ETO TARGETED WEBINAR

Demographic Visibility Webinar

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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	Desc-rip-tion	Access Level	Required	Disabled	View Only	View Only After Initial Save	Set for Duplicate Check
Ext		Edit	N/A	☐	☐	N/A	N/A	N/A
First Name	Text	Edit	N/A	N/A	N/A	N/A	☐	True
Middle Initial	Text	Edit	N/A	☐	☐	☐	☐	False
Last Name	Text	Edit	N/A	N/A	N/A	N/A	☐	True
Suffix	Exclusive Choice	Edit	N/A	☐	☐	☐	☐	False
Address 1	Text	Edit	N/A	☐	☐	☐	☐	False
Address 2	Text	Edit	N/A	☐	☐	☐	☐	False
Zip Code	Numeric	Edit	N/A	☐	☐	☐	☐	False
E-Mail	Text	Edit	N/A	☐	☐	☐	☐	False
Referral Source	Exclusive Choice	Edit	N/A	☐	☐	☐	☐	False
Funding Source	Exclusive Choice	Edit	N/A	☐	☐	☐	☐	False
SSN	Text	Edit	N/A	☐	☐	☐	☐	False

Scope

3 Scope Options

- Enterprise
- Site
- Program

Custom Participant Demographics

Custom Demographic Name	Type	Desc-rip-tion	Access Level	Required	Disabled	View Only	View Only After Initial Save	Set for Duplicate Check
Are you a Veteran?	Defined Text Values	Edit	Enterprise	☐	☐	☐	☐	N/A
Currently Employed	Boolean	Edit	Program (Edit)	☐	☐	☐	☐	N/A
Emergency Contact Phone number and Type	Arbitrary Text	Edit	Site (Edit)	☐	☐	☐	☐	N/A

