
Link Employee Records

The Link Employee Records feature allows you to view and link employee profiles that have the same Social Security number and belong to the same person.

Perform will display a list of tables that represent employees who have the same SSN in multiple profiles that exist within the individual client ID or across the Company relationship. If the employee profiles represent the same person, you can easily manage this by linking them together in Perform.

Linking records will automatically update each record with demographic information that is selected by the user to reflect the most accurate information for the employee. The updates will apply to all individual profiles, ensuring that the employee data is consistent across each profile. Additionally, any future changes to this information will automatically apply to all profiles within the relationship that are associated with that SSN.

Alternatively, profiles that have the same SSN in the Company relationship but have different demographic information setup among the profiles may not be the same person. This feature will allow you to view those employees and easily correct their SSN as needed.

Note: Linking employees does not affect pay, reporting, or W2 distribution for the individual employee.

Note: If you use workflows to manage changes to Personal and Contact information and have pending changes, Perform system hides employee tables for that SSN record until the changes are approved.

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Note: The Link Employee Records banner appear only if the user has one of these roles in all clients in the company: Full Access or Company Administrator. It is also available to Paycor Specialists.

Navigation

If your company has employees that need to be linked, a banner will be accessible from within the **Manage Employees** area of Perform. The Link Employee Records page will show a list of employee tables containing records who may be the same person. See pages 3 to 6 for list of all demographic records that may exist for each table, as well as steps you can take if these employees are not the same person.

See the grid below to get familiar with the new Link Employee Records:

Item	Description
<p>1. </p>	This link may appear within a banner on the Manage Employees page and will take you to a list of profiles and records. This banner will only display when you have employee profiles that need to be linked.
2. Employee Table	Each table in this area will represent a grouping of employee profiles with the same SSN, who have personal and contact values or records that need to be resolved and/or linked. The number of tables displayed will be indicated by the number at the top of the page.
3. Resolving values	The number of values that need to be resolved will display below the table. You may use the scroll bar to view all fields that are not linked.
4. Rows	Each row of the table will begin with the Client ID then Employee #. You may select the Employee # to navigate directly to the individual employee profile at any time. Some rows may be yellow indicating that they may or may not be the same person.
5. Columns	Each column header represents applicable personal and contact information that is currently setup on the employee profile: <ul style="list-style-type: none"> • Gray headers indicate there are no differences between the employee profiles. • Blue headers indicate there are differences between the employee profiles.
6. Radio buttons	You can reconcile the differences as needed by selecting one of the radio buttons to indicate that the field contains the most accurate record. Or if no radio buttons appear, then all employee information is consistent and the employee profiles will be ready to be linked. <i>Note: In certain instances, you may not wish to link employee profiles who have the same SSN.</i>
<p>7. </p>	You may select the Link Records button once all values are resolved. Selecting this button indicates that the employees are the same person and the demographic records in the profile should be linked. Once selected, the employee table will be removed from the list.
<p>8. </p>	This button will appear if records include profiles whose first and last names are not the same. The table will have rows in yellow, indicating that they may not be the same person. In this case, you are encouraged to access the individual employee profile first, to check the SSN and decide if the employee profile should be linked.
<p>9. </p>	If applicable, you may click the page over to navigate to additional tables.

Screenshots are available on the next page

Note: Once records are linked any future updates to personal and contact information will automatically apply to all profiles associated with that SSN within the Company Relationship.

You have 1 pending new hires. [Manage pending new hires](#)

You have 3 employees with unlinked records. [Link employee records](#) **1.**

Employee Name | Employee #

Employee Name	Employee #
Abram, Lindsay	8
Abram, Lindsay	9
Allen, Sr., Mark A.	2
Deltz, Anne	10
Doe, John	9
Doe, Jon	7
Jacobs, Laura	4

Link Employee Records

3 Employees

2.

3.

4.

Client ID	Empl #	Last Name	First Name	Status	Birth Date	Address
116676	9	Doe	<input type="radio"/> John	Active	10/10/1950	200 Longbranch Lane, Hebron, KY
116677	7	Doe	<input type="radio"/> Jon	Active	10/10/1950	200 Longbranch Lane, Hebron, KY

5.

