Paul	✓			55126-2929	✓	(922) 333-4329	(612) 555-85
<input type="checkbox"/>	4295105140	Cagee	Luke	St.Paul	✓			55416	✓		9224222818

At the bottom right, it says 'Rows per page: 100' and '1-2 of 2'.

Select the dropdown within the "1 selected employee" button and select "Merge Record":

This screenshot is similar to the previous one, but the dropdown menu for the '1 selected employee' button is open. The 'Merge Record' option is highlighted with a red box. The dropdown menu contains the following options:

- Email
- Log Message for 1 Recipients
- Make Candidate
- Make Job Offer
- Assign
- Merge Record**
Select up to 2 records to merge

Below the dropdown menu, there are sections for 'Onboarding' with sub-sections: 'Assign a New Workflow...' and 'Assign Pages Ad Hoc...'.

Note The merging process can be completed by following the same instructions listed [above](#).

Additionally, you have the option of selecting up to 2 employee records within the search results to merge.

After the search has returned results, select two of the employees from the list:

BASIC ADVANCED

Last Name Cagee	First Name First	Employee Id	Government Id
Assigned Unassigned	Status Active	Branch All	Service Representative All

RESET SEARCH

Search returned 2 results

2 selected employees Clear Selection 📄

<input checked="" type="checkbox"/>	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
<input checked="" type="checkbox"/>	4295105069	Cagee	Luke	St.Paul	✓			55126-2929	✓	(922) 333-4329	(612) 555-85
<input checked="" type="checkbox"/>	4295105140	Cagee	Luke	St.Paul	✓			55416	✓		9224222818

Rows per page: 100 1-2 of 2 < 1 >

Select the dropdown within the "2 selected employees" button and select "Merge Record":

BASIC ADVANCED

Last Name Cagee	First Name First	Employee Id	Government Id
Assigned Unassigned	Status Active	Branch All	Service Representative All

RESET SEARCH

Search returned 2 results

2 selected employees Clear Selection 📄

- Email 2 Recipients
- Log Message for 2 Recipients
- Make Candidates
- Make Job Offers
- Assign
- Merge Record
Select up to 2 records to merge
- Onboarding**
- Assign a New Workflow...
- Assign Pages Ad Hoc...

<input checked="" type="checkbox"/>	Employee Id	Last Name	First Name	Branch	Is Active	Is Assigned	Last Message	ZIP	Resume on file	Phone	Cell Phone
<input checked="" type="checkbox"/>	4295105069	Cagee	Luke	St.Paul	✓			55126-2929	✓	(922) 333-4329	(612) 555-85
<input checked="" type="checkbox"/>	4295105140	Cagee	Luke	St.Paul	✓			55416	✓		9224222818

Rows per page: 100 1-2 of 2 < 1 >

Note Once the "Merge Record" option has been selected, you will need to validate which record is being shown as the "Source" (Left) and which is shown as the "Target" (Right).

The older employee record will be set as the "Target" record unless that employee is currently assigned. This can be swapped by selecting the "Swap" option within the "Merge Record" window:

Merge Record

1 Profile Information — 2 Address Standardization — 3 Contact Methods — 4 Merge Options

Verify information. Changes that you make will be applied after the merge is complete.

This record will be updated and deactivated

Employee Id: 4295105140
Employee Status: Eligible and Active

This record will be updated

Employee Id: 4295105069
Employee Status: Web Pending

Swap

The "Swap" option will not work when attempting to merge from an employee record that has active assignments.

