City of Oakland

Department of Violence Prevention

Apricot 360 Data Management System

Grantee Data Entry and Reporting Manual

Last Revised: June 2023

Thank you for using the DVP's Apricot 360 system. Accurate data is crucial for the DVP to report on how funds are being spent to various stakeholders including City Council, and is critical to the Measure Z evaluation to be able to demonstrate all the work that you do. Entering data on your services will allow the DVP and the City to understand the work that the DVP network does for violence prevention and intervention every single day.

Table of Contents

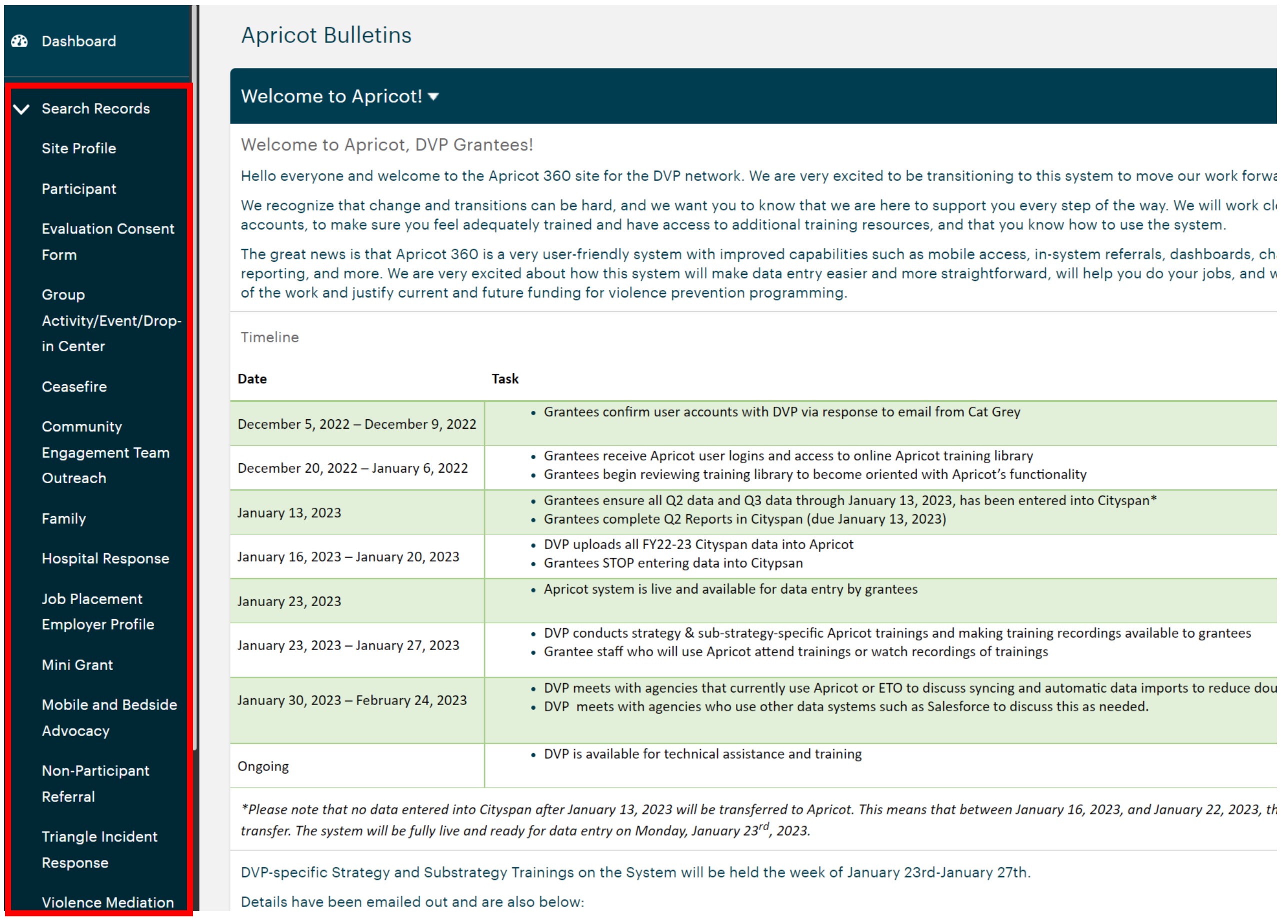
Important Notes on the Apricot 360 Data Management System

Data Entry and Deliverables

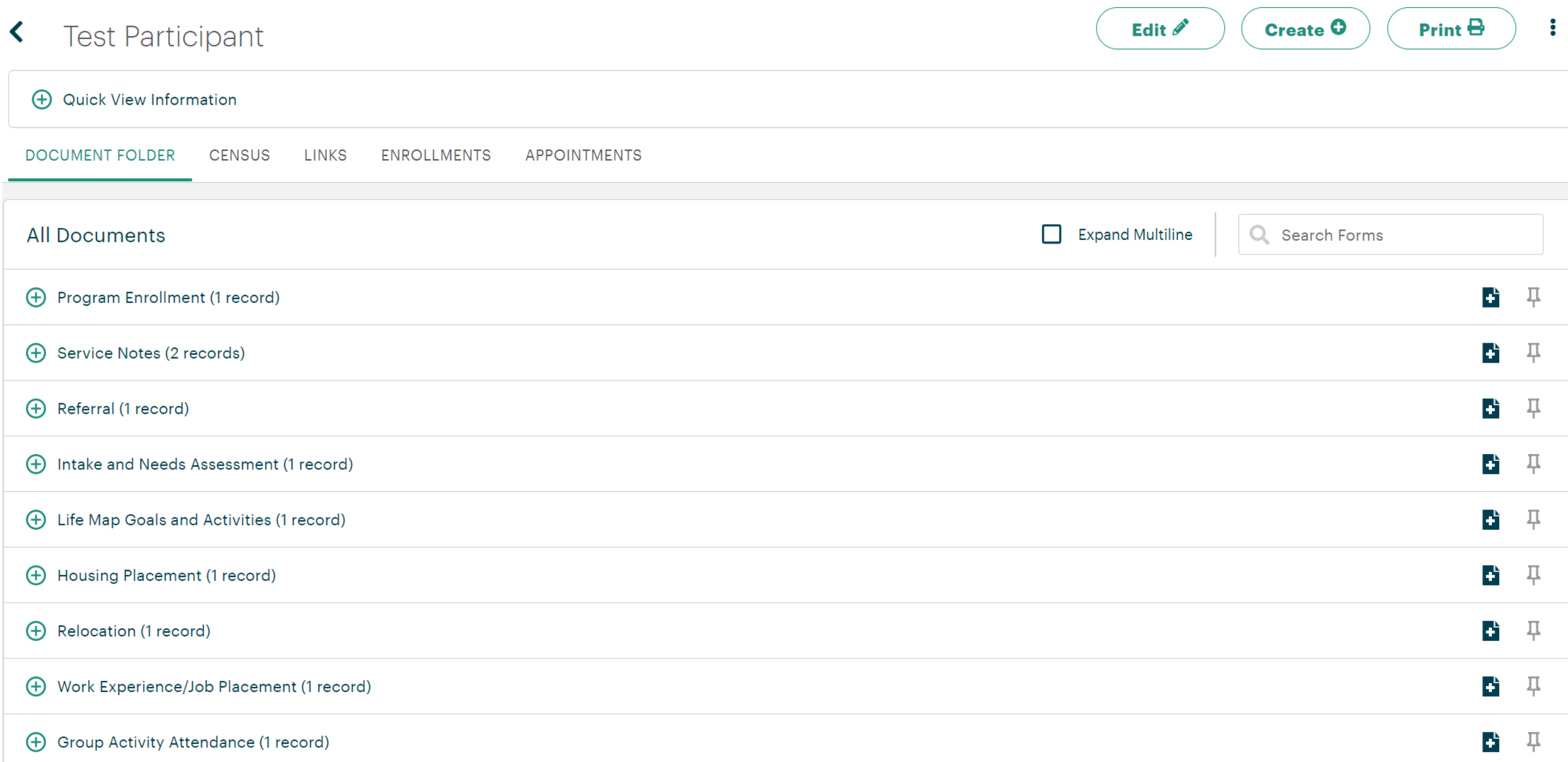
Nearly all deliverables are auto-counted in Apricot based on data entry. For example, the number of participants served pulls from the number of participants entered, and the number of service hours delivered pulls from the duration of service notes.

Folder Structure

Apricot is organized into Tier 1 and Tier 2 forms. Tier forms are like folders and Tier 2 forms are like pieces of paper in the folder. On the lefthand side you will see the Tier 1 forms you have access to. You will only have access to forms that are relevant to you.