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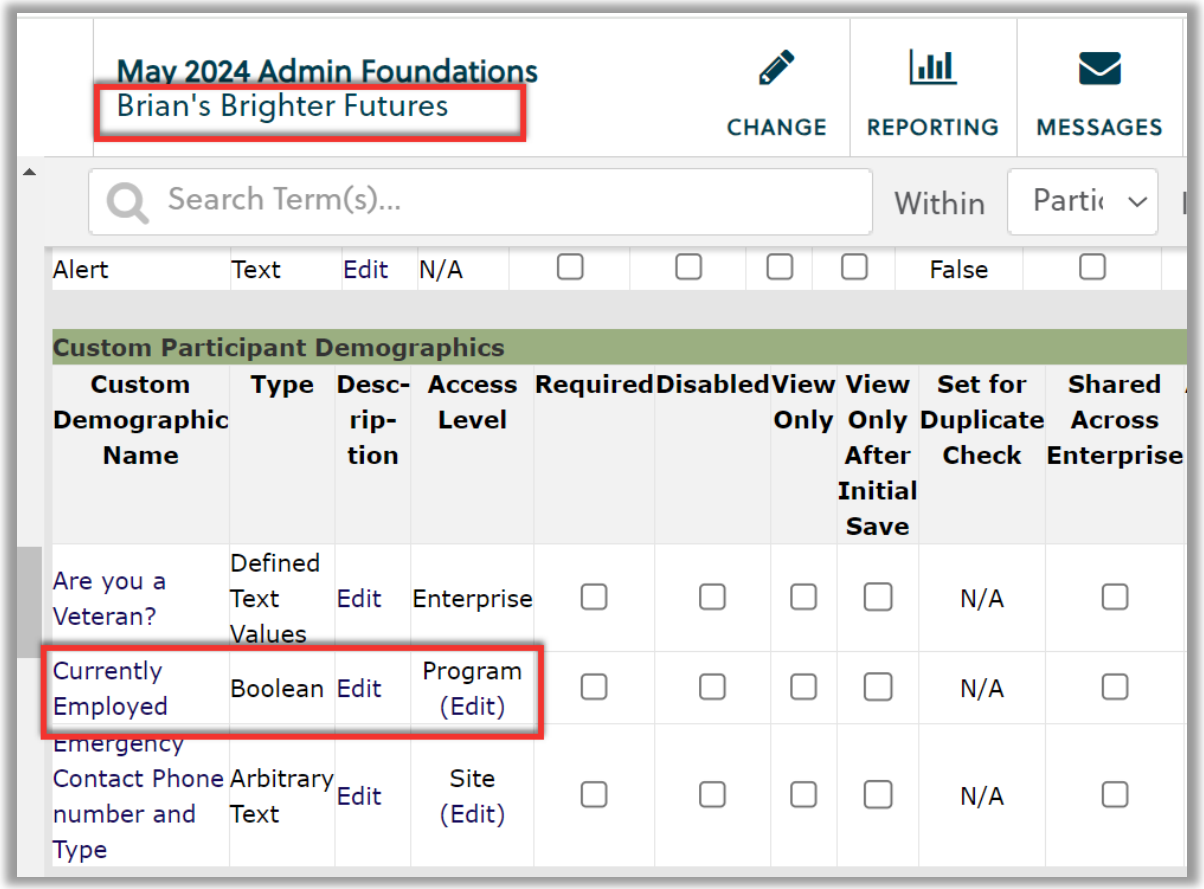
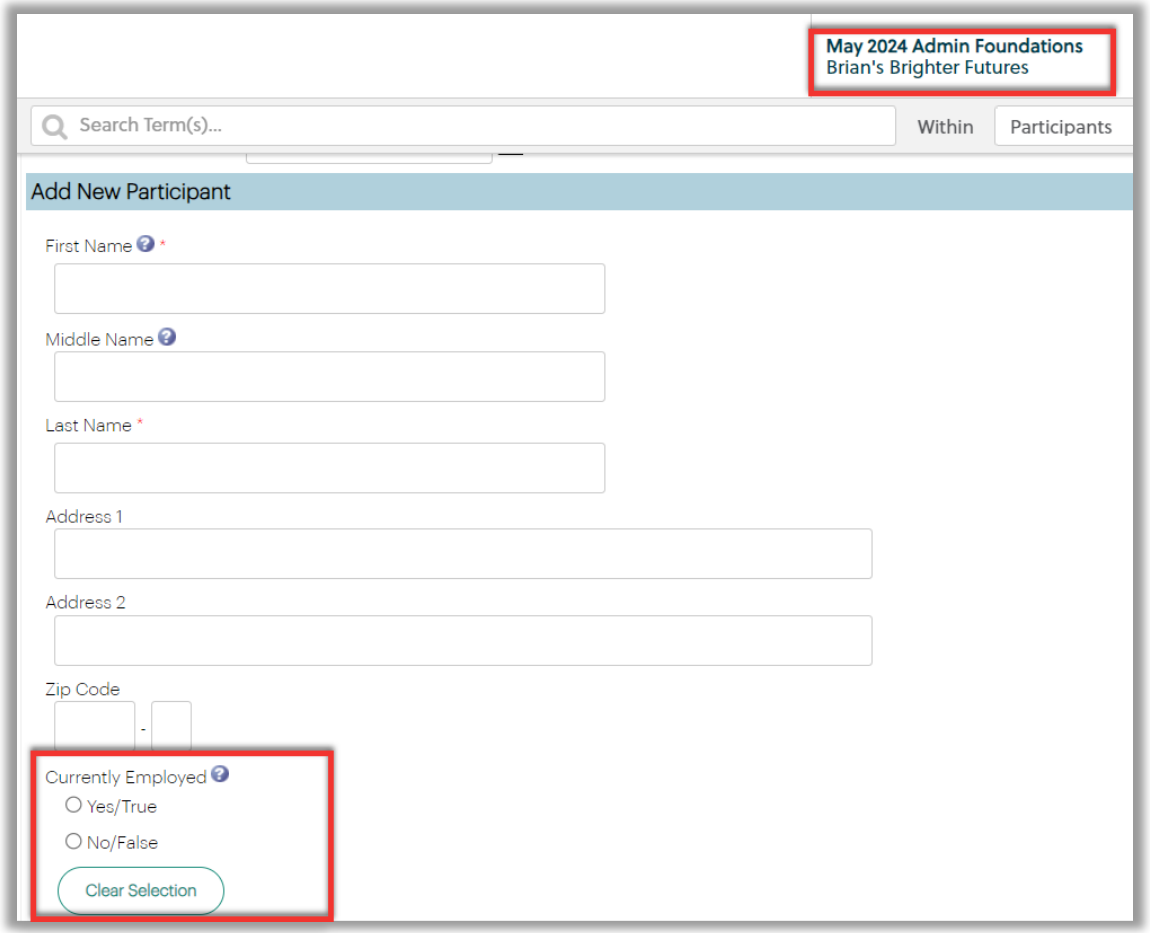
Scope



