

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

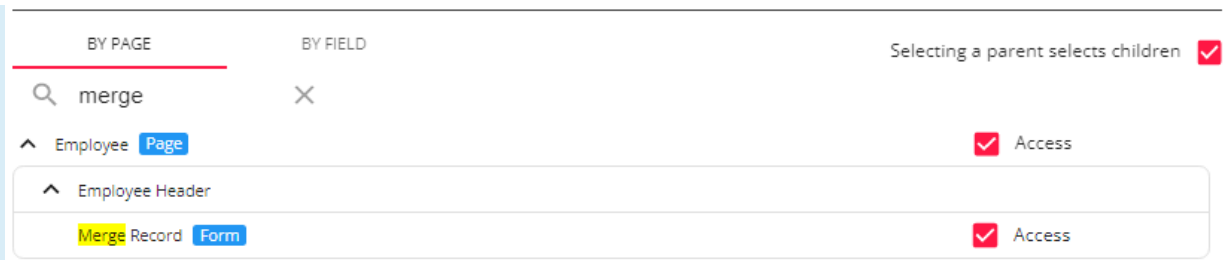
Employee records in Beyond are able to be merged via two methods:

- [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:

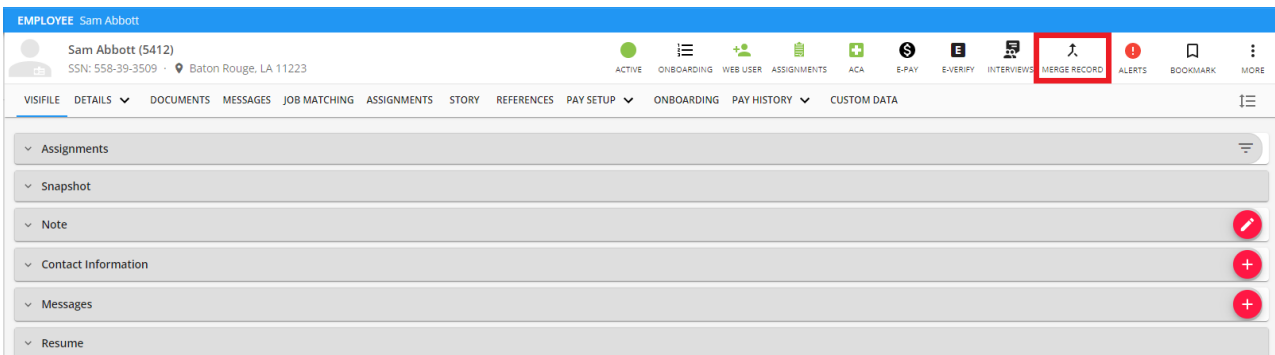


For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

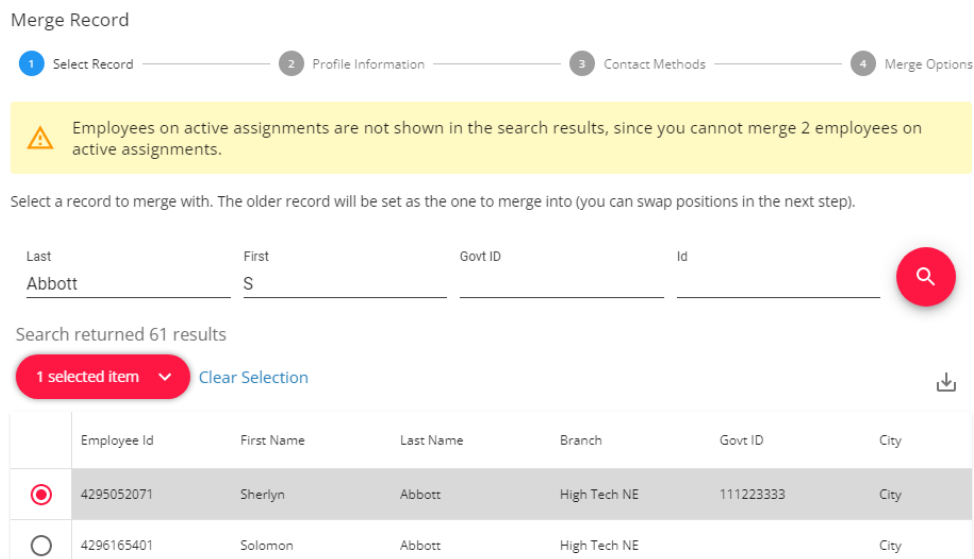
Employee Record Method

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":