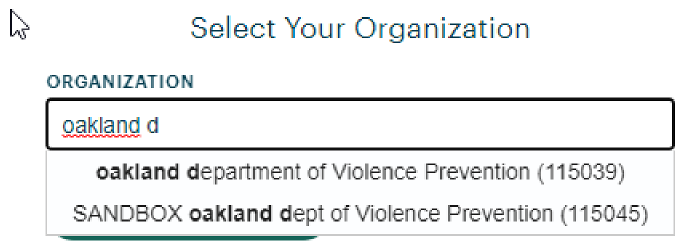


Tier 2 Participant Folder



Logging In

If your agency also uses Apricot as an internal data system, we advise setting (or resetting) your passwords for both Apricot systems to be the same. Once you have done that it will have you select which site to login to after entering your username and password. It will look similar to this:



Privacy and Security

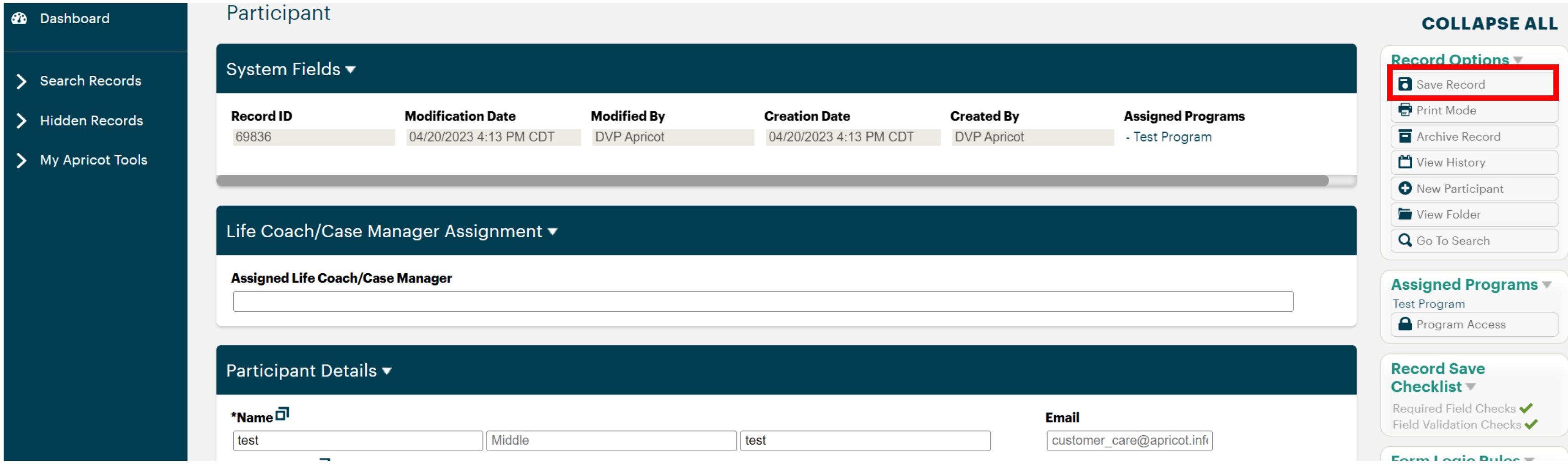
Apricot has comprehensive security measures in place and is compliant with the Health Insurance Portability and Accountability Act (HIPAA), the Family Educational Rights and Privacy Act (FERPA), United States Department of Housing and Urban Development (HUD) Domestic Violence standards, Homeless Management Information System (HMIS) standards, Social Security Administration data management and security protocols, and the Federal Risk and Authorization Management Program (FedRAMP) standards. This system has received review and approval from the Oakland City Council, the Public Safety Committee, and the Privacy Advisory Commission.

Only Data and Evaluation and specific Program Coordination staff and at the DVP have access to individual-level data, and all staff with this access maintain current certifications in data privacy, research standards, and HIPAA compliance.

Please note that if a participant is in multiple programs including yours, you will see the other DVP programs they are being served by, but you will not see any details of services provided at other agencies.

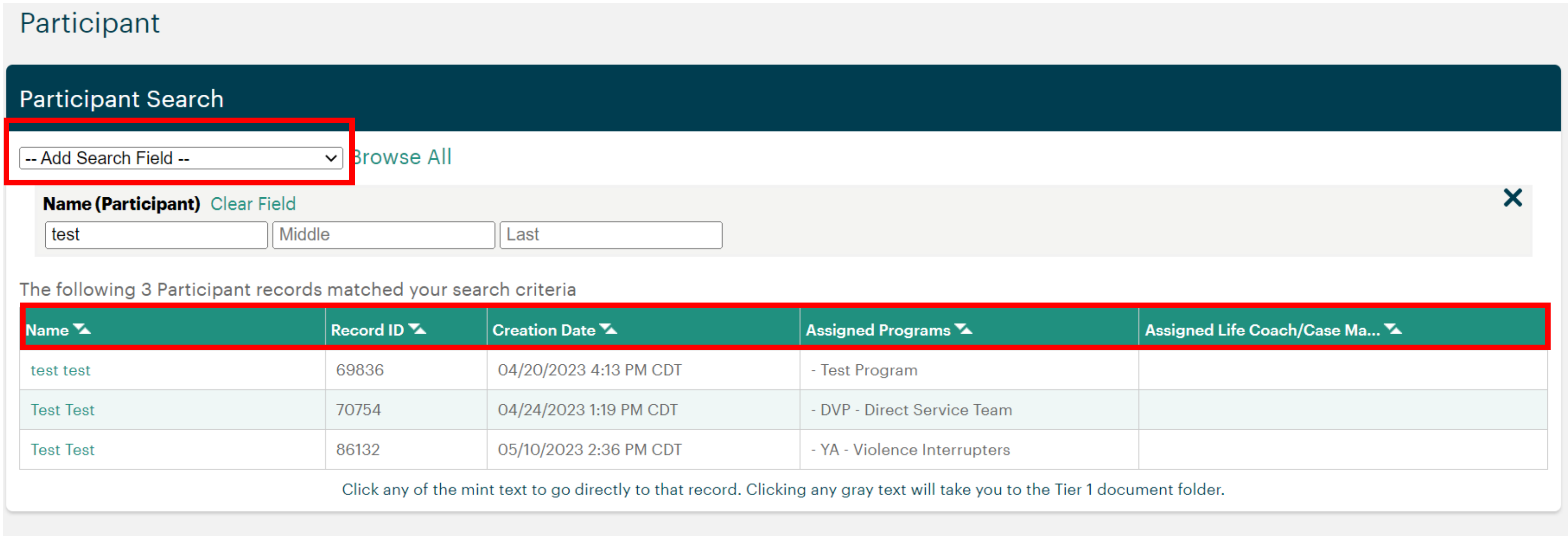
Saving and Returning to Records

To save records, click on ‘Save Record’ on the upper righthand side. You can always return to and edit saved records.



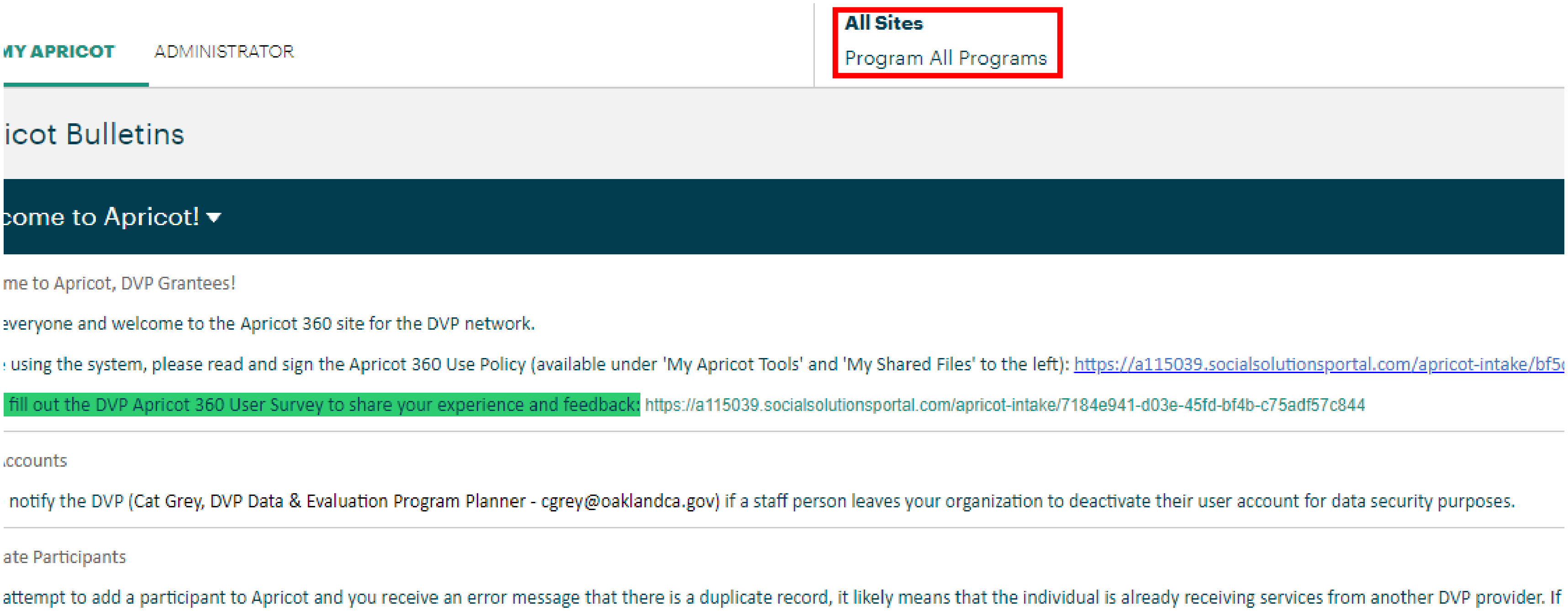
Searching for Records

To search for records, you can click ‘Add Search Field’ and search by various fields on that form as well as Tier 2 forms underneath that form. You can also sort by each column to alphabetize or order records by number or date.