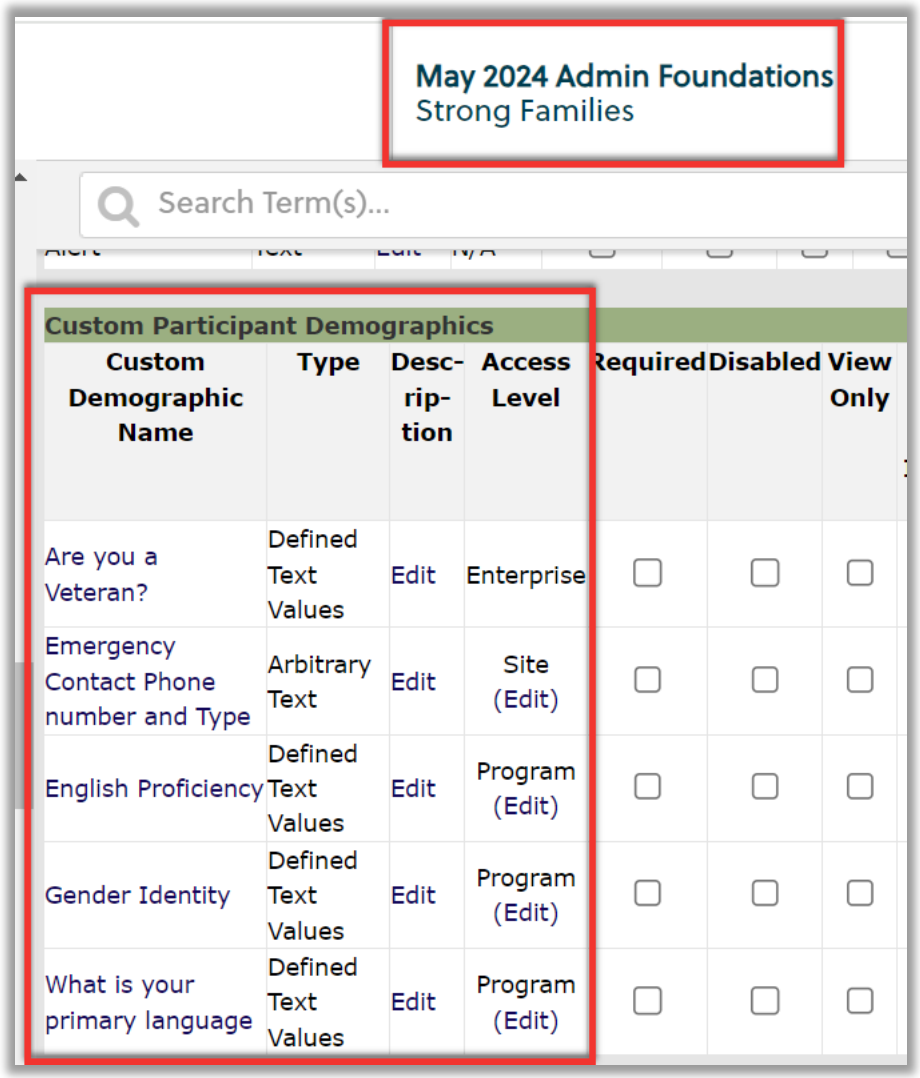
Alert	Text	Edit	N/A	☐	☐	☐	☐	False	☐

Custom Participant Demographics

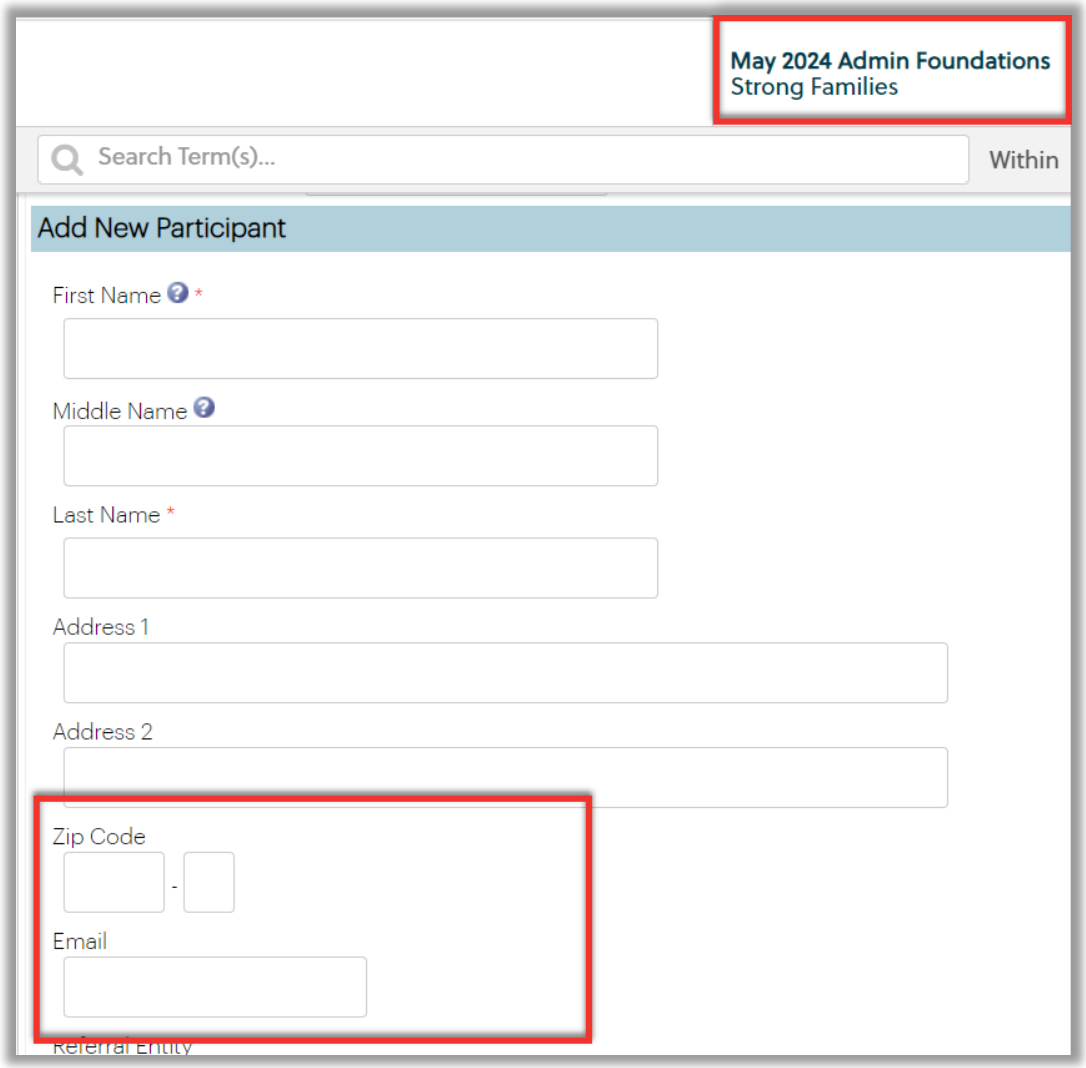
Custom Demographic Name	Type	Desc-rip-tion	Access Level	Required	Disabled	View Only	View Only After Initial Save	Set for Duplicate Check	Shared Across Enterprise
Are you a Veteran?	Defined Text Values	Edit	Enterprise	☐	☐	☐	☐	N/A	☐
Currently Employed	Boolean	Edit	Program (Edit)	☐	☐	☐	☐	N/A	☐
Emergency Contact Phone number and Type	Arbitrary Text	Edit	Site (Edit)	☐	☐	☐	☐	N/A	☐



