

ETO TARGETED WEBINAR

# Demographic Visibility Webinar



# Meet Your Trainer

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# Learning Objective

This session will provide users understand the tools that govern Demographic visibility within ETO.

# Agenda

Scope

Program Groups

Family Demographic  
Relationships

# Scope

# Scope

- Impacts visibility for data entry & managing
- Standard Demographics Site Scope
- Custom Demographic scope varies

Standard Participant Demographics								
Standard Demographic Name	Type	Description	Access Level	Required	Disabled	View Only	View Only After Initial Save	Set for Duplicate Check
Ext		Edit	N/A	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A
First Name	Text	Edit	N/A	N/A	N/A	N/A	<input type="checkbox"/>	True
Middle Initial	Text	Edit	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	False
Last Name	Text	Edit	N/A	N/A	N/A	N/A	<input type="checkbox"/>	True
Suffix	Exclusive Choice	Edit	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	False
Address 1	Text	Edit	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	False
Address 2	Text	Edit	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	False
Zip Code	Numeric	Edit	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	False
E-Mail	Text	Edit	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	False
Referral Source	Exclusive Choice	Edit	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	False
Funding Source	Exclusive Choice	Edit	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	False
SSN	Text	Edit	N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	False

# Scope

## 3 Scope Options

- Enterprise
- Site
- Program

Custom Participant Demographics								
Custom Demographic Name	Type	Description	Access Level	Required	Disabled	View Only	View Only After Initial Save	Set for Duplicate Check
Are you a Veteran?	Defined Text Values	Edit	Enterprise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
Currently Employed	Boolean	Edit	Program (Edit)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A
Emergency Contact Phone number and Type	Arbitrary Text	Edit	Site (Edit)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A



# Scope

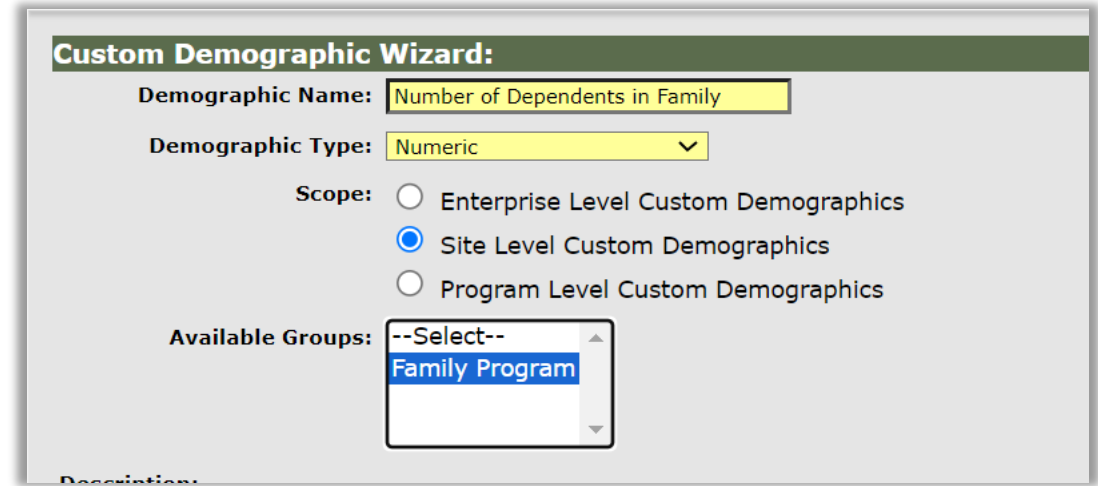
May 2024 Admin Foundations Strong Families						
Search Term(s)...						
Custom Participant Demographics						
Custom Demographic Name	Type	Description	Access Level	Required	Disabled	View Only
Are you a Veteran?	Defined Text Values	Edit	Enterprise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency Contact Phone number and Type	Arbitrary Text	Edit	Site (Edit)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
English Proficiency	Defined Text Values	Edit	Program (Edit)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gender Identity	Defined Text Values	Edit	Program (Edit)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
What is your primary language	Defined Text Values	Edit	Program (Edit)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

May 2024 Admin Foundations Strong Families	
Search Term(s)...	Within
Add New Participant	
First Name ? *	<input type="text"/>
Middle Name ?	<input type="text"/>
Last Name *	<input type="text"/>
Address 1	<input type="text"/>
Address 2	<input type="text"/>
Zip Code	<input type="text"/> - <input type="text"/>
Email	<input type="text"/>
Referral Entity	