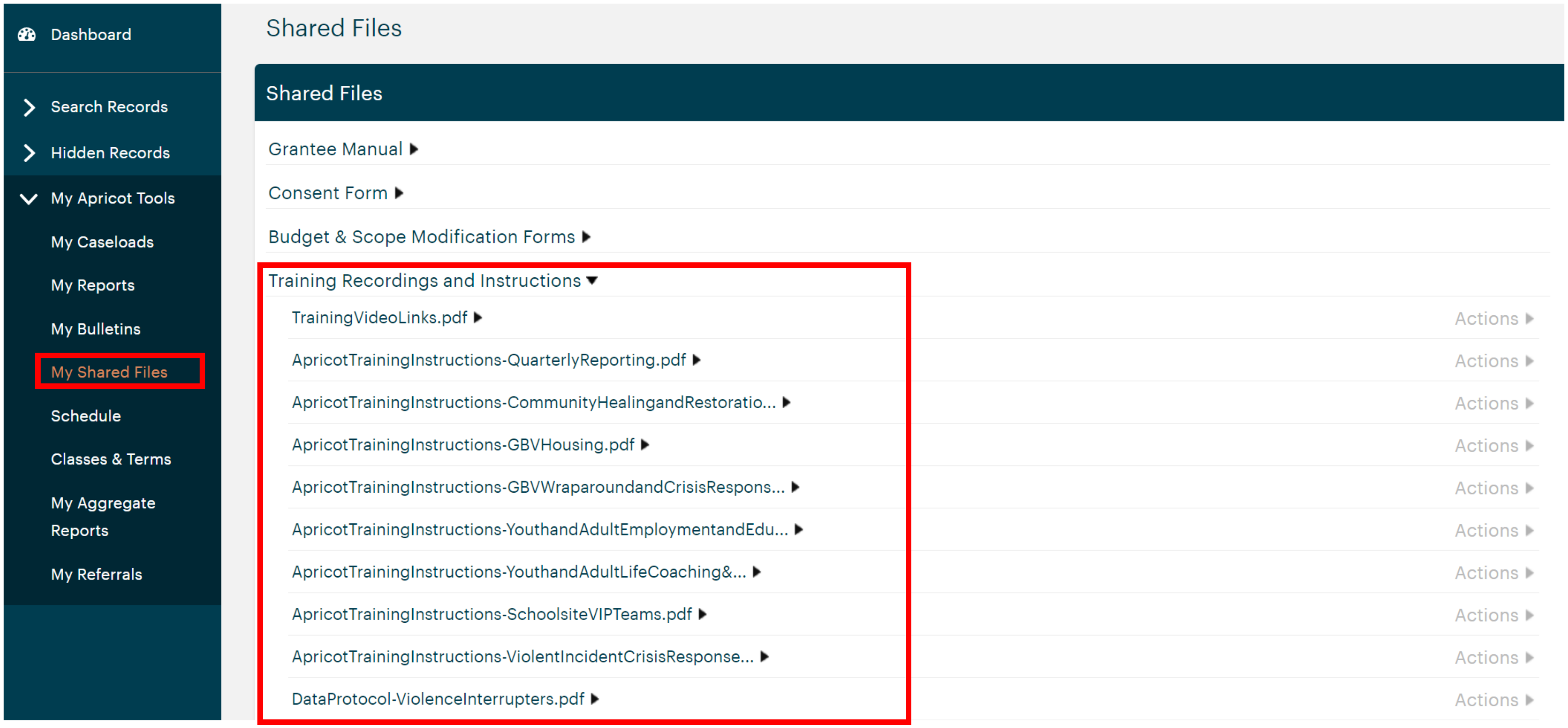
Sites and Programs

If you are a grantee with multiple contracts, always do the first step of navigating to that specific grant by click ‘all sites-all programs’ at the top.



Training, Support, and Technical Assistance

For support with Apricot, please first review the training materials, including this manual as well as recordings and instructions found on under ‘My Apricot Tools’ on the lefthand side and ‘My Shared Files’.



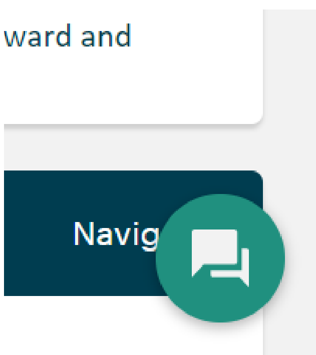
For convenience, training video links are listed below:

Training Video Links
Password to view videos: Apricot360!
Quarterly Reporting—https://vimeo.com/812515153
Community Healing – https://vimeo.com/794946371
GBV Housing – https://vimeo.com/795033451
GBV Wraparound Services & Crisis Response – https://vimeo.com/795037156
School-Site VIP Teams – https://vimeo.com/795068897
Violent Incident Crisis Response – https://vimeo.com/795393453
Youth and Adult Employment & Education – https://vimeo.com/794655461
Youth and Adult Life Coaching & Youth Diversion – https://vimeo.com/795390509

For additional support, grantees can reach out to DVP Data and Evaluation Staff and/or their Program Officer(s).

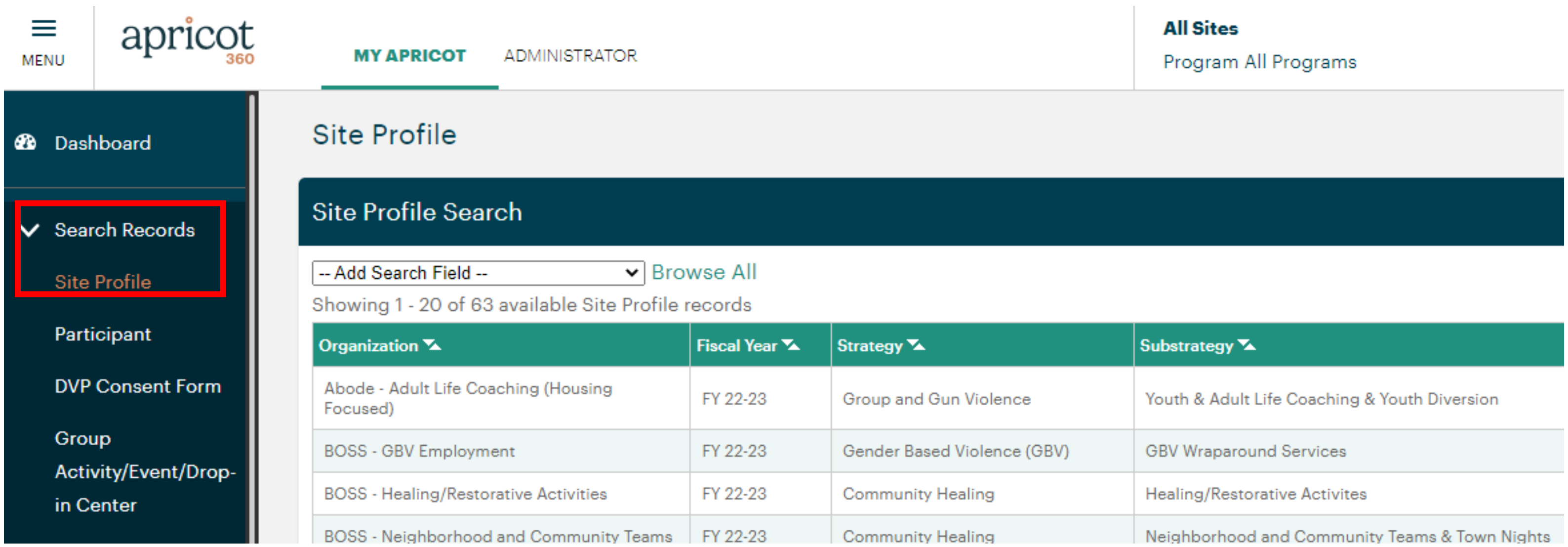
Grantees also have direct access to Apricot 360's chat support feature the bottom righthand of the screen.