Scope



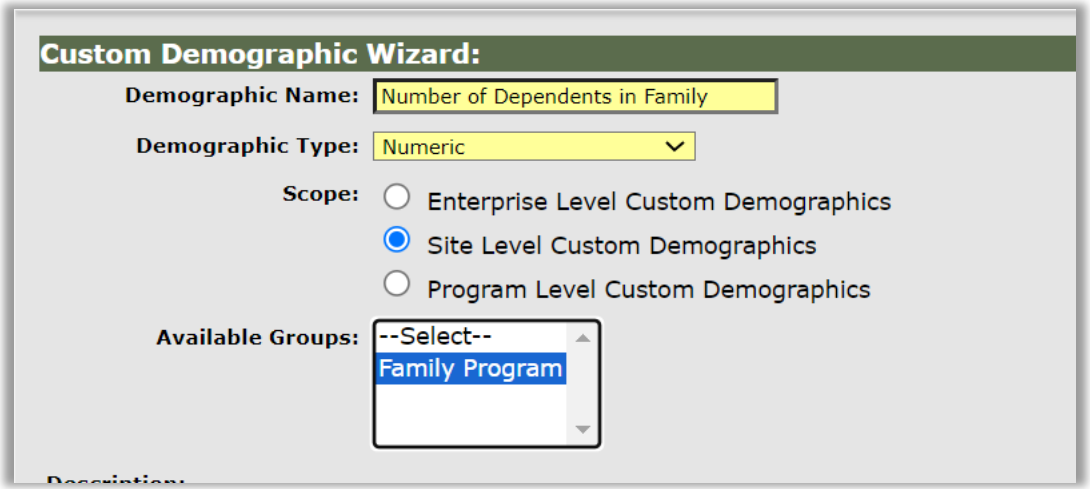
Custom Demographic Name	Type	Desc-rip-tion	Access Level	Required	Disabled	View Only
Are you a Veteran?	Defined Text Values	Edit	Enterprise	☐	☐	☐
Emergency Contact Phone number and Type	Arbitrary Text	Edit	Site (Edit)	☐	☐	☐
English Proficiency	Defined Text Values	Edit	Program (Edit)	☐	☐	☐
Gender Identity	Defined Text Values	Edit	Program (Edit)	☐	☐	☐
What is your primary language	Defined Text Values	Edit	Program (Edit)	☐	☐	☐



Program Groups

Program Groups

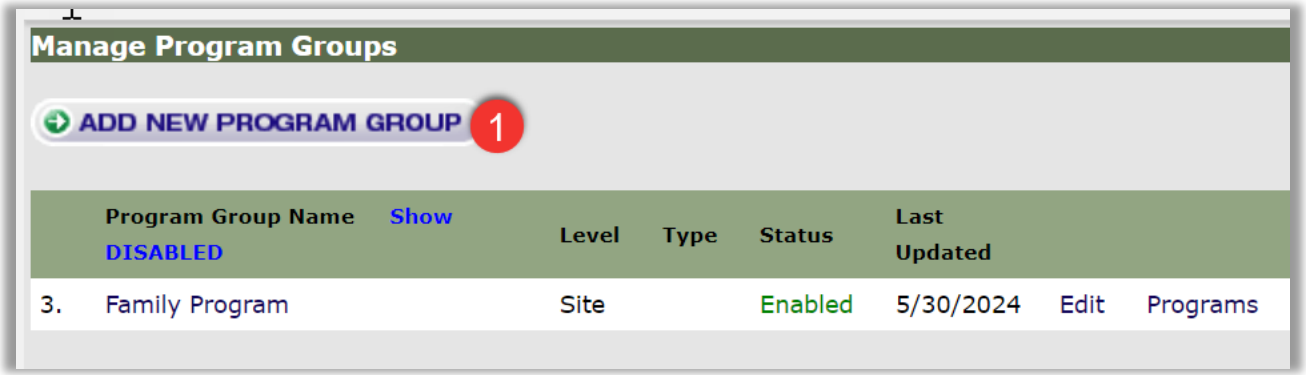
- Used with Enterprise & Site Level Demographics
- Narrows the scope of field
- Provides flexibility