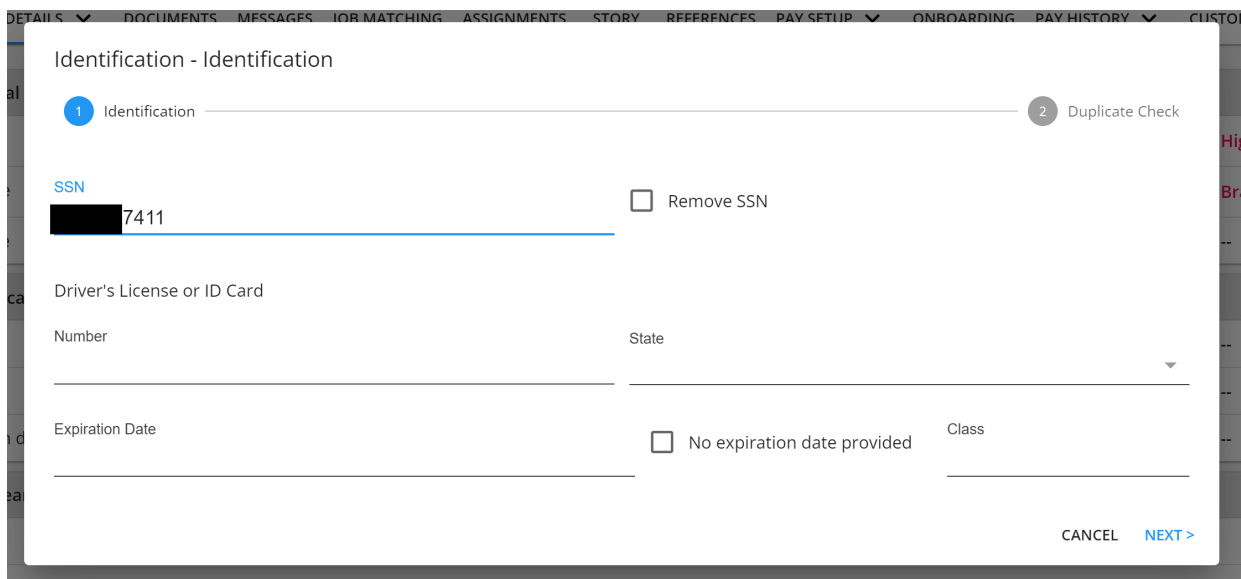
Note The merging process can be completed by following the same instructions listed [above](#).

Employee Duplicate Checking Method

Note This functionality is being released in waves between April 28th, 2023 and July 31st, 2023. Therefore, you may not see this functionality while the backend work is being completed for your environment.

If you still do not see this functionality by August 1st, 2023, please contact your TempWorks Account Manager.

When editing an employee's SSN, in the event the last 4 of the SSN entered match another record within your system, select "Next" to open the "Duplicate Check" window:



The screenshot shows a web application interface for editing an employee's identification information. The title is "Identification - Identification". A progress bar at the top indicates two steps: "1 Identification" (active) and "2 Duplicate Check" (selected). The "SSN" field contains a masked number "7411" with a "Remove SSN" checkbox. Below this are fields for "Driver's License or ID Card", including "Number", "State" (a dropdown menu), "Expiration Date", "No expiration date provided" (checkbox), and "Class". At the bottom right, there are "CANCEL" and "NEXT >" buttons.

With the "Duplicate Check" window open, this will allow you to merge the employee records with the similar SSN's, or simply apply the intended SSN update to the employee record:

IGNMENTS PROSPECTS

Identification - Duplicate Check

✓ Identification 2 Duplicate Check

2 employees are potential duplicates of the selected employee, based on the last name and last 4 digits of SSN. Choose to update the selected employee or merge with a matching employee.

Employee Selected		Matching Records
<p>Sarah Alaska 4296220855 (888) 333-3333 mail@mail.com SSN: ████████7411</p> <p style="text-align: center;">SUBMIT UPDATE</p>		<p>Baked Alaska 4296220628 (612) 555-0155 first.last@gmail.com SSN: 000-00-7411</p> <p style="text-align: center;">MERGE WITH EXISTING RECORD</p> <p>Joe Alaska 5027 (651) 236-8236 ext. 123 imapdummyaccount@gmail.com SSN: 000-00-7411</p> <p style="text-align: center;">MERGE WITH EXISTING RECORD</p>

CANCEL [< PREVIOUS](#)

By selecting "Merge with Existing Record", the window will close, and you will be automatically navigated to the "Merge Employee" window.

Note The merging process can be completed by following the same instructions listed [above](#).

Related Articles