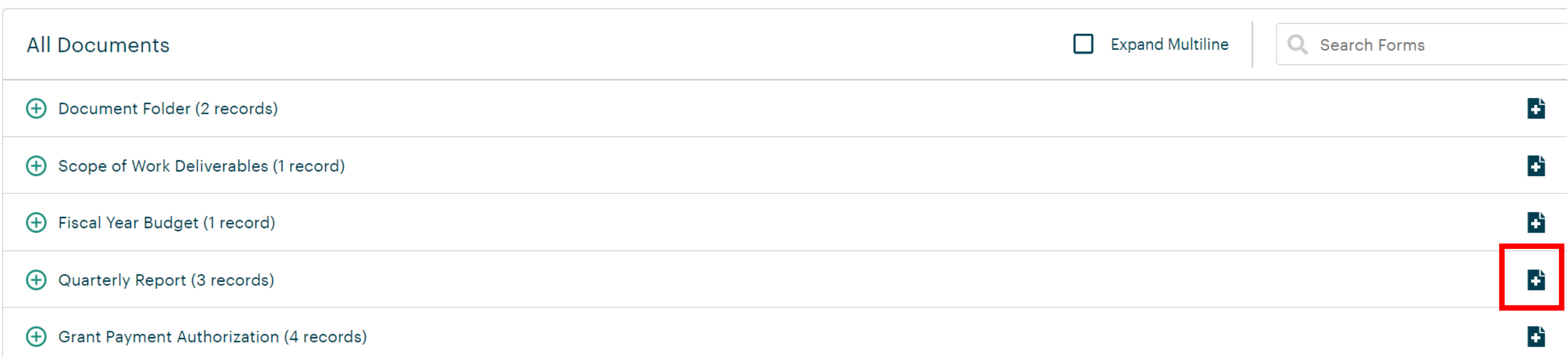
Please note that the DVP has a limited number of support cases available per year, so the feature may be turned off if it has been exhausted.



Quarterly Reports

Each grant in Apricot has a 'Site Profile', which includes the Scope of Work Deliverables, Fiscal Year Budget, Quarterly Reports, and Grant Payment Authorizations for that grant. To find the Site Profile, navigate to 'Search Records' on the left, and click 'Site Profile'. Then click on the relevant one to you.





You can view the Scope of Work Deliverables and Fiscal Year Budgets but you cannot edit them. To add a new Quarterly Report, click the blue and white 'plus' button on the righthand side.

To fill out the Quarterly Report, enter the Fiscal Year, Quarter, requested amount, narrative, and expenditures, and upload the Scope of Work Deliverables Report.

Main ▾

***Fiscal Year**

--Please Select--

***Quarter**

- ○ Q1
- ○ Q2
- ○ Q3
- ○ Q4
- ○ Q5

This field is required.

***Current Quarter Requested Amount**

$1,000.00

Please give a brief explanation if payment request amount differs from your scheduled payment.

Notes

Narrative ▾

Please briefly highlight any significant successes or milestones achieved this reporting period. You may include a case study describing a participant's issues and successes in your program. (A case study is required in the 3rd Quarter report. Do not include real client names, you must use a fake name, (e.g., Jane Doe).)

Major Successes

Notes

Please briefly describe any significant problems or barriers you experienced and how you plan to overcome them. Did these problems or barriers hinder your organization's ability to meet your deliverable goals? If so, how?

Major Obstacles

Notes

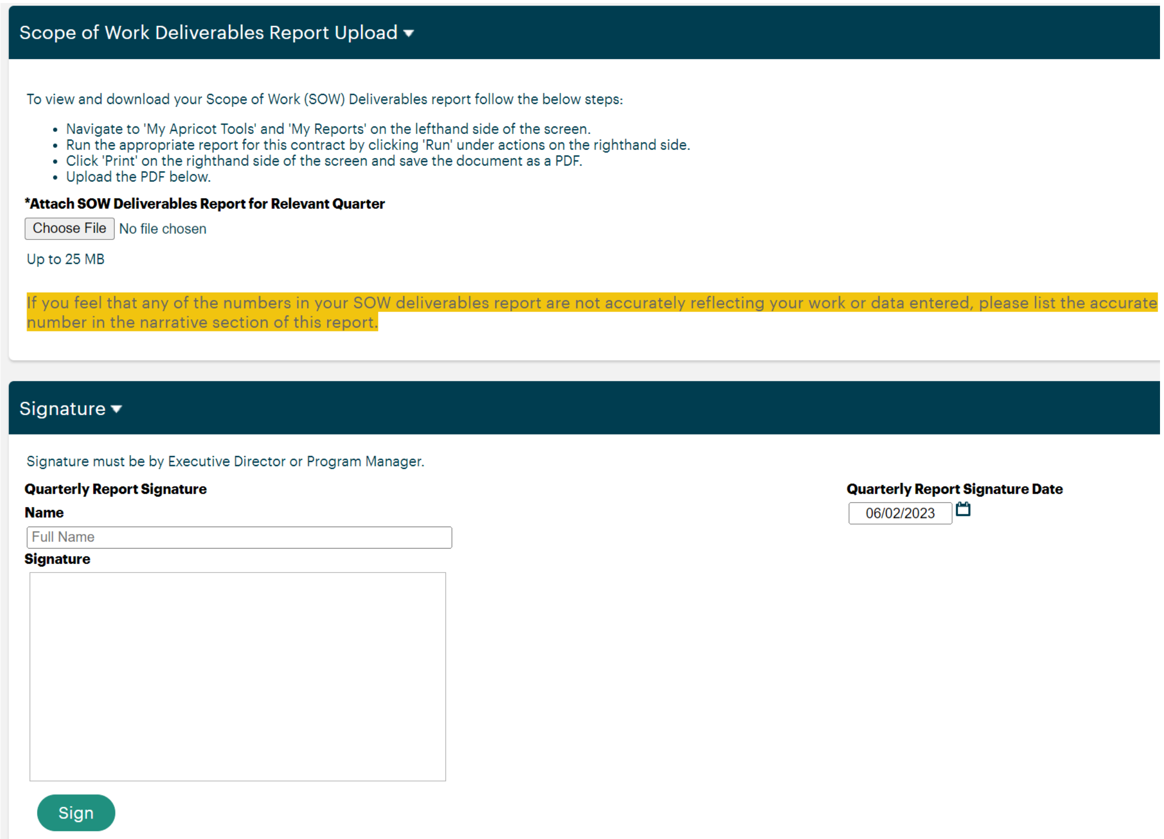
Spend Down ▾

Positions	Quarterly Expenditures	Fiscal Year Budget (click 'Link' at bottom of form for fields in this column to autopopulate)
Position - A	**Position - A - CURRENT** $1,000.00	**Position - A - FY Budget** $1,000.00
Position - B	**Position - B - CURRENT** $1,000.00	**Position - B - FY Budget** $1,000.00
Position - C	**Position - C - CURRENT** $1,000.00	**Position - C - FY Budget** $1,000.00
Position - D	**Position - D - CURRENT** $1,000.00	**Position - D - FY Budget** $1,000.00
Position - E	**Position - E - CURRENT** $1,000.00	**Position - E - FY Budget** $1,000.00
Position - F	**Position - F - CURRENT** $1,000.00	**Position - F - FY Budget** $1,000.00
Position - G	**Position - G - CURRENT** $1,000.00	**Position - G - FY Budget** $1,000.00
Position - H	**Position - H - CURRENT** $1,000.00	**Position - H - FY Budget** $1,000.00
Benefits	**Benefits - CURRENT** $1,000.00	**Benefits - FY Budget** $1,000.00
Operating Expenses/Other	**Duplicating/Copying - CURRENT** $1,000.00	**Duplicating/Copying - FY Budget** $1,000.00
	Emergency Support Funds - CURRENT $1,000.00	**Emergency Support Funds - FY Budget** $1,000.00
	Equipment/Computer Upgrades - CURRENT $1,000.00	**Equipment/Computer Upgrades - FY Budget** $1,000.00
	Facility/Classroom Rental - CURRENT	**Facility/Classroom Rental - FY Budget**

To view and download your Scope of Work (SOW) Deliverables report follow the below steps:

- Navigate to 'My Apricot Tools' and 'My Reports' on the lefthand side of the screen.
- Run the appropriate report for this contract by clicking 'Run' under actions on the righthand side.
- Click 'Print' on the righthand side of the screen and save the document as a PDF.
- Upload the PDF in the designated location.

Once the report is complete and the Executive Director or Program Manager has signed at the bottom, the Program Officer will then get an automatic email notification that the report has been signed and is ready for review. They will then review and create a Grant Payment Authorization to process your payment.



Reviewing the Scope of Work Deliverables Report.

When reading the SOW Deliverables Report, only look at the sections that apply, which you can tell because they have their deliverable numbers by quarter. Compare the Q3 deliverable number to the 'actual' number below to see if they have met their deliverables.

For example, this deliverable applies as it has their quarterly numbers under the deliverable section. By Quarter 3, their deliverable was to serve 28 individuals, and they have served 34.

of individuals served (unduplicated) - Deliverable

Forms

Scope of Work Deliverables

Site Profile

Filters

Limit Sections

Organization	Q1 # of individuals served	Q2 # of individuals served	Q3 # of individuals served	Q4 # of individuals served
LFCD - Youth Career Exploration and Education Support	10	18	28	32

of individuals served (unduplicated) - Actual

Forms

Participant

Limit Sections

Distinct Record ID Values
34

Total Rows
34

This deliverable does not apply because it does not have their deliverable numbers.