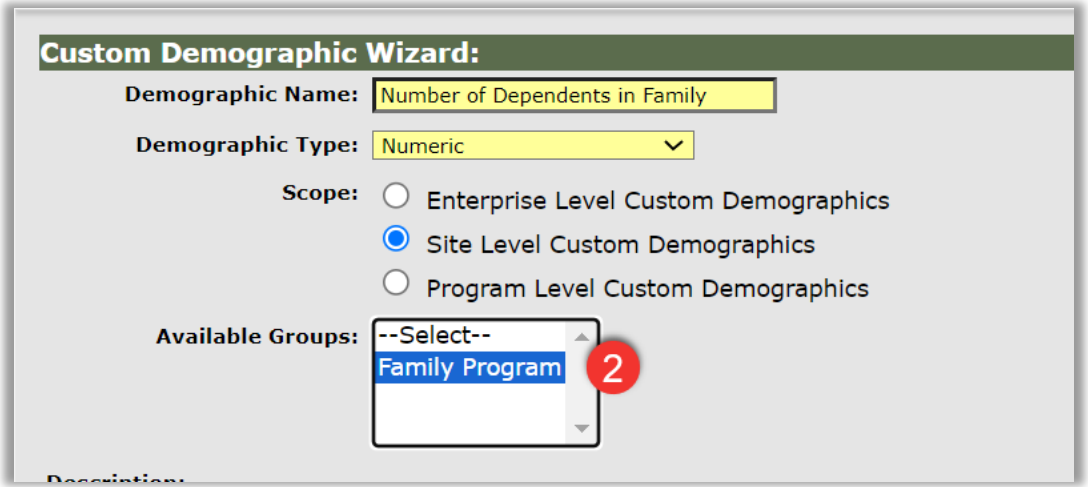


Program Groups

2 Steps

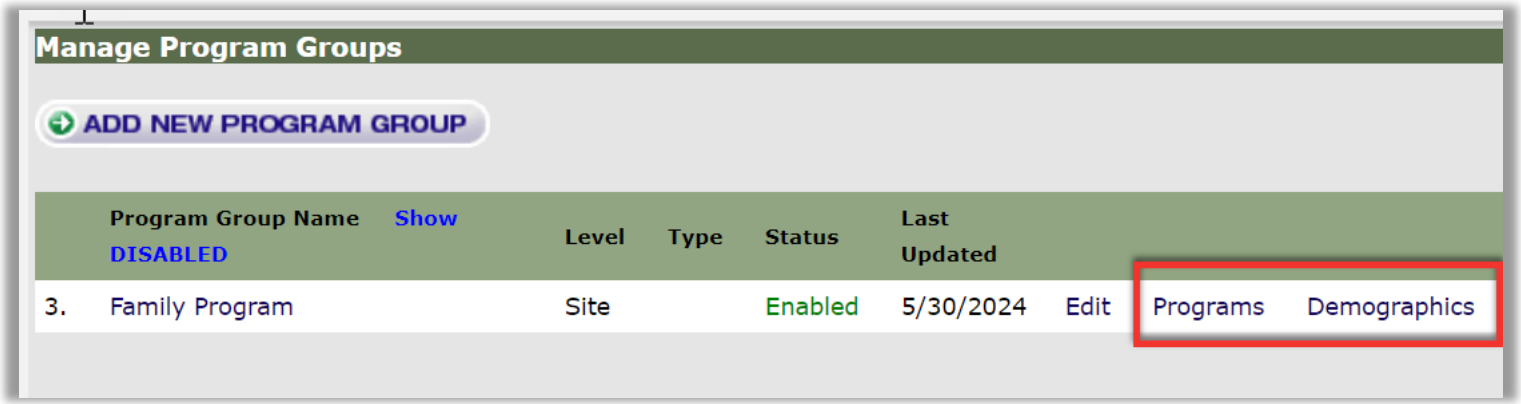
1. Create Program Group
2. Apply Program Group