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

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

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

First Name	Last Name		First Name	Last Name
Sherlyn	Abbott		Sam	Abbott
Street	101 191st Street West		Street	101 191st Street West
Street 2			Street 2	
City	City		City	Baton Rouge
State	Zip Code		State	Zip Code
Louisiana	11223		Louisiana	11223
Branch			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

First Name

zzSherlyn

Last Name

zzAbbott



First Name

Sam

Last Name

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

Swap

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 2



Street 2

City

City



City

Baton Rouge

State

Louisiana

Zip Code

11223



State

Louisiana

Zip Code

11223

Branch

High Tech NE

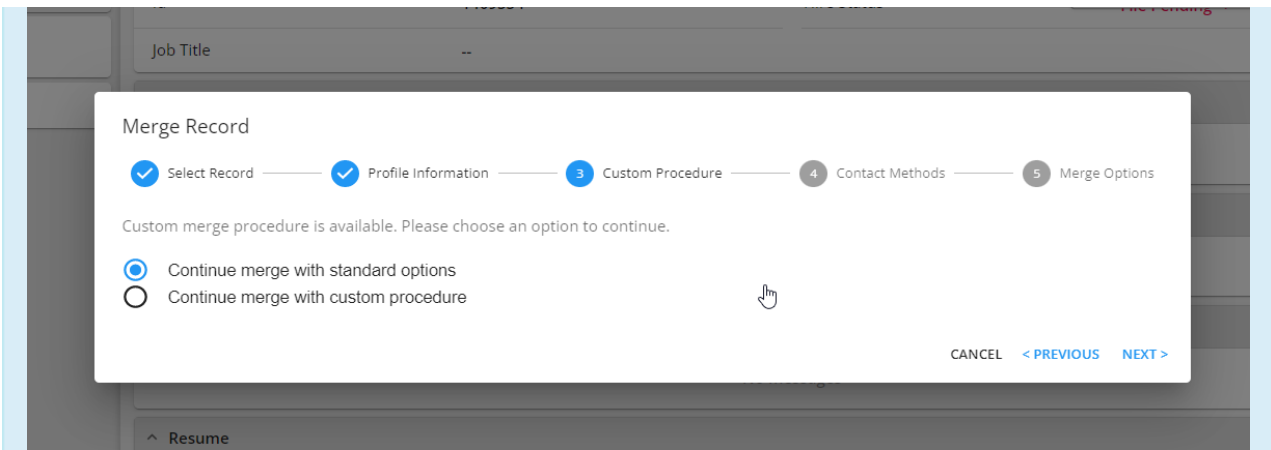
Branch

High Tech NE

CANCEL < PREVIOUS **NEXT** >

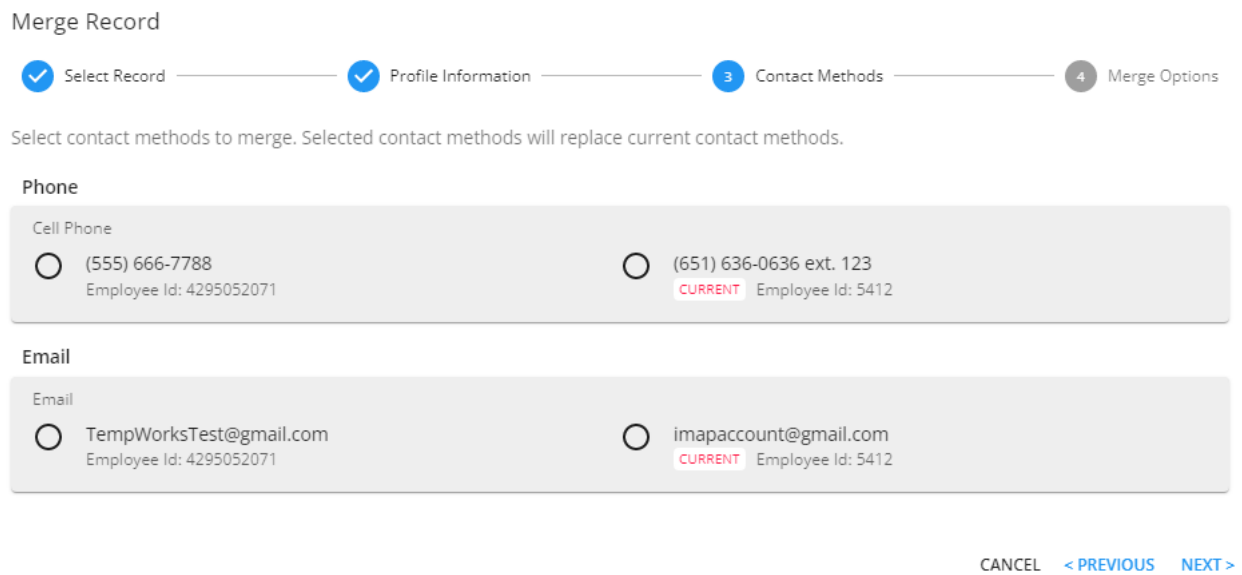
Note If you have address standardization enabled within your system, you will be presented with an additional "Address Standardization" window to select the intended address for the merge.

