

MANAGING EMPLOYER RECORDS

TDM System Guidance for Local Coordinators

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Tuesday, April 15, 2025

Overview of Employer Record Challenges

- The TDM System currently has many (many!) duplicate employer records.
- How might this happen? Possible reasons:
 - A participant may not notice their employer already in the system when creating their account.
 - An employer may be known by many different names.
- This challenge is not unique to the Commuter Connections TDM System, and “de-duplicating” can be a time-intensive task.

Example of 1 employer with many duplicates

| SELECT EMPLOYER | | | | |
|-----------------------|---------|--|-----------|--|
| Select | Emp Id | Employer Name | Employees | Employer Locations |
| <input type="radio"/> | 1567022 | HOUSING AND COMMUNITY DEVELOPMENT | 5 | • 7800 HARKINS ROAD, LANHAM MD 20706 |
| <input type="radio"/> | 1568505 | DHCD | 2 | • 7800 HARKINS ROAD, LANHAM MD 20706 |
| <input type="radio"/> | 1583102 | MARYLAND DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT | 4 | • 7800 HARKINS ROAD, LANHAM MD 20706 |
| <input type="radio"/> | 1583905 | MARYLAND DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT | 1 | • 7800 HARKINS ROAD, LANHAM MD 20706 |
| <input type="radio"/> | 1584206 | STATE OF MD DEPT OF HOUSING | 3 | • 7800 HARKINS ROAD, LANHAM MD 20706 |
| <input type="radio"/> | 1587853 | MARYLAND DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT | 1 | • 7800 HARKINS ROAD, LANHAM MD 20706 |
| <input type="radio"/> | 1588625 | MARYLAND HCDC | 1 | • 7800 HARKINS ROAD, LANHAM MD 20706 |
| <input type="radio"/> | 1603393 | MARYLAND DEPARTMENT OF HOUSING & COMMUNITY DEV. | 1 | • DHCD 7800 HARKINS ROAD, LANHAM MD 20706 |
| <input type="radio"/> | 1603414 | MARYLAND DEPARTMENT OF HOUSING | 1 | • MARYLAND DEPARTMENT OF HOUSING 7800 HARKINS ROAD, LANHAM MD 20706 |

Overview of Employer Record Challenges

- As we implement a new internal process to reduce duplicate records, the following scenario could be experienced by a new Commuter Connections registrant:
 - **Commuter A** creates an account and adds their employer (not previously in the system).
 - The new employer record is not “Active” until it is reviewed internally by COG.
 - **Commuter B** from the same employer tries to create an account. They will not be able to see the existing employer record (because it is under review) AND they will not be able to add it as a new employer (because there is already a record in the system).
 - Result: **Commuter B** is unable to create their new account.
 - *(Note: Commuters with existing Commuter Connections accounts could add this new employer by selecting the “Update Employer” button on their account, even if the record is not yet reviewed)*

Example of potential new registrant experience

The screenshot displays the 'CREATE ACCOUNT - NEW ACCOUNT FORM' interface. On the left, the 'Employer Administration - Manage Duplicate' section shows an existing employer record for 'DCR COMPANIES LLP' with ID 1606521. Below this, the 'Employer Location' section shows details for a location in Washington DC, with the 'Location Status' dropdown menu set to 'NEW'. On the right, the 'CREATE ACCOUNT - NEW ACCOUNT FORM' is shown with a search for 'EMPLOYER STREET ADDRESS' highlighted in yellow. The search results show '3040 IDAHO AVE NW, WASHINGTON, DC, 20016'. A disclaimer and 'Back'/'Next' buttons are also visible.

Addressing This Challenge

- **Short-term:**
 - **Employer Outreach Managers and ETCs:** please let us know in advance of any major employer outreach efforts with new employers so we can ensure there is a current, active employer record available to registrants.
 - If the employer has a multi-building/campus setting, let us know as many of the locations as possible so we can add them to the employer record appropriately.
 - The Commuter Connections team is addressing the backlog of new employer records as quickly as possible.
- **Longer-term:**
 - The internal workflow we are implementing should keep new employer record review time to a minimum.
 - However, we will still benefit from advanced notification of any new employer outreach efforts so we can ensure the employer record is visible to new commuter registrants.

Example of multi-location employer

EMPLOYER ADMINISTRATION - SEARCH EMPLOYER

- To **manage** the employer information and locations, select the employer and click on the 'Review Employer' button.
- To **clean up** the employer, select the duplicate or incorrect employer and click on the 'Merge Employer' button.
- To **delete** any obsolete employers (with no employees associated), click on the 'x' button next to the employer.

| SELECT EMPLOYER | | | | | |
|-----------------------|---------|---------------------------|-----------|---|--------|
| Select | Emp Id | Employer Name | Employees | Employer Locations | Delete |
| <input type="radio"/> | 1567458 | LOUDOUN COUNTY GOVERNMENT | 152 | <ul style="list-style-type: none"> • MHSADS-POTOMAC TER GRP HOME 46486 PRIMULA CT, STERLING VA 20165 • ELECTIONS - EXTENSION SERVICES 750 MILLER DR, LEESBURG VA 20175 • TREASURER-COMMISSIONER OF REV 46000 CENTER OAK PLAZA, STERLING VA 20166 • MHSADS - PURCELLVILLE GRP HOME 161 W MAIN ST, PURCELLVILLE VA 20132 • LOUDOUN COUNTY GOVT CENTER 1 HARRISON ST SE, LEESBURG VA 20175 • FIRE & RESCUE - TRAINING 16600 COURAGE CT, LEESBURG VA 20175 • PRCS - CASCADES SENIOR CENTER 21060 WHITFIELD PL, STERLING VA 20165 • 215 DEPOT CT SE, LEESBURG VA 20175 • PRCS - PHIL BOLEN PARK | X |

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