Program Groups

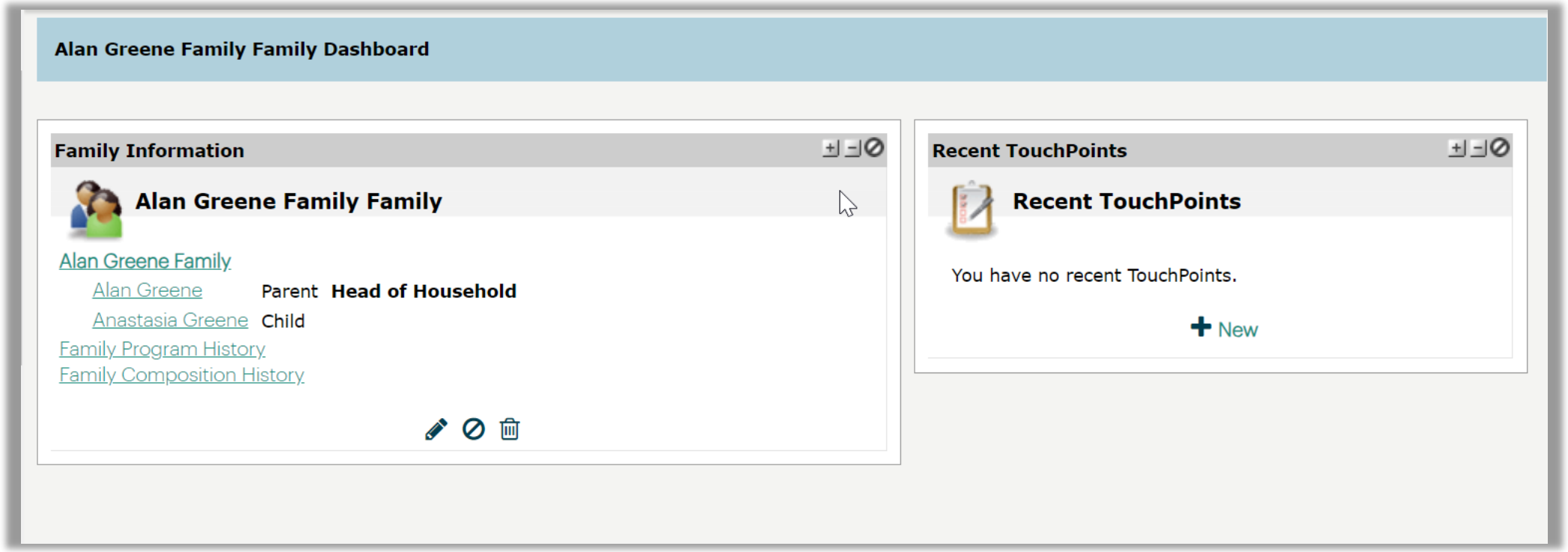
- Manage Program Groups
  - Demographics shows assigned demographics
  - Programs shows assigned sites and or programs.



Family Demographic Relationships

Family Demographic Relationships

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



Family Demographic Relationships

Steps

1. Select Manage Demographics.

2.Select Manage Family Demographics.