*Please note that numbers may still appear in the actual sections even if they are not deliverables for that grant—you can ignore those but they may be interesting for you to know.

of individuals retained in permanent jobs for 90 days - Deliverable

Forms

Scope of Work Deliverables

Site Profile

Filters

Limit Sections

Q1 # of individuals retained in permanent...	Q2 # of individuals retained in permanent...	Q3 # of individuals retained in permanent...	Q4 # of individuals retained in permanent...
0	0	0	0

of individuals retained in permanent jobs for 90 days - Actual

Forms

Work Experience/Job Placement

Participant

Filters

Filter Logic

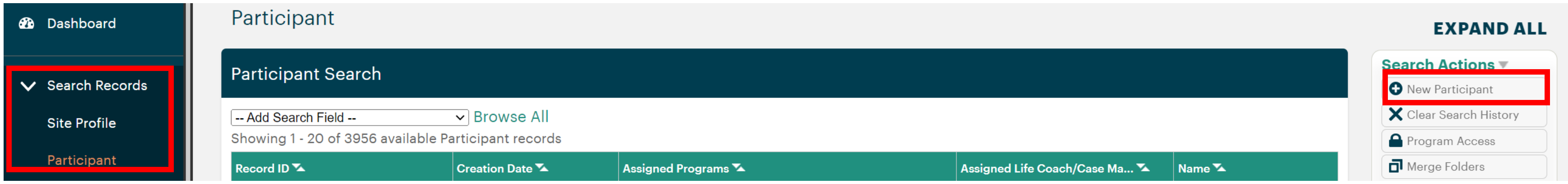
1 and 4 and (2 or (3 and 5))

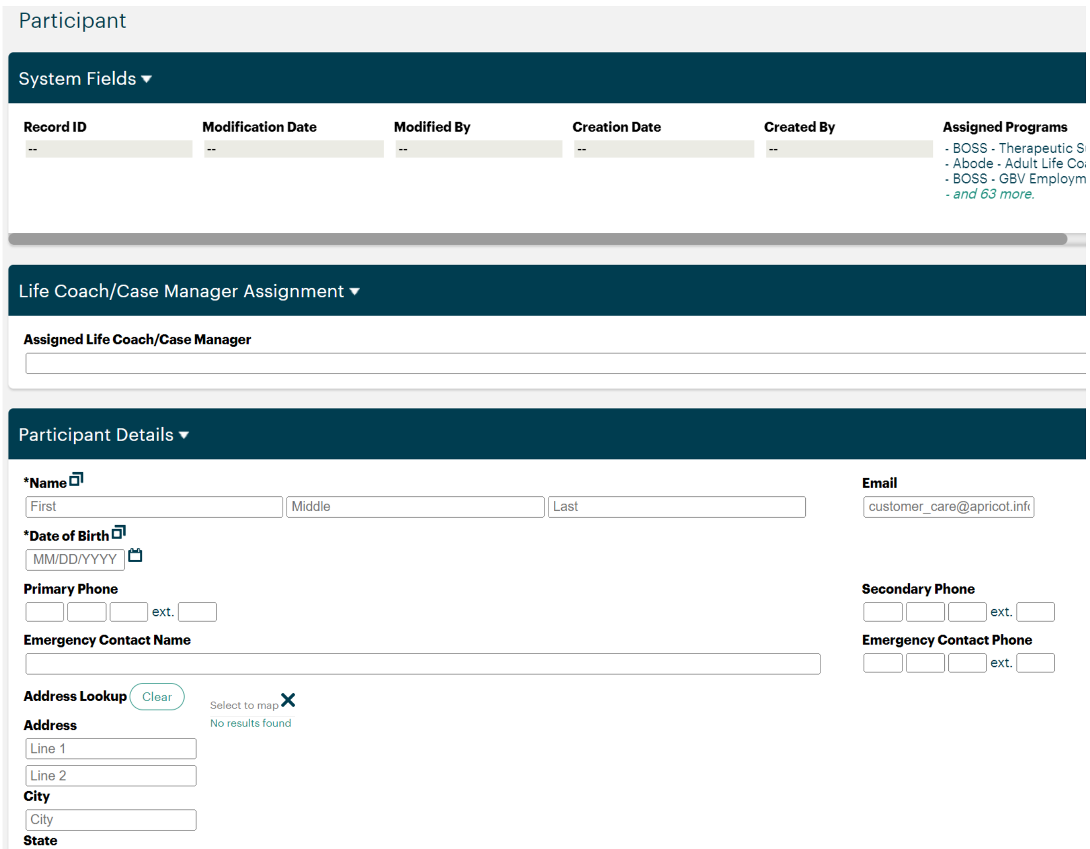
Limit Sections

Participant Record ID	Employment Status	Job Start Date	Job Start Days Ago	Job End Date	Job Retention Duration
Distinct Participant Record ID Values					

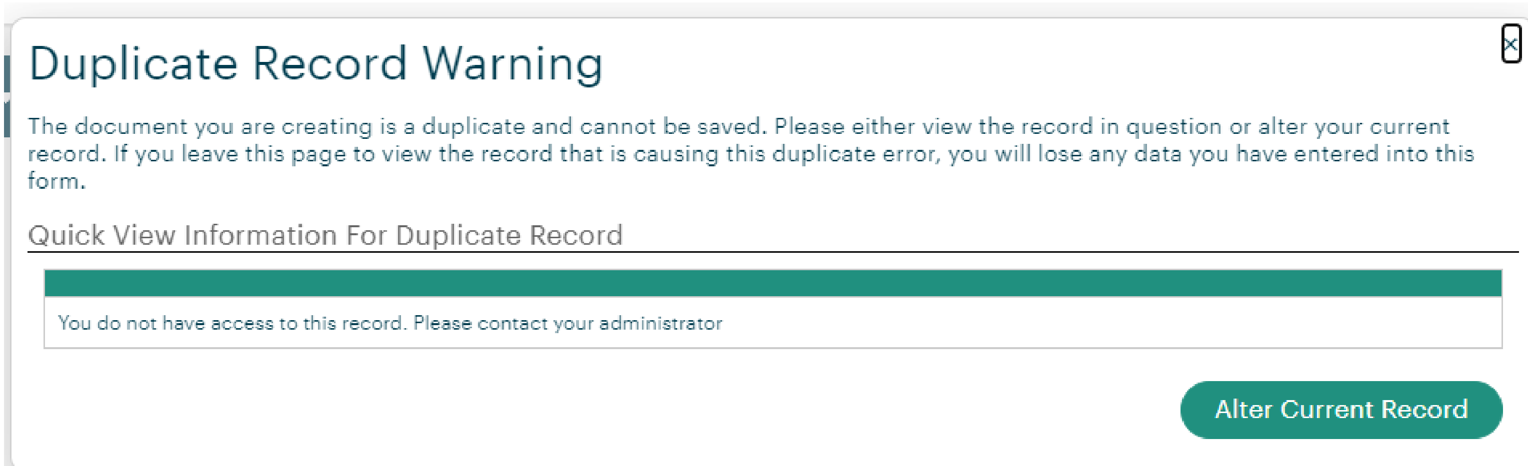
Participants

To enter a new participant, navigate to ‘Search Records’ on the lefthand side and click ‘Participant’, then ‘+ new participant’ on the righthand side. You will then enter their name and contact information as well as their demographics and their response to the consent form.





If you try to enter a participant who is already being served by another DVP program, you will receive a Duplicate Record Warning.



Duplicate Record Warning

The document you are creating is a duplicate and cannot be saved. Please either view the record in question or alter your current record. If you leave this page to view the record that is causing this duplicate error, you will lose any data you have entered into this form.

Quick View Information For Duplicate Record

You do not have access to this record. Please contact your administrator

Alter Current Record

In this situation, please fill out this form (also on the Apricot front page) and the DVP will add the participant to your site:

https://a115039.socialsolutionsportal.com/apricot-intake/137b11e4-a493-4fba-99f6-8397fc64ef2c

Duplicate Participant Record Request

*Required

If you attempt to add a participant to Apricot and you receive an error message that there is a duplicate record, it likely means that the individual is already receiving services from another DVP provider. If this is the case, please fill out this form and DVP staff will add them to your site.