6. 0 of 3 Values Resolved **7.** [Link Records](#)

Client ID	Empl #	First Name	Status	Birth Date	Address
116676	2	Smith	Active	05/12/2017	123 Perform
116676	3	Marc	Active	05/12/2017	123 Perform

8. [Ignore Warning and Link](#)

9. 1 2 3 4 5 6 >

List of Employee Fields

These fields are located on Personal Information or Contact Information pages of the individual profiles within Manage Employees.

- Phone Number
- About Narrative
- Skills listing
- Prefix
- Birth Date
- Marital Status
- First Name
- Status
- Age
- Address
- Ethnicity/Race
- Legal First Name
- Social Security Number
- Disability
- Middle Name
- Veteran
- Last Name
- Tobacco User
- Accredited
- Maiden Name
- Suffix
- Home Phone
- Gender
- Emergency contact information

Link Employee Records

Follow these steps to perform this task:

1. In the **Manage Employees** area of Perform, click the **employees with unlinked records** link. The **Link Employee Records** page appears.
 2. Select the most up to date value in each **blue** column of the table. Scroll to the right to see all available record information. One value in each blue column must be selected. If there are multiple pages, navigate to each page and select the most up to date values for all listed employee records.
 - If there are no differences between records, simply click **Link Records**. Perform will link the employee records or “profiles” and keep the personal and contact information in sync from this point forward.
-
- Note: If warnings are indicated for the employee, you may choose to ignore them by selecting the **Ignore Warnings and Link** button.
-
3. When you've finished selecting values, click the **Link Records** button. (This button will be disabled until all required values in the table are resolved). A confirmation message will appear on the screen informing you how many employee records have been linked. Perform will keep the personal and contact information in sync from this point forward.
 4. If you have Paycor's Benefit Advisor application, a **Select Position for Benefits** option will appear for each employee you just linked. Select the employee position that should be linked to their benefits from the drop-down list and click **OK**. Perform will keep the personal benefit information in sync from this point forward.
 - In Perform, each employee in a company has a “profile” where you can view a summary of all their information. If an employee has multiple positions in a company that have been linked, each position becomes a separate profile that you can easily navigate between in Perform. **You are deciding here which employee profile will display the benefits information on the employee's Position page in Perform. You can edit which position is linked to benefits at any time on this page.**

1.

A few items need your attention: [Show Less](#)

- 17 pending new hires.
- 2 employees with unlinked records.

Count: 66

<input type="checkbox"/>	Employee Name ▲	Employee # ▲	Job Title ▼	Status (8) ▼
<input type="checkbox"/>	Allen, Connie	193	Sales Executives	● Active
<input type="checkbox"/>	Alsh, Morgan G	284	Customer Service Represent...	● Active
<input type="checkbox"/>	Anderson, Brian M	282	Operations Director	● Active
<input type="checkbox"/>	Arker, Ron	9	HR Administrator	● Active

< Employee List

Link Employee Records

2 Employees

2.

Nasert, Christy

Some of these may not be the same people. [Tell me how to fix this](#)

Client ID	Empl #	Last Name	First Name	Status	Job Title	Birth Date	Address	County	Gender	Is Tobacco
159628	117	● Nasert	● Christy	Active	Branch Manager	12/05/1982	● 8184 Anchor Point Drive, Plano, TX 75023	● Collin	● Female	● No
159858	1	○ Patterson	○ Michele	Active	Sales Executive	12/05/1982	● 2527 Ridgeland Place, Cincinnati, OH 45212	● Hamilton	○ No Value	○ No Value

10 of 10 Values Resolved

Silva-Cole, Simon

Client ID	Empl #	Last Name	First Name	Status	Job Title	Birth Date	Address	County	Prefix	Is Tobacco User
159628	71	● Silva-Cole	Simon	Active	Operations Specialist	06/28/1974	● 14805 Dade Street, Chicago, IL 60613	● Cook	○ No Value	● No
159858	3	○ Silva	Simon	Active	Operations Manager	06/28/1974	● 2280 Reading Road, Cincinnati, OH 45215	● Hamilton	● Mr.	○ No Value

10 of 10 Values Resolved


3.

Select Position for Benefits

Which position do you want to link to employee benefits?

Operations Specialist (159628 - Perform Design LTD) ▼

4.



