

How to Identify Duplicate Applicants in Beam

- 1 Click "View details" under the program you are reviewing



Programs Dashboard

Applicants

Analytics

Funds

My assignments

Saved Views ▼

Cañada College SparkPoint ...

Coastside Hope

College of San Mateo (CSM)...

Daly City Community Servic...

El Concilio of San Mateo Co...

Fair Oaks Community Center

Jobtrain

Pacifica Resource Center

Peninsula Chinese Business ...

Puente de la Costa Sur

San Mateo County 101 Express Lanes Go Card Program [Test]

Programs

Go Card Program [View details](#)

Available Funds ⓘ	Obligated Funds ⓘ	Awarded Amount ⓘ
\$241	\$3,759	\$0

Go Card Program- 1 Year Recertification [View details](#)

Available Funds ⓘ	Obligated Funds ⓘ	Awarded Amount ⓘ
\$241	\$3,759	\$0

All Cases

Search

Filter

Page size: 15 ▼

< 1-15 of 92 >

Name	Submitted ▼	Program	Status	Tags	Assign
Demo Application 6 C000092608	—	Go Card Program	In Progress		No as

2 Click on a case ID

Peninsula Chinese Business ...	☐	C000092603	06/16/2026	Read
Puente de la Costa Sur	☐	Natalie Testing C000092595	07/01/2026	Read
Samaritan House	☐	Kim Comstock C000092544	07/20/2026	Read
Samaritan House South	☐	Demo Application C000092679	07/20/2026	Read
Self-Help for the Elderly	☐	Mia Logg C000092681	07/20/2026	Read
Skyline College SparkPoint ...	☐	Raul Test C000092682	07/21/2026	Read
YMCA Community Resource...				
other				
Settings				
Help				

3 A pop-out icon in the top right corner will appear next to the applicant's name. if a potential duplicate is detected.

Go Card Progr... > C000092679 • Demo Application


Case Overview
Application

Deny
...

This applicant may be a duplicate -- some of their details (e.g. name, date of birth, or address) match another account. Review before proceeding.

Review Fields

Field	Response	Actions
Preferred Payment Method	"virtualCard"	

Documents

+ Upload Document

Preview	Document type	Uploaded at	Pinned
		07/20/2026	

Details

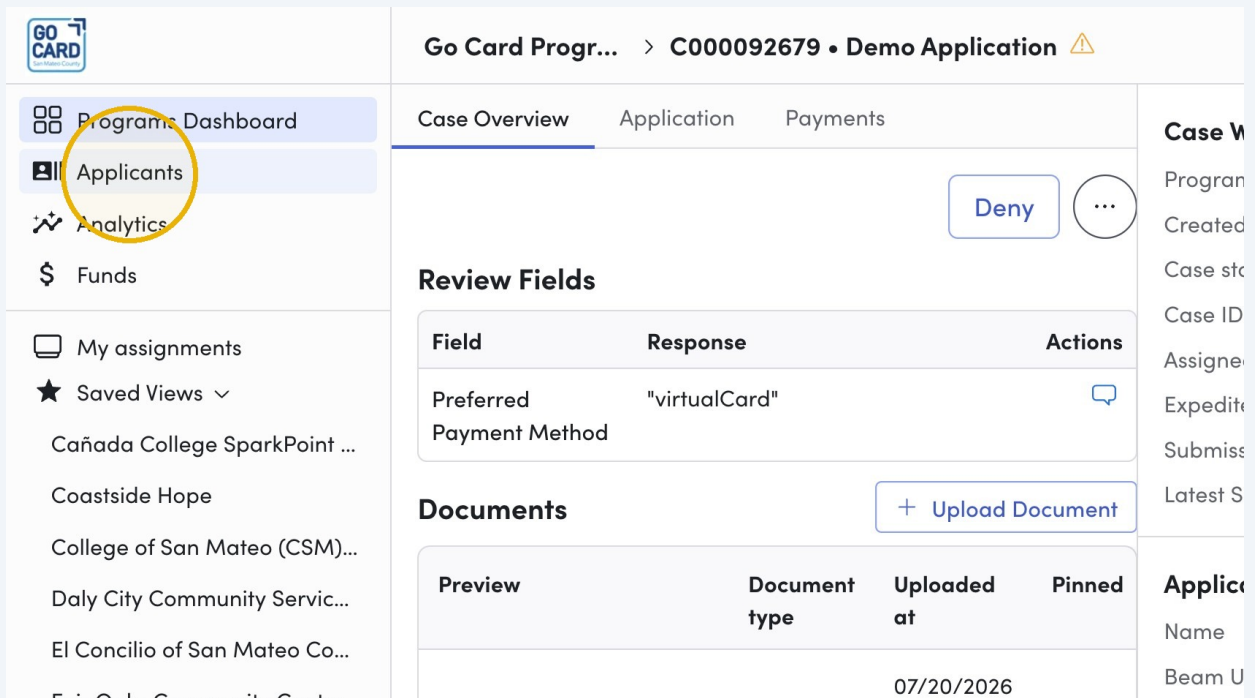
Program	Go Card Program
Created	7/20/2026
Case status	Ready for Review
Case ID	C000092679
Assignee	Unassigned
Expedited	No
Submissions	1
Latest Submission	7/20/2026, 4:06:37 PM