Participant Name*

FIRST*

MIDDLE

LAST*

Participant Date of Birth*

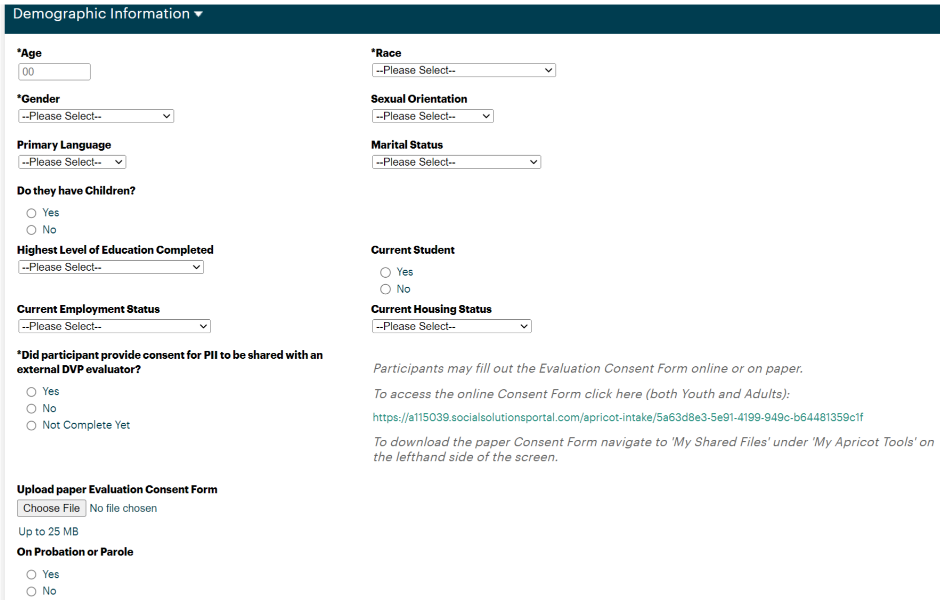
mm/dd/yyyy

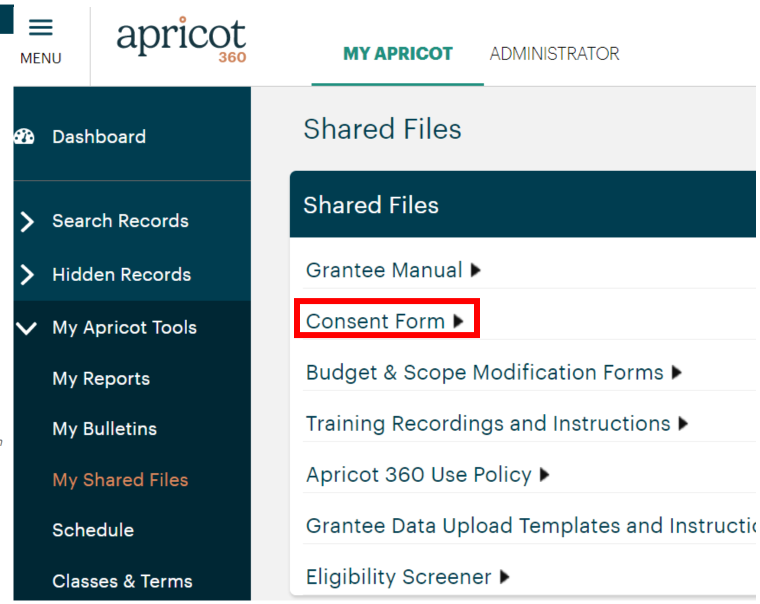
Program*

-- Select --

Consent Form

There is a link to the online version of the consent form on this page (https://a115039.socialsolutionsportal.com/apricot-intake/5a63d8e3-5e91-4199-949c-b64481359c1f), or you can use the paper consent form, which can be found by navigating on the lefthand side to 'My Apricot Tools' and 'My Shared Files', and then 'Consent Forms'.





To view a participant that is already entered, click on that participant and it will take you to their participant folder.

Please note that if a participant is in multiple programs including yours, you will see the other DVP programs they are being served by, but you will not see any details of services provided at other agencies (for example, Abode CANNOT see TMC's Service Notes nor can TMC see Abode's Service Notes for participant 10428).

Record ID	Creation Date	Assigned Programs
10428	01/18/2023 1:19 PM CST	- Abode - Adult Life Coaching (Housing Focused) - TMC - Adult Life Coaching
10749	01/18/2023 1:33 PM CST	- CEO - Adult Employment and Education Support - TMC - Adult Life Coaching
10775	01/18/2023 1:34 PM CST	- CURYJ - Adult Life Coaching - CURYJ - Neighborhood & Community Teams - TMC - Adult Life Coaching
11239	01/18/2023 2:41 PM CST	- OPIC - Adult Employment and Education Support - TMC - Adult Life Coaching
11395	01/18/2023 2:45 PM CST	- Abode - Adult Life Coaching (Housing Focused) - TMC - Youth Life Coaching - TMC - Adult Life Coaching

In the participant folder, you will see various forms:

- Program Enrollment
- Service Notes
- Referral
- Intake and Needs Assessment
- Life Map Goals and Activities
- Housing Placement
- Relocation
- Work Experience/Job Placement

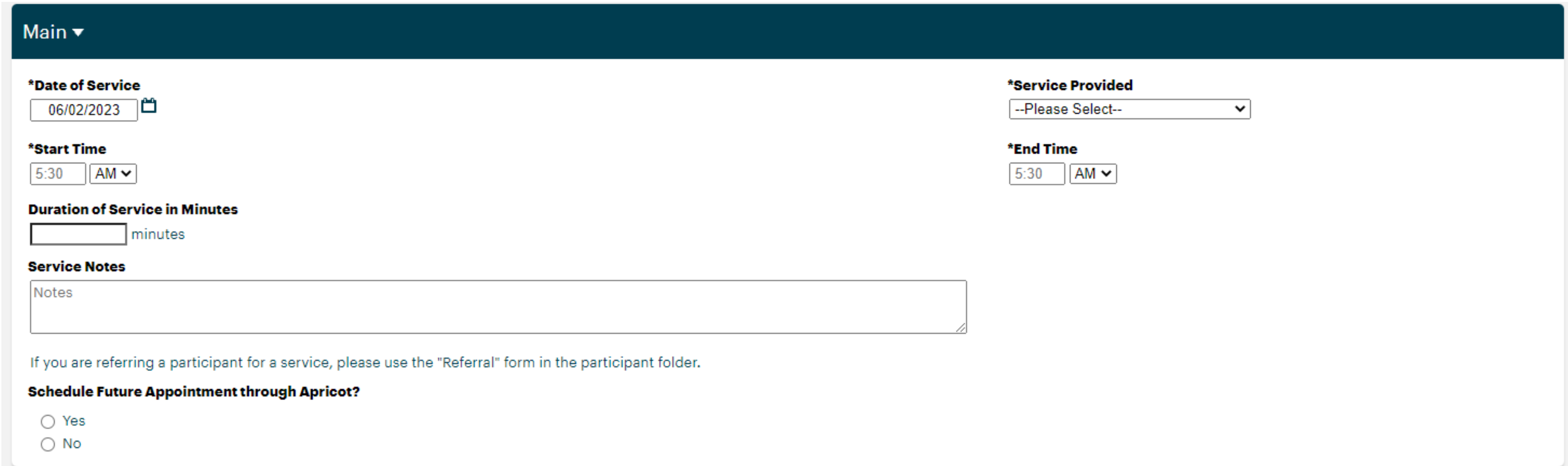
Program Enrollment

When you start working with a participant, please enter a Program Enrollment form to log their start date, referral source, and eligibility screener questions (for Life Coaching and Employment) by clicking the blue and white plus button on the righthand side under Program Enrollment under the Participant folder.

When and if a participant exits the program, please return to this form to log their exit date and exit reason.

Service Notes

Any time you meet with a participant, log a Service Note to log the date, time, type of service, and any notes by clicking the blue and white plus button on the righthand side under Service Notes under the Participant folder.