Simon Silva-Cole
Operations Manager
[Profile Activity Log](#)

EMPLOYMENT DETAILS

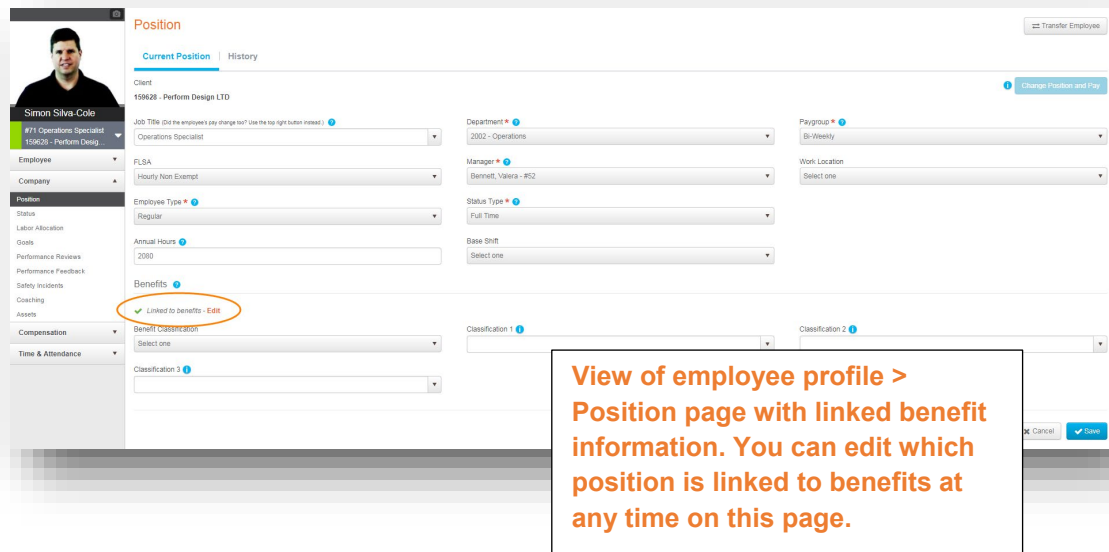
- Manager: Pam Myers
- Work Location: Boston
- Client: 159858 - Perform Services

Simon Silva-Cole

- #3 Operations Manager 159858 - Perform Services
- #3 Operations Manager 159858 - Perform Services
- #71 Operations Specialist 159628 - Perform Design LTD

I-9 Verification
Certifications
Courses
Education
Documents

View of employee with linked employee profiles. The selected position for benefits will be the one that displays the benefit information.



View of employee profile > Position page with linked benefit information. You can edit which position is linked to benefits at any time on this page.

Note: You may also access the profiles from this area to correct duplicate Social Security Numbers. (Employee tables that exceed 99 profiles with the same SSN will not display in this area).

Note: In the rare case that an employee table contains data for more than 99 profiles with the same SSN, this banner will display:



You must access the employee profiles individually to correct the SSN as needed. If you need assistance, please contact your Specialist for a listing of all employees that are affected.

If an Employee Might not Be the Same Person

Perform will indicate that records in the tables may not be the same person with yellow rows. If you wish to check the individual profiles before making changes, you can quickly navigate to and from any individual profiles from within this area.

Follow the steps below to do this task:

1. If the profiles are **not** the same person, click **Tell me how to fix this**: you may need to edit the SSN on the individual profile.
Note: You may edit SSN if you have been previously configured with the appropriate access in Perform.
2. For any tables displayed in this area, you may click on the **Empl #** link to be navigated directly to the employee's **Personal Information** page to view or edit the SSN.
3. Click **Link Employee Records** at the top of the page to go back to the list of tables.
4. If the profiles **are** the same person, correct the values in the table. Follow the steps on page 4 and select the **Ignore Warning and Link** or (Link Records button) once all values are resolved. (These buttons will be disabled until all required values in the table are resolved).

PERFORM

Welcome, Lauren My Settings Sign Out

Get Help Give Feedback

< Link Employee Records Search for an Employee Search Using Filters

Personal Information

Prefix
Fr.

First Name *
Mark

Legal First Name ⓘ
If different than First Name

Middle Name
A

Last Name *
Tobias Ulear

Discharge Date

Different Employees

These employee records have the same social security number. If they do not represent the same person, update the social security numbers on the individual records.

OK

Allen, Mark Some of these may not be the same people. Tell me how to fix this

Client ID	Empl #	Last Name	First Name	Status	Birth Date	Address
116676	2	Allen	Mark	Active	07/08/1974	555 Circle D
116676	3	Smith	Marc	Active	05/12/2017	123 Perform

0 of 8 Values Resolved

Ignore Warning and Link

Cancel Save