

Participant Groups Across the Enterprise

We Will Begin Shortly

Meet Your Trainer

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Learning Objective

This session will support users in understanding how the Family and Collections features interact across the Enterprise.

Agenda

Enterprise Enroll

Site to Site Referrals

Collections

Enterprise Enroll

Enterprise Enroll

Pull Family demographics & relationships from other sites into your site

Enable Enterprise Settings

Enable Demographic Settings

Enroll a Participant in Family Services

[Search Settings](#) [Search Help](#)

Search for a participant or family to enroll based on your search settings
Participant search will return results based on: Full name, CaseNumber, CellPhone, EMail, SSN
Family search results will return results based on: Family Name

Only one field will be used to search at any given time.

Participant Search

Family Search

[Search](#)

Below are all participants who are not currently enrolled in Family Services with a family name like 'jones'.

FAMILY NAME							
John Jones Family							
<input checked="" type="checkbox"/>	RELATIONSHIP	NAME	EMAIL	SSN	CASE NUMBER	DOB	HOME PHONE
<input checked="" type="checkbox"/>	Child	Joy Jones			10450		
<input checked="" type="checkbox"/>	Parent	John Jones	laughoutloud@yahoo.com		10449	7/13/1970	
+ Suzie Jones Family							

Enterprise Enroll

Steps

1. Enterprise Enroll
2. Search for Family
3. Click the toggle to view members
4. Select desired family members
5. Enroll with Different or same start date
6. Continue
7. Enter date
8. Click Enroll Participants

Enroll a Participant in Family Services

Search Settings Search Help

Search for a participant or family to enroll based on your search settings
Participant search will return results based on: Full name, Case Number, CellPhone, EMail, SSN
Family search results will return results based on: Family Name

Only one field will be used to search at any given time.

Participant Search

Family Search Calvert

Search

Below are all participants who are not currently enrolled in Family Services with a family name like 'Calvert'.

FAMILY NAME

Calvert

Calvert Family

RELATIONSHIP	NAME	EMAIL	SSN	CASE NUMBER	DOB	HOME PHONE	CELL PHONE	SITES ENROLLED
<input checked="" type="checkbox"/>	Child	Kayoe Calvert		10336	1/1/1968			XYZ Services
<input checked="" type="checkbox"/>	Child	Marcelo Calvert		10283	1/1/1968			XYZ Services
<input checked="" type="checkbox"/>	Parent	Alan Calvert		10304	1/1/1968			CH Baltimore EAB 11/15/16, XYZ Services
<input checked="" type="checkbox"/>	Parent	Iselinda Calvert		10312	1/1/1968			XYZ Services

Enroll Selected Participants with Different Program Start Dates

Enroll Selected Participants with Same Program Start Dates

Continue

Site to Site Referrals

Site to Site Referrals

- Refer a Family from your site to another
- Set Referral Form for Family
- Accept Referral Program Setting
- Enable Share and Accept Data points Demographic Settings

Add Referral

Select Participants Referral Form Provider Search Confirmation

Previous Next

Show all ineligible programs/entities

Butler Family

<input type="checkbox"/> REFER	SITE	PROVIDER	TYPE	DESCRIPTION	SERVICES PROVIDED
<input checked="" type="checkbox"/>		All Children First Eaton NJ	Alice Test Program	Program	Basic Needs, Counseling, Drug Abuse Treatment, Eviction Rent Assistance, Legal, Medical, Public Benefits, Veterinary Assistance
<input type="checkbox"/>		Liang's Aid Society East	Case Managment	Program	
<input type="checkbox"/>		Theresa's Assistance			

Site to Site Referrals

Steps

1. Add Referrals
2. Select Referral Form & Subject Type
3. Select Referral to Programs Only
4. Search & Select The Family
5. Complete the Referral Form
6. Select desired program(s)
7. Select Members to be referred
8. Click Confirm

The screenshot shows a web application interface for adding referrals. At the top, there is a progress bar with four steps: 'Select Participants', 'Referral Form', 'Provider Search', and 'Confirmation'. The 'Referral Form' step is currently active. Below the progress bar is a header 'Add Referral'. The main content area includes a dropdown menu for 'Select Referral Form' set to 'Saving Community NY Referral Form'. Below this are radio buttons for 'Make Referral To': 'Both Programs and Entities', 'Programs Only' (which is selected), and 'Entities Only'. A 'Next' button is positioned to the right. Below the form is a 'Families' section with a checkbox for 'Include Dismissed Families'. A table below shows a list of families with columns for 'FAMILY NAME' and 'ACTIVE MEMBER COUNT'. The first row shows 'Butler Family' with a count of 3. The table has a page size of 50 and is on page 1 of 1.

<input type="checkbox"/>	FAMILY NAME	ACTIVE MEMBER COUNT
1 <input type="checkbox"/>	Butler Family	3

Collections

Collections

Collection Types are Site Wide

Collections are Program Specific

Cannot Enterprise Enroll nor Refer

The screenshot displays a dashboard for 'Play and Learn' with an 'Edit Dashboard' button in the top right. It features three main sections:

- Collection Information:** Titled 'Children Classes Information', it lists:
 - Children Classes Name: Play and Learn
 - Number of members: 7
 - Class Room: Room 2
 - Teacher: Ms. Nichola
 - Meeting Days: Tues|Thurs|Below the list are icons for edit, delete, and trash.
- Collection Members:** Titled 'Children Classes Members', it shows a list of names with links:
 - Name
 - [Aeron, Hank](#)
 - [Able, Jane](#)
 - [Ahmed, Alex](#)
 - [Cork, Johanne](#)
- Collection TouchPoints:** Titled 'Collection TouchPoints', it contains the text 'You have no recent TouchPoints.' and a '+ New' button.

Collections

Members in the Collection vary
Enterprise Enroll Participants
Recreate the Collection

The screenshot displays a dashboard titled "Play and Learn's Dashboard" with an "Edit Dashboard" button in the top right corner. The dashboard is divided into three main sections:

- Collection Information:** This section is titled "Children Classes Information" and contains the following details:
 - Children Classes Name: Play and Learn
 - Number of members: 7
 - Class Room: Room 2
 - Teacher: Ms. Nichola
 - Meeting Days: Tues|Thurs|At the bottom right of this section are icons for edit, delete, and trash.
- Collection Members:** This section is titled "Children Classes Members" and lists the following names:
 - [Aeron, Hank](#)
 - [Able, Jane](#)
 - [Ahmed, Alex](#)
 - [Cork, Johanne](#)
- Collection TouchPoints:** This section is titled "Collection TouchPoints" and contains the text "You have no recent TouchPoints." with a "+ New" button below it.

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.