

Duplicate Participant Across the Enterprise

We Will Begin Shortly

Meet Your Trainer

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Learning Objective

This session will support users in understanding how prevent and clean up duplicate participants across the Enterprise.

Agenda

Preventing Duplicates

Check For Duplicates

Merge Duplicates

Preventing Duplicates

Preventing Duplicates

2 Settings

- Listen for Enterprise Duplicates
- Advertise Enterprise Duplicates

Create a Duplicate Warning

Duplicate Information

You are attempting to add a new participant with potential matches in the system. Duplicate Check data points are selected on the 'Manage Demographics' page.

First Name: John
Last Name: Jones
DOB:

There are potential matches for this new participant.

[Add as New](#)

NAME	SITE	SSN	DOB
<input type="radio"/> John Jones	SLL VNAO Aug 8-11		
<input type="radio"/> John Jones	XYZ Services		07/13/1970

[Cancel](#) [Merge Participants](#)

Preventing Duplicates

Steps

1. Enterprise
2. Manage Sites
3. Click the Word “No” in the Listen for Enterprise Duplicates Column to change it to “yes”
4. Click the Word “No” in the Advertise Enterprise Duplicates Column to change it to “yes”
5. Repeat these steps for each site in the list

The screenshot shows the Enterprise Manager interface. At the top right, there is a 'MESSAGES' icon with a notification badge, a user profile icon, and the text 'Enterprise Manager'. Below this is a search bar with the placeholder 'Search Term(s)...' and a 'SEARCH' button. The main content area is a table with the following columns: 'Site Name', 'Site Navigation Type', 'Status', 'Listen for Enterprise Duplicates', and 'Advertise Enterprise Duplicates'. A red box highlights the 'Listen for Enterprise Duplicates' and 'Advertise Enterprise Duplicates' columns for several rows. The table data is as follows:

Site Name	Site Navigation Type	Status	Listen for Enterprise Duplicates	Advertise Enterprise Duplicates
All Children First Eaton NJ	Level5	Enabled	yes	yes
All Children First Westchester...	Level5	Enabled	yes	yes
Andrew's Aid Services East	Administrative	Enabled	no	no
CH Baltimore EAB 11/15/16	Administrative	Disabled	no	no
Chad's Collaboration Council E...	Administrative	Enabled	yes	yes
Chad's Collaboration Council W...	Administrative	Enabled	yes	yes
Gabriela's Ministries East	Administrative	Enabled	no	no
Gabriela's Ministries West	Administrative	Enabled	no	no
Liang's Aid Society East	Administrative	Enabled	yes	yes
Liang's Aid Society West	Administrative	Enabled	yes	yes
Maggie's Shelter East	Level4	Enabled	no	no
Maggie's Shelter West	Level4	Enabled	no	no
Oct 17 Bootcamp	Administrative	Disabled	no	no
Program 2	Level4	Enabled	yes	yes

At the bottom of the page, there is a footer with the text 'ETO ver. 2023.0.4014 © 2001-2024 Developed by Social Solutions' and several social media icons (Twitter, Facebook, Instagram, YouTube, LinkedIn).

Checking for Duplicates

Checking for Duplicates

- Select Demographic fields to be used when searching for possible duplicates
- Have up to 5 different criteria sets
- Run over night

Enterprise Participants - Manage Criteria Sets

Match
Criteria: -- Add a New Matching Criteria --

Name:

Type: -- Select One --

	Demographic	Type	Set for Duplicate Check
1.	FirstName	Arbitrary Text	<input checked="" type="checkbox"/> Exact Match <input type="button" value="v"/>
2.	MiddleInitial	Arbitrary Text	<input type="checkbox"/>
3.	LastName	Arbitrary Text	<input type="checkbox"/>
4.	Address1	Arbitrary Text	<input checked="" type="checkbox"/> Exact Match <input type="button" value="v"/>
5.	Address2	Arbitrary Text	<input type="checkbox"/>
6.	ZipCode	Zip Code	<input type="checkbox"/>
7.	EEmail	Arbitrary Text	<input type="checkbox"/>
8.	SSN	Arbitrary Text	<input type="checkbox"/>
9.	CaseNumber	Arbitrary Text	<input type="checkbox"/>
10.	DOB	Date	<input checked="" type="checkbox"/> Exact Match <input type="button" value="v"/>
11.	Gender	Boolean	<input type="checkbox"/>

Checking for Duplicates

Steps

1. Enterprise
2. Enterprise Participants
3. Add New Criteria
4. Name the Criteria
5. Check the boxes next to desired demographics
6. Select desired exact or like match
7. Click Create New Criteria to Save

Enterprise Participants - Manage Criteria Sets

Match:

Criteria:

Name:

Type:

	Demographic	Type	Set for Duplicate Check
1.	FirstName	Arbitrary Text	<input checked="" type="checkbox"/> Exact Match <input type="text"/>
2.	MiddleInitial	Arbitrary Text	<input type="checkbox"/>
3.	LastName	Arbitrary Text	<input type="checkbox"/>
4.	Address1	Arbitrary Text	<input checked="" type="checkbox"/> Exact Match <input type="text"/>
5.	Address2	Arbitrary Text	<input type="checkbox"/>
6.	ZipCode	Zip Code	<input type="checkbox"/>
7.	EMail	Arbitrary Text	<input type="checkbox"/>
8.	SSN	Arbitrary Text	<input type="checkbox"/>
9.	CaseNumber	Arbitrary Text	<input type="checkbox"/>
10.	DOB	Date	<input checked="" type="checkbox"/> Exact Match <input type="text"/>
11.	Gender	Boolean	<input type="checkbox"/>

Merging Duplicates

Merging Duplicates

Enterprise Participants

Click View Results

Need at least 1 Match Criteria to get results

View Enterprise Participants by Criteria Set

Create / Manage Criteria Sets View Results

Match Criteria : Duplicates 12/21/2023 8:30:00 PM

Unique Participants using the Selected Criteria: 810

Result Details

Total Records : 810 Export To : Csv This will only export the currently visible rows.

	client GUID	CLID	Case Number	First Name	Middle Initial	Last Name
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="a"/>
+	e9740bbd-c86f-4d2e-afbd-a37be2e3b679	11410	11410	Joe		Able
+	9b786fa7-6c4e-479a-9523-13620ea815a7	10918	10918	Samual		Abate
+	9017540a-fb8c-444e-aeeb-0136577fd0be	10987	10987	Gomez		Adams
+	9b2ff29e-b595-4aa5-8de4-e60cf4c7370b	11414	11414	Alexander		Adams
+	7ab7da0f-9912-46e6-9ed6-9c18a2545215	11412	11412	Joe		Able
+	c52e03c8-bc0c-4d57-918b-f4bc400f80de	10988	10988	Wednesday		Adams
+	90ef3032-15eb-454d-91cc-07831ab2d08a	10989	10989	Pugsly		Adams
+	c402a4b4-c389-4f33-be35-f7745105cae3	10917	10917	Hank		Aaron

Additional Resources

Additional Training Opportunities

- [Knowledge Base](#) – How-To Articles (Search Chat or Visit Online)
- [Bonterra Academy](#) – Free Webinars & Recordings
- [Foundations](#) – Intensive, Multiday Courses to Cover Admin Basics
- [Admin Labs](#) – 2 Hour Live Trainings on Specific Capabilities



Build confidence & knowledge in
our software!

Customer Support

Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email: eto@bonterratech.com

Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you
in future trainings.