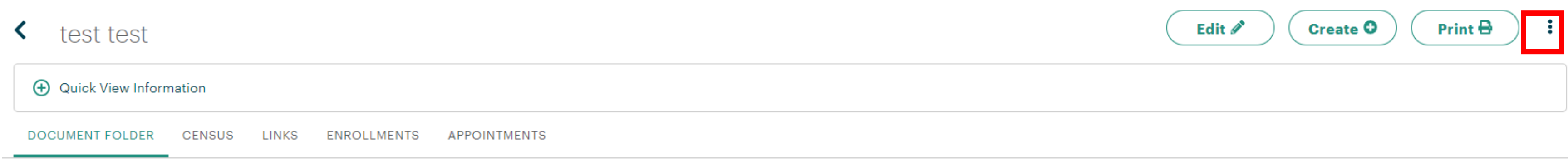


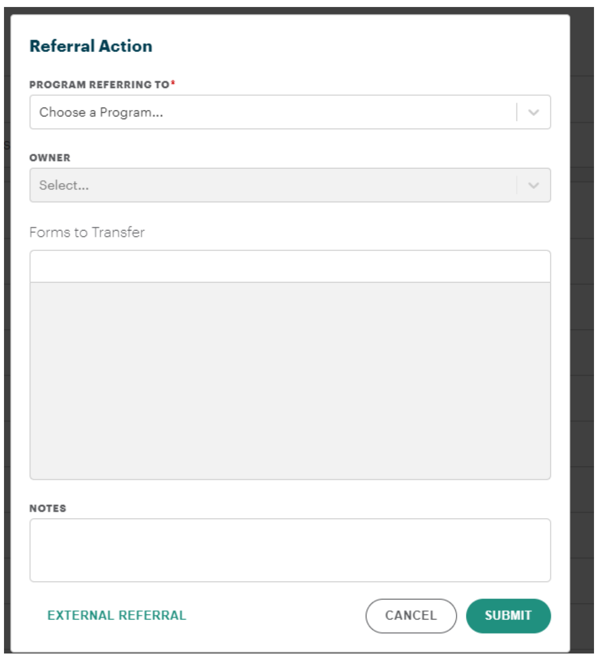
Referral

Within DVP Network

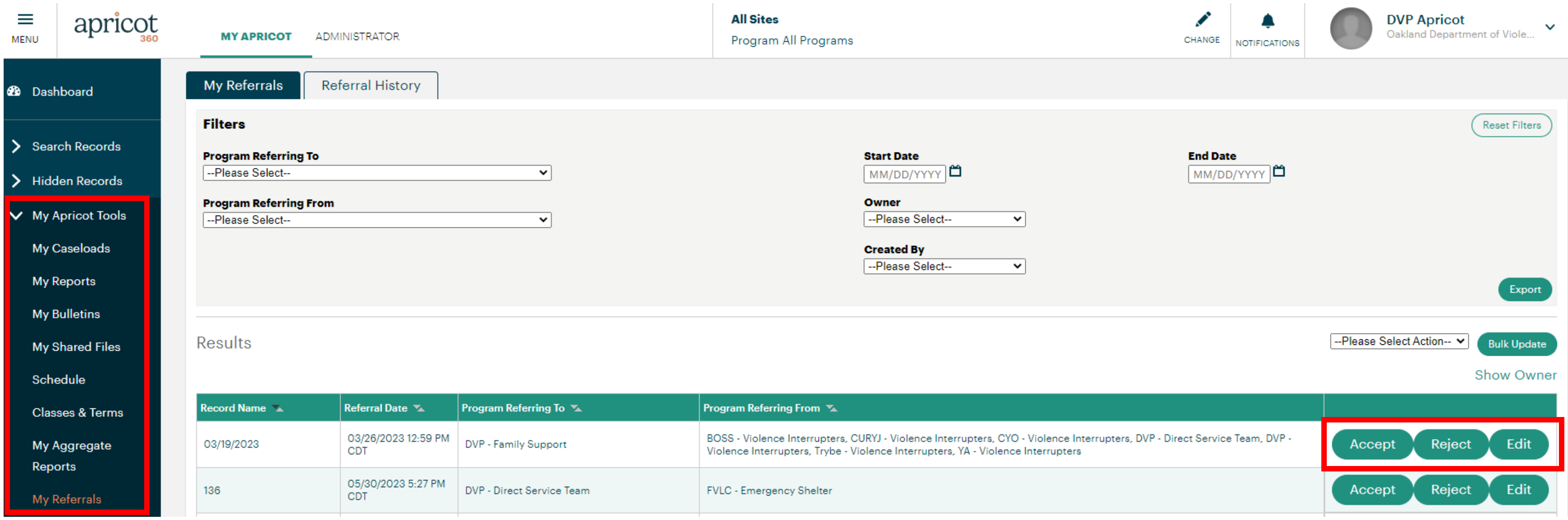
To do a referral within the DVP network, you click on the participant folder and the ellipses (three dots) in the top right corner and click ‘Create Referral’. You will then select the program you would like to refer them to and skip the section on forms to transfer (unless the participant has given you permission to send certain information to the agency you are referring to).

If you would like to add any notes to the message, it will be important to not put participant names or any other personally-identifiable information in the notes section of the referral. If you do this, a point person at the agency will then receive an auto-generated email from Apricot saying that they have received a referral. They can go log-in to the system and view referrals to their program on the lefthand side under ‘My Referrals’ and ‘accept’ or ‘reject’ the referral.



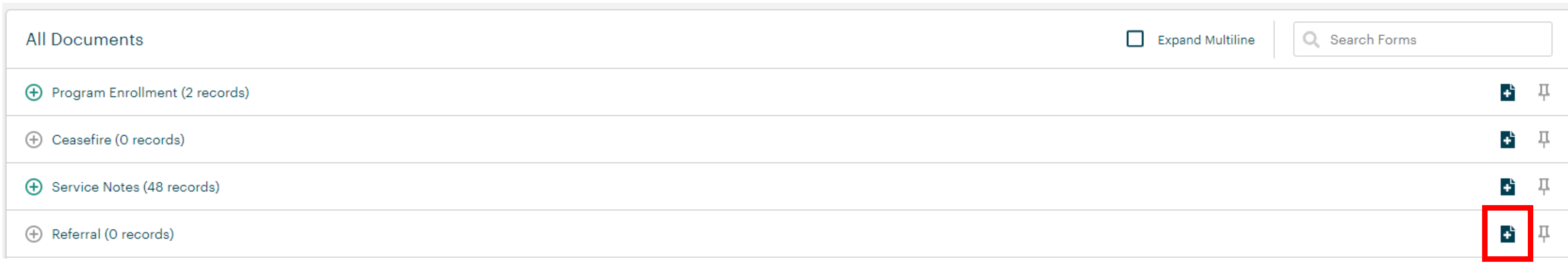


Referrals for your program can be found by navigating to ‘My Apricot Tools’ on the lefthand side, clicking on ‘My Referrals’, and then accepting or rejecting referrals on the righthand side.



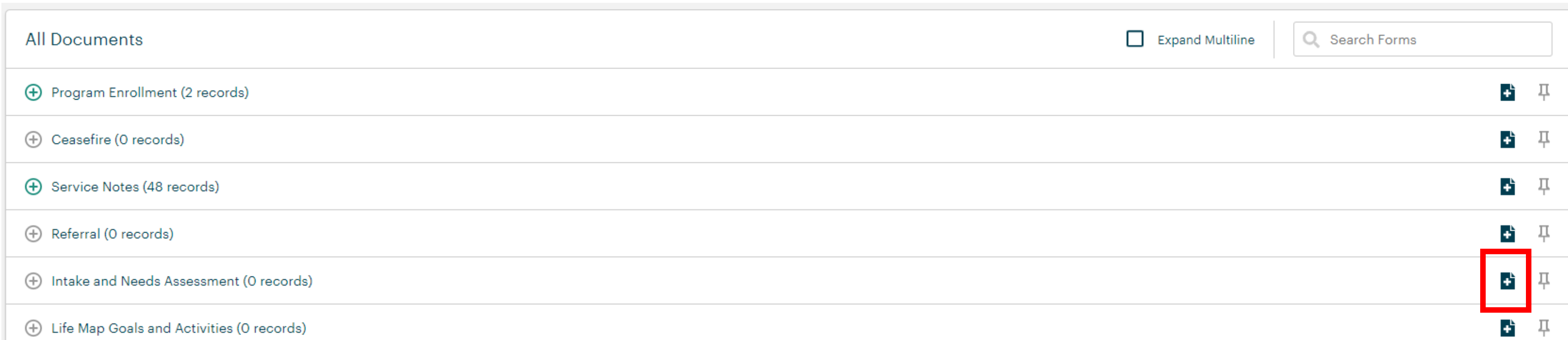
Outside of DVP Network

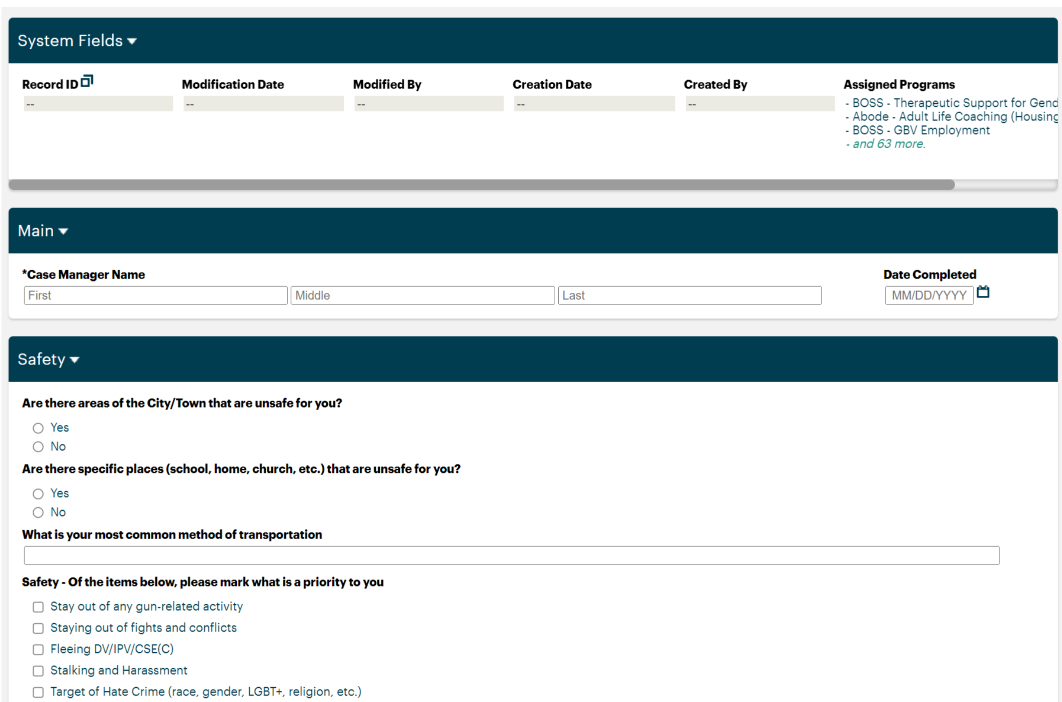
To log a referral to an agency outside of the DVP network, click on the blue and white plus button on the righthand side of the participant folder and log the date, type of referral, and agency they are referred to.