Applicant details

Edit

Name	Demo Application
Beam User ID	U000092852

- 4 Search for potential duplicate users under the "Applicants" tab in the sidebar.



Go Card Pro

Go Card Progr... > C000092679 • Demo Application

Case Overview Application Payments

Review Fields

Field	Response	Actions
Preferred Payment Method	"virtualCard"	

Documents

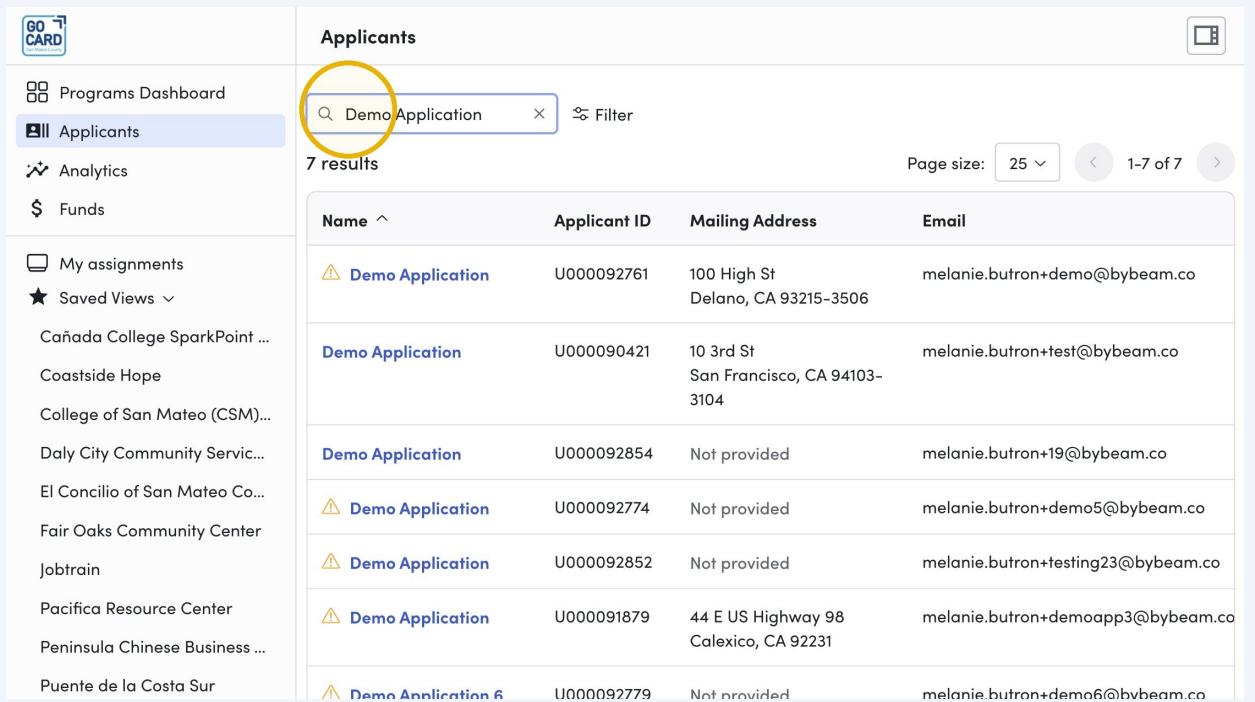
Preview	Document type	Uploaded at	Pinned
		07/20/2026	

Applicants

Program Created Case st Case ID Assigne Expedite Submiss Latest S

Applica Name Beam U

- 5 Type the applicant's name or email address in to the search bar to find potential matches.