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:



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:



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

Merge Record

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

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

Phone

Cell Phone	
<input checked="" type="radio"/> (555) 666-7788 Employee Id: 4295052071	<input type="radio"/> (651) 636-0636 ext. 123 CURRENT Employee Id: 5412

Email

Email	
<input checked="" type="radio"/> TempWorksTest@gmail.com Employee Id: 4295052071	<input type="radio"/> 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 — **4** 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
- Assignments & Pay History
Accrual history, Check history
- Interest Codes
- Documents
Includes Required Documents
- Custom Data Fields
Only fields that do not exist in the primary record will be moved
- Messages



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:

Search / Employees												
BASIC						ADVANCED						
Last Name	First Name	Employee Id	Government Id	Assigned	Status	Branch	Service Representative	Is Assigned	Last Message	ZIP	Resume on file	
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:

Search / Employees

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

1 selected employee Clear Selection

<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

Rows per page: 100 1-2 of 2

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

Search / Employees

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

1 selected employee Clear Selection

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

Onboarding

Assign a New Workflow...
Assign a pre-configured workflow and optionally set the starting step or additional pages.

Assign Pages Ad Hoc...
Assign a manually-specified set of pages that are separate from existing workflows.

<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

Rows per page: 100 1-2 of 2

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:

Search / Employees

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

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

The screenshot shows an employee search interface. At the top, there are tabs for 'BASIC' and 'ADVANCED'. Below these are search filters for 'Last Name', 'Cagee', 'Assigned', 'Unassigned', 'First Name', 'Status', 'Branch', and 'Service Representative'. A search button is visible. Below the filters, a message states 'Search returned 2 results'. A dropdown menu is open for '2 selected employees', showing options like 'Email 2 Recipients', 'Log Message for 2 Recipients', 'Make Candidates', 'Make Job Offers', 'Assign', and 'Merge Record'. The 'Merge Record' option is highlighted with a red box. Below the dropdown, there is an 'Onboarding' section with options for 'Assign a New Workflow...' and 'Assign Pages Ad Hoc...'. A table of results is visible in the background, showing columns for 'Name', 'Branch', 'Is Active', 'Is Assigned', 'Last Message', 'ZIP', 'Resume on file', 'Phone', and 'Cell Phone'.

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:

The screenshot shows the 'Merge Record' window. It has a progress bar with four steps: 1 Profile Information, 2 Address Standardization, 3 Contact Methods, and 4 Merge Options. Below the progress bar, it says 'Verify information. Changes that you make will be applied after the merge is complete.' There are two employee records displayed. The first record has a red background and says 'This record will be updated and deactivated'. The second record has a white background and says 'This record will be updated'. The first record's details are: Employee Id: 4295105140, Employee Status: Eligible and Active. The second record's details are: Employee Id: 4295105069, Employee Status: Web Pending. A 'Swap' button is located between the two records, highlighted with a red box.

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:

Identification - Identification

1 Identification 2 Duplicate Check

SSN [Redacted] 7411 Remove SSN

Driver's License or ID Card

Number State

Expiration Date No expiration date provided Class

CANCEL NEXT >

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:

Identification - Duplicate Check

1 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: [Redacted] 7411</p> <p>SUBMIT UPDATE</p>	<p>Baked Alaska 4296220628 (612) 555-0155 first.last@gmail.com SSN: 000-00-7411</p> <p>MERGE WITH EXISTING RECORD</p>
	<p>Joe Alaska 5027 (651) 236-8236 ext. 123 imapdummyaccount@gmail.com SSN: 000-00-7411</p> <p>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