# Program Groups

# Program Groups

- Used with Enterprise & Site Level Demographics
- Narrows the scope of field
- Provides flexibility



The screenshot shows a 'Custom Demographic Wizard' window. It contains the following fields and options:

- Demographic Name:** A text box containing 'Number of Dependents in Family'.
- Demographic Type:** A dropdown menu set to 'Numeric'.
- Scope:** Three radio button options: 'Enterprise Level Custom Demographics', 'Site Level Custom Demographics' (which is selected), and 'Program Level Custom Demographics'.
- Available Groups:** A dropdown menu showing '--Select--' and 'Family Program'.
- Description:** A partially visible text box at the bottom.

# Program Groups

## 2 Steps

1. Create Program Group
2. Apply Program Group

Program Group Name	Level	Type	Status	Last Updated
3. Family Program	Site		Enabled	5/30/2024

Demographic Name: Number of Dependents in Family

Demographic Type: Numeric

Scope: ☐ Enterprise Level Custom Demographics  
☒ Site Level Custom Demographics  
☐ Program Level Custom Demographics

Available Groups: --Select--  
Family Program

# Program Groups

- Manage Program Groups
  - Demographics shows assigned demographics
  - Programs shows assigned sites and or programs.

Manage Program Groups								
<a href="#">➔ ADD NEW PROGRAM GROUP</a>								
Program Group Name		Level		Type	Status	Last Updated		
DISABLED								
3.	Family Program	Site			Enabled	5/30/2024	Edit	<a href="#">Programs</a> <a href="#">Demographics</a>

# Family Demographic Relationships

# Family Demographic Relationships

- Display fields based on relevance
- Managed by Administrator
- Impacts Add New Family and View/Edit Participant screen

The screenshot displays a web interface for the 'Alan Greene Family Family Dashboard'. The dashboard is divided into two main sections: 'Family Information' and 'Recent TouchPoints'.

**Family Information:** This section features a header with a family icon and the title 'Alan Greene Family Family'. Below the header, there are links for 'Alan Greene Family', 'Alan Greene' (Parent Head of Household), and 'Anastasia Greene' (Child). There are also links for 'Family Program History' and 'Family Composition History'. At the bottom of this section, there are icons for editing, deleting, and a trash can.

**Recent TouchPoints:** This section has a header with a clipboard icon and the title 'Recent TouchPoints'. The main content area states 'You have no recent TouchPoints.' and includes a '+ New' button.

# Family Demographic Relationships

## Steps

1. Select Manage Demographics.
2. Select Manage Family Demographics.
3. Go to the Demographics Relationship tab.
4. Locate the demographic you would like to modify.
5. Check off all relationship types that should see that demographic.
6. Repeat for additional demographics.
7. Click Save.

**Manage Family Demographics**

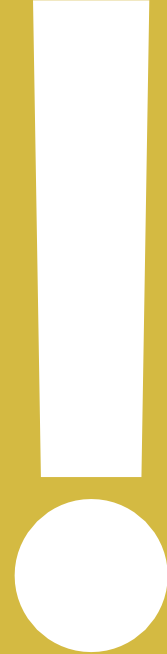
Use the tabs below to manage which Demographics will autopopulate on the Add Family Screen and define which

General Settings Autopopulate Demographics **Demographics|Relationship**

Demographic	Relationship
1. Prefix	<div><div><input checked="" type="checkbox"/> Parent</div><div><input type="checkbox"/> Child</div><div><input checked="" type="checkbox"/> Aunt</div><div><input checked="" type="checkbox"/> Uncle</div><div><input checked="" type="checkbox"/> Grandmother</div></div> <div><div><input checked="" type="checkbox"/> Grandfather</div><div><input checked="" type="checkbox"/> Step Parent</div><div><input checked="" type="checkbox"/> Other</div><div><input checked="" type="checkbox"/> Spouse</div><div><input checked="" type="checkbox"/> Domestic Partner</div></div> <div><div><input checked="" type="checkbox"/> Other adult</div><div><input checked="" type="checkbox"/> Step Parent</div><div><input type="checkbox"/> Foster Child</div><div><input checked="" type="checkbox"/> Foster Parent</div></div>

# Keep In Mind

These settings impact **BOTH** the Add New Family data entry screen **AND** the View/Edit Participant screen for each family member.



# 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](mailto: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.