Go Card Pro

Applicants

Search: Demo Application Filter

7 results

Page size: 25 1-7 of 7

Name ^	Applicant ID	Mailing Address	Email
Demo Application	U000092761	100 High St Delano, CA 93215-3506	melanie.butron+demo@bybeam.co
Demo Application	U000090421	10 3rd St San Francisco, CA 94103-3104	melanie.butron+test@bybeam.co
Demo Application	U000092854	Not provided	melanie.butron+19@bybeam.co
Demo Application	U000092774	Not provided	melanie.butron+demo5@bybeam.co
Demo Application	U000092852	Not provided	melanie.butron+testing23@bybeam.co
Demo Application	U000091879	44 E US Highway 98 Calexico, CA 92231	melanie.butron+demoapp3@bybeam.co
Demo Application 6	U000092779	Not provided	melanie.butron+demo6@bvbeam.co

6 Navigate to the "Applicants" section and search for the user in question.

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Coastside Hope

College of San Mateo (CSM)...

Daly City Community Servic...

El Concilio of San Mateo Co...

Fair Oaks Community Center

Jobtrain

Pacifica Resource Center

Peninsula Chinese Business ...

Puente de la Costa Sur

Samaritan House

Q Demo Application X Filter

7 results

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Demo Application	U000092854	Not provided	melanie.butron+19@bybeam.co
 Demo Application	U000092774	Not provided	melanie.butron+demo5@bybeam.co
 Demo Application	U000092852	Not provided	melanie.butron+testing23@bybeam.co
 Demo Application	U000091879	44 E US Highway 98 Calexico, CA 92231	melanie.butron+demoapp3@bybeam.co
 Demo Application 6	U000092779	Not provided	melanie.butron+demo6@bybeam.co

7 Click on a potential duplicate user to see the status of their previous application.

In this case, they have a different application under a different user that is already Approved and paid.

GO CARD

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Puente de la Costa Sur

Applicants > U000092761 • Demo Application

Programs Applications Payments

+ Add New Application

Program Name	Program Status	Case Status	Remaining Funds	Referral
Go Card Program	Open	Approved	\$241	-
Go Card Program- 1 Year Recertification	ReferralOnly	Not Applied	\$241	Send Referral

Activity

Notes ⓘ [+ Add new note](#)

Applicant Overview [Edit](#)

Name Demo ...

User ID U0000...

Phone -

Email melanie.butron+demo@bybeam.co

Mailing Address 100 Hig...

