

Managing Duplicate Records Guide

A Guide For EZVolunteer Administrators for Duplicate Profile Clean-Up

To use the workflows described in this guide you must have an EZVolunteer account and that account must be assigned to the administrative role VMS_Admin. This role will give you access to the necessary modules of EZVolunteer. Access to some modules in EZCommunicator are also needed. If you are unable to sign-in or navigate to the appropriate modules, contact your EZVolunteer administrator or Relatrix Support (support@relatrix.com.)

To access the Administrative Console of EZVolunteer follow these steps -

- 1. Sign-in to your account
- 2. Click Admin, in the upper right corner of the page to get to the administration console
- 3. Check for access to the Volunteer Module in the left Menu
- 4. Check for access to the **User** Module in the left Menu

Importance of Cleaning-up Duplicates

It is important to clean up the duplicate profiles in your system for many reasons.

- 1. If you run background checks, Real-time or Batch submittal, the duplicates will increase the number of checks you are charged for.
- 2. Volunteer with duplicate profiles will have difficulty getting signed in properly and it will may have issues with volunteer badges when scanning into the Kiosk.
- 3. Total Volunteer versus User counts will not be accurate. If you have duplicates your total counts will not be accurate for reporting etc.

How Duplicate Profiles are Identified

There are several places to find whether you have duplicate profiles in your database:

1. **Review from Real-time Screening List** - During volunteer registration if a volunteer registers who is already in the database, the system will add that record to the Review from Real-time Screening List with PENDING (tan color) status. It will not process a background check (if you have Real-time Screening enabled) and it will not put the New Duplicate Volunteer Profile into your Active Volunteer List.



Fx: 720.457.3886

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<u>,</u>			Contact	Partner	vipin.agarwal@arcscorp.com	*Administration Building	07/01/2015	01/01/1980	07/01/2015	-	-	•	Pending
		2	Franke	Mark	mfranke@relatrix.com	*Administration Building	06/30/2015	01/01/1970	06/30/2015	-		-	Pending
E		2	Harris	Donna	donna.harris@amaisd.org	*Administration Building	08/15/2016	10/22/1966	08/15/2016		-	-	Pending
2		2	Kuch	Dill	jkuch@relatrix.com	*Administration Building	08/31/2016	12/15/1976	08/31/2016	-	-	-	Pending
3		2	Patrick	Jason	jasononkeys@gmail.com	*Administration Building	08/16/2016	11/23/1973	08/16/2016	-	-		Review
Ì		2	Schooler	Melissa	mmm1@suddenlink.net	Demo Elementary	08/15/2016	11/24/1962	08/15/2016				Pending

The message you would see if you viewed the results for a duplicate volunteer would be: *This volunteer name and date of birth already exist in the database. Please check for duplicate records and resubmit, as needed.*



2. A Volunteer cannot see the Volunteer Module in their My Account Page - A volunteer with a duplicate record may not have access to the Volunteer tab when they sign-in to their account, even if they have previously registered. This is most likely to occur if you use both our volunteer and contact management systems.



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User Profile Account Subscriptions	Account Cancel Sav	9
NEED MORE HELP? SEARCH OUR FAQs EMAIL SUPPORT@RELATRIX.COM	Account Details Username* UserProfile Password* Change Password	
TELEPHONE 800-570-6234	Name & Address First Name User Middle Name Last Name Profile Address	

3. **Duplicates On Your Volunteer List** - You may notice a duplicate on your Volunteer List that has the same name and phone number, but a different Username.

	Babbitt	Trevor	noemailaddress@noemailaddress.com	806-326-1111	TBabbitt33218195	
	Babbitt	Trevor	noemailaddress@noemailaddress.com	806-326-1111	TBabbitt26543256	

4. **Duplicates When Using 'Filter for Duplicates'** - You can filter for Duplicates in your User List to find duplicates by First/Last Name, Email Address or Home Phone. This will give an idea of the total number of duplicate records in your database. However, keep in mind that some families will use the same Email Address or Home Phone, and that you may have some duplicate First/Last Names that are not the same user.

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5		Butter	Trevor	normaladdrea@normaladdrea.com	806-326-1111		Theorem 543256				
3		Surresi.	Leaf	koburead-site.orr	00-00-000		koburred-eith.c	m.			
		Burrest	Local		729-969-8095		LBushese00156096				
		Tranke	Hark		313-999-4123		Mf1anka/99638229				
1		Practice	Mark	inflamike@relation.com	175-668-9428		hesPatriel		720-009-0105		
2		Parke	Mark		720-969-8035		MFranke79029804				
1		Aphe	347		806-326-1111		Role#1315247				
3		Rider.	347		806-584-5320		3Role/37704326				
6		Roler .	347		806-326-1215		Bole-0127508				



Duplicates in the Background Check list

In the Background Check Module, a Duplicate Volunteer is set as PENDING (tan color) and in the Review List and a notification is sent to the Volunteer Contact for the registered school. Typically you can do a quick search in the Volunteer list to see if the Volunteer already has an existing profile there. You can also do a quick search in the User Module to see if two profiles display there (you may have to select the 'Show Inactive Users' to have the duplicate display there.)

Once you have determined that a profile is a duplicate, you will want merge it with the original profile to remove confusion, keep your database clean and avoid the cost of paying for another background check.

To merge a duplicate in your Review List follow these steps -

- 1. Sign in to your account and click on the Admin button
- 2. Go to Utilities > Background Screening
- 3. Find the Review List where the duplicate volunteer is located
- 4. Choose Log Results to view the list
- 5. Select the duplicate volunteer's record and from the status dropdown choose 'OK Basic'

This will set their record to **GREEN** and reactivate their account on your volunteer list.

Next, go to the User Module of your system and do the following:

- 1. In the **LName** column of your user list type the name of the volunteer with the duplicate profile. This should display the original and duplicate record of the volunteer.
- 2. Select both the original and the duplicate records of the volunteer and from the Action Menu choose the option <u>'Merge Duplicates'</u>. This will display the details of both records on a single page with the option to choose data from either record.
- 3. Choose the option 'Select ALL' for the duplicate record (the one created second).
- 4. Then selectively use data from the original record if different from the duplicate. This would include the data related to the original profile background check and any hours that may have been recorded.
- 5. When done use the MERGE button to merge the two records.

This will create a record based on the duplicate profile's recordID and flag the other record for deletion. When your user list page is displayed you will need to Refresh by pressing F5 to redisplay.



Using the duplicate profile as the starting point will allow the volunteer to continue using the username and password they most recently created.

After merging duplicates you should end up with one volunteer record, with an approved background status and any hours still on their record from previous years of volunteering in your school district.

	User1 Select ALL	User2 Select ALL	Merged User
Jser Information Username/Password	 TBabbitt33218195 	 TBabbitt26543256 	TBabbitt33218195
Admin Role(s)		* *	·
Registered Interface	Relatrix Demo HQ	Relatrix Demo HQ	Relatrix Demo HQ
Name	Trevor Babbitt	Trevor Babbitt	Trevor Babbitt
Address	, co	, co	, CO
Primary Email	noemailaddress@noemailaddress.com	noemailaddress@noemailaddress.com	noemailaddress@noemailaddress.com
Secondary Email	۲	\bigcirc	
Home/Primary	806-326-1111	© 806-326-1111	806-326-1111
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School Relationships Merge From Both	Demo Elementary [Visitor]	Demo Elementary[Visitor]	Demo Elementary[Visitor]
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