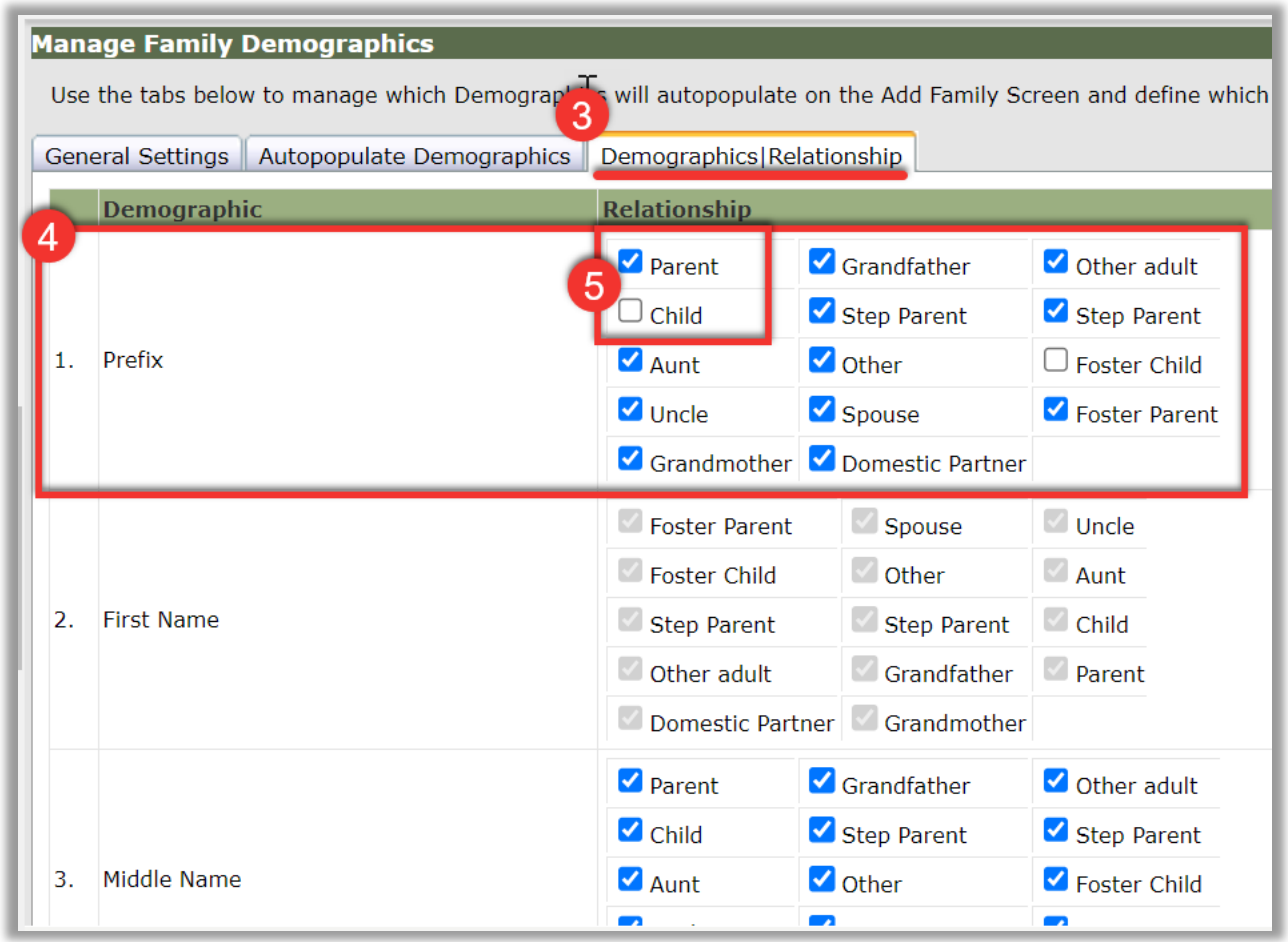
3.Go to the Demographics Relationship tab.

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.



Keep In Mind

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

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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.

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