Tax ID/SSN -

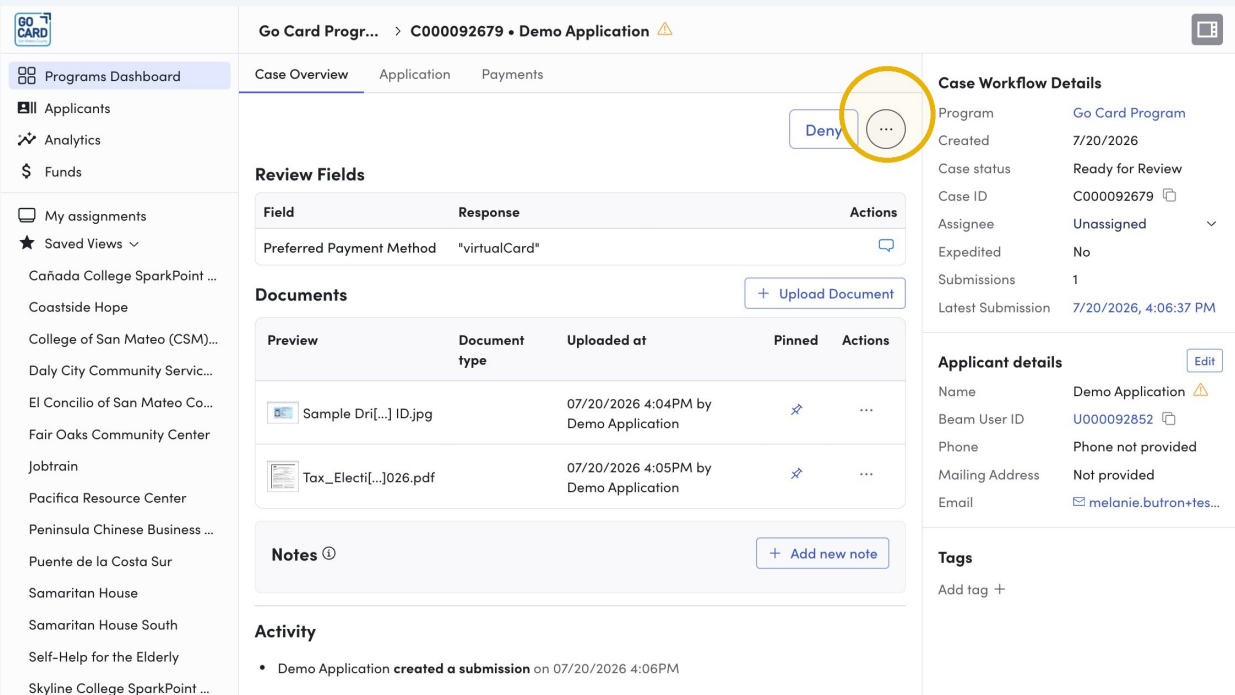
Date of Birth 01/01/2...

Additional Information

8

Since this user has already been approved for funding, the duplicate application can be archived.

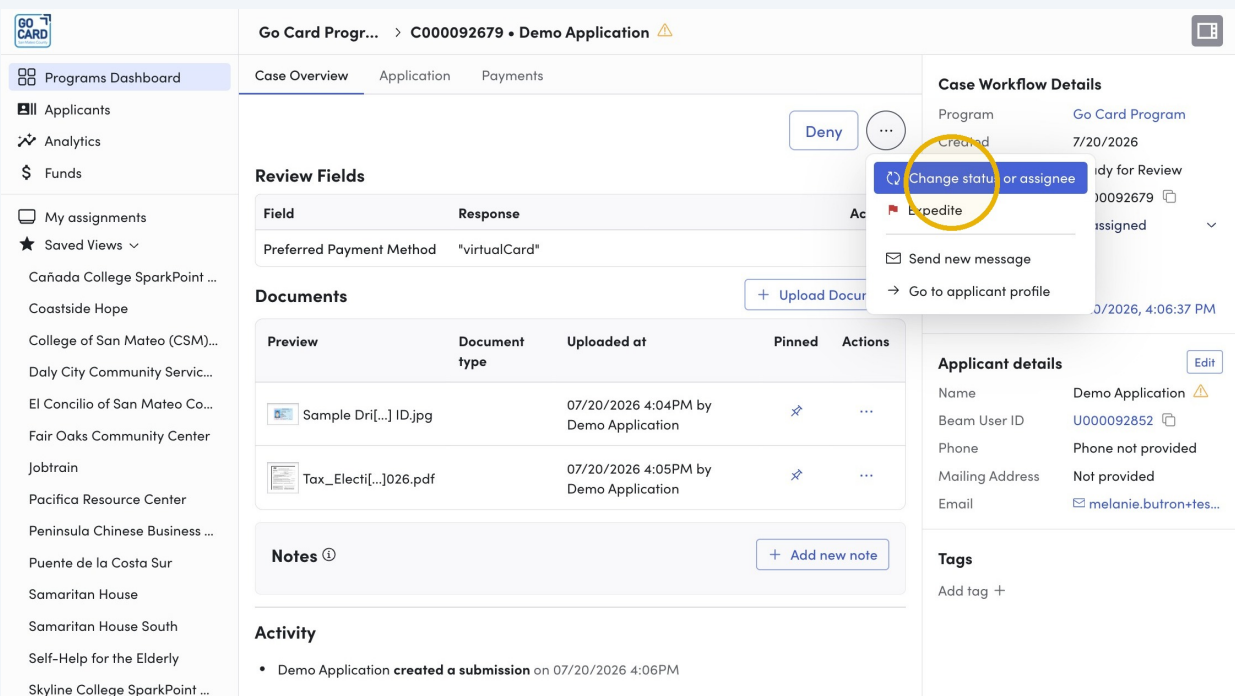
Click the three-dot menu on the case page.



