

### Data Cleansing steps

#### Data cleansing steps branch and region can take all year round.

The law requires our membership data to be "as accurate as reasonably practicable" before we can ballot or take action. The majority of legal challenges to ballots occur when our data doesn't match the employers' own records.

Data cleansing is the process of ensuring that our records are up to date and accurate, so we are ready to ballot.

You don't need to wait for a ballot before you begin data cleansing – below are some steps you can take all year round to ensure your data is kept as accurate as possible. When a ballot is called there will be additional steps but if you keep up to date on the steps below it will help you get ballot ready much more quickly.

<u>Task</u>	<u>Notes</u>	<u>Complete</u>
<b>Has DOCAS cleanse been completed?</b>	How recently has the DOCAS list been checked?	
<b>Have the workplace details been checked?</b>	Are members still working at the workplace/have they moved.	
<b>Are the workplace titles correct?</b>	Does the workplace match the employers' records – have workplaces closed or renamed but not been updated etc.	
<b>Are there members who 'work from home'?</b>	Work from home should only be used for members who contractually do not have a workplace e.g. some peripatetic or domestic care staff. Not to be used for those who have a workplace but generally work from home for convenience.	
<b>Are the job titles correct?</b>	Has the member changed job roles or has the job been regraded or title changed? The job title should match what's on the members' payslip or contract.	
<b>Is the members' home address correct?</b>	Including postcode in the right format	
<b>Is the member's preferred email address and telephone number correct?</b>	Contact details should be updated with members preferences.	
<b>Are there any members that need to be lapsed?</b>	Various issues – such as members no longer in a role recruited by UNISON, payment issues etc.	
<b>Have any members that are paying by cash, cheque or standing order been checked?</b>	Are payments up to date? If not, you should seek to get them up to date and on the correct subscription level.	
<b>Is the employer contact details correct?</b>	Employer details on RMS should be kept up to date regularly.	
<b>Have all attempts to update member's records been exhausted?</b>		

**Data cleansing steps branch and region will need to take once a dispute is lodged.**

The following tasks should be completed (**in addition to the regular data cleansing steps above**) when you lodge a dispute to make data cleansing for the ballot easier.

The region and branch should focus on the data cleansing as soon as they are aware that a ballot might be taking place.

<b><u>Task</u></b>	<b><u>Notes</u></b>	<b><u>Complete</u></b>
<b>Are the job titles correct?</b>	Does the employer recognise this job title?	
<b>Are the workplace titles correct?</b>	Does the workplace match the employers' records – have workplaces closed or renamed but not been updated etc.	
<b>Are we balloting a specific group of members that are not easily identified by workplace or job title?</b>	If not, then all these members need to be identified individually – this may require the regional RMS team adding an identifier code to the members records/branch fields.	
<b>Do any members need excluding from the ballot?</b>	Are their members leaving employer, being made redundant or on maternity leave?	
<b>Are there any members with returned mail?</b>	Members should be contacted to update their address – if unable to contact they will be removed by RMS when the final extract is run.	
<b>Are there any members with invalid postcodes?</b>	Issues with postcodes will cause RMS to remove members from the final extract – most commonly issues are with the formatting of the postcode when it was entered.	
<b>Are there any members with unknown workplace titles or codes?</b>	Members should be contacted to update - RMS will remove members with unknown workplace titles or codes from the final extract.	
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<b>Are any members due to retire?</b>	If members are due to retire before the close of the ballot they should be removed from the ballot.	
<b>Are all the members that have been selected for this ballot eligible to be balloted?</b>	Are they covered by the trade dispute?	
<b>Is the ballot contact details correct on RMS?</b>	Do we hold the correct contact for the employer on RMS – such as the CEO.	
<b>Have all attempts to update member's records been exhausted?</b>		