The screenshot shows the Go Card Program interface for a specific application (C000092679 - Demo Application). The left sidebar contains navigation links like Programs Dashboard, Applicants, Analytics, Funds, My assignments, and Saved Views. The main content area has tabs for Case Overview, Application, and Payments. The Case Overview tab is active, displaying a 'Review Fields' table with 'Preferred Payment Method' set to 'virtualCard'. Below this is a 'Documents' section with two uploaded files: 'Sample Dri[...] ID.jpg' and 'Tax_Elect[...]026.pdf'. A 'Notes' section and an 'Activity' log are also visible. On the right, the 'Case Workflow Details' panel shows program information, status (Ready for Review), and applicant details. A yellow circle highlights the three-dot menu icon next to the 'Deny' button in the top right of the Case Overview section.

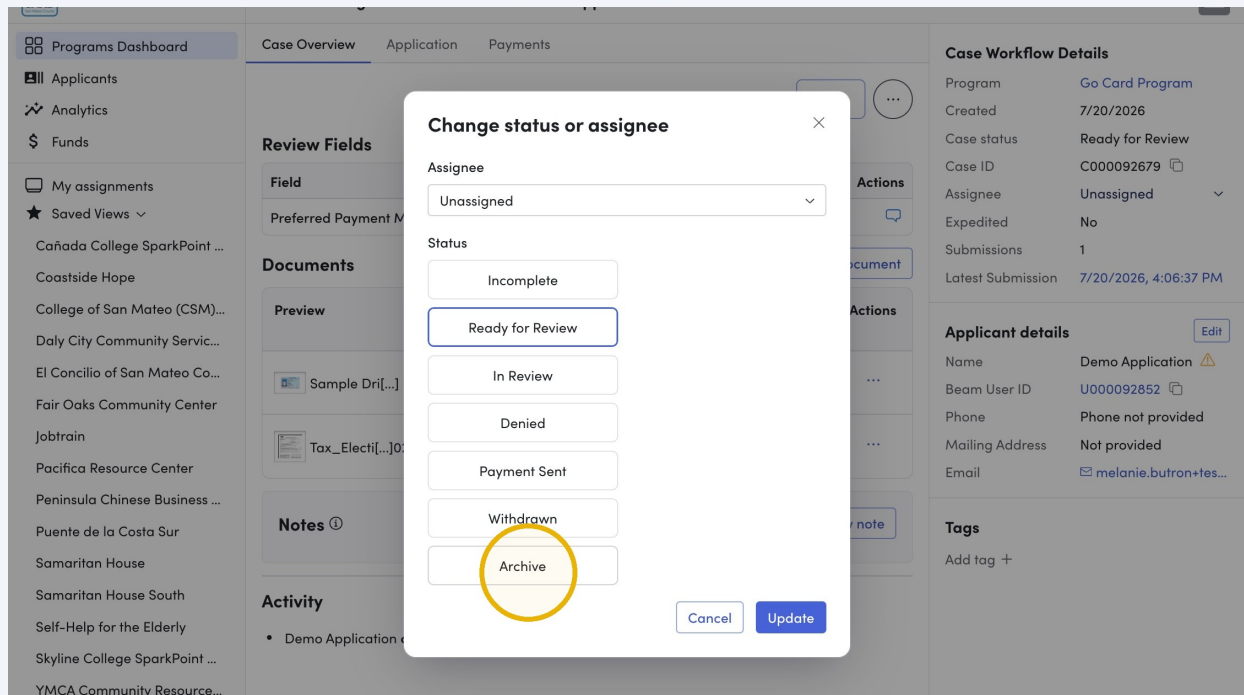
9

Click "Change status or assignee"



This screenshot shows the same Go Card Program interface as the previous one, but with the three-dot menu open. A yellow circle highlights the 'Change status or assignee' option in the dropdown menu. Other options visible in the menu include 'Expedite', 'Send new message', and 'Go to applicant profile'. The rest of the interface, including the sidebar, tabs, and various data panels, remains the same as in the previous screenshot.

10 Click "Archive"



11 Click "Update".

This will remove the duplicate application from the cases table.