Intake and Needs Assessment

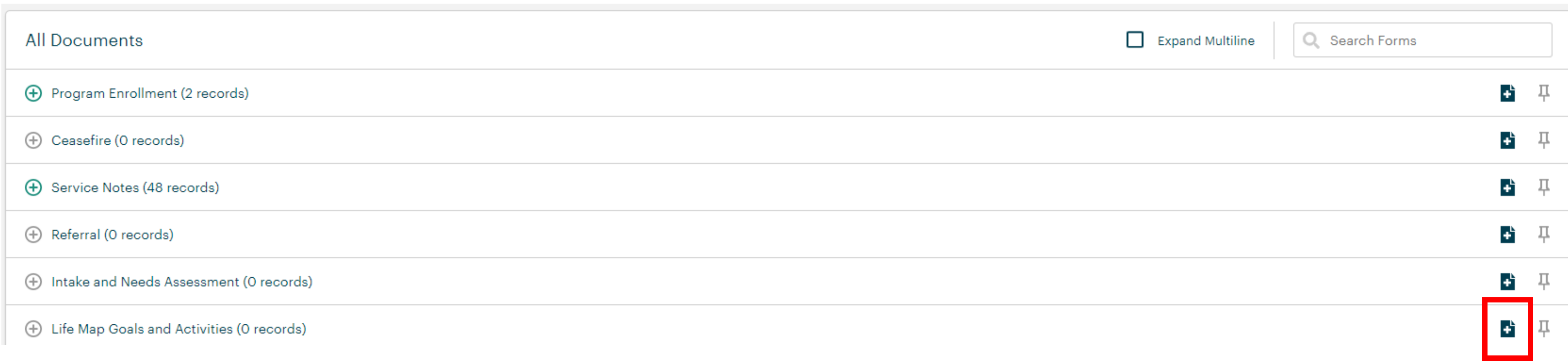
To enter an Intake and Needs Assessment for Life Coaching participants, click the blue and white plus button on the righthand side of the Participant folder.



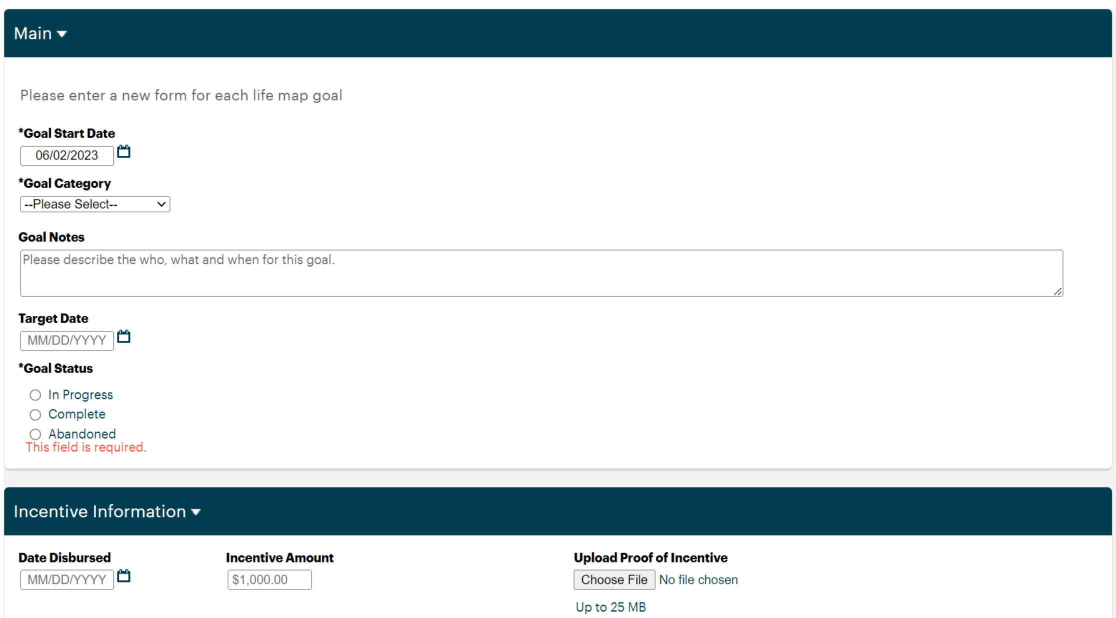


Life Map Goals and Activities

To enter or update information on a goal that a Life Coaching participant sets, click the blue and white plus button on the righthand side of the Participant folder under ‘Life Map Goals and Activities’. Please enter a new form for each life map goal.

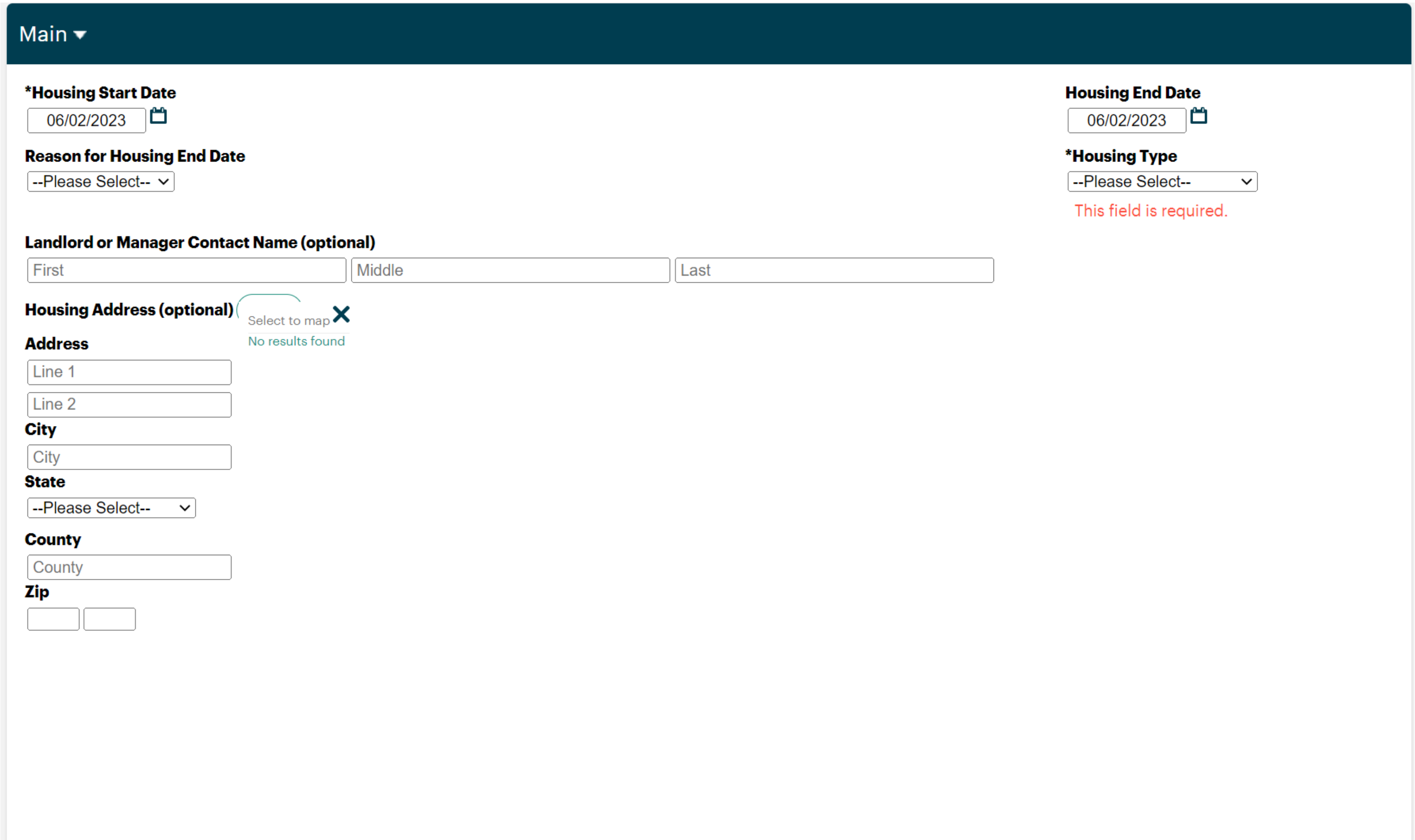


When the goal is completed and an incentive is given out, go back to the goal to update it with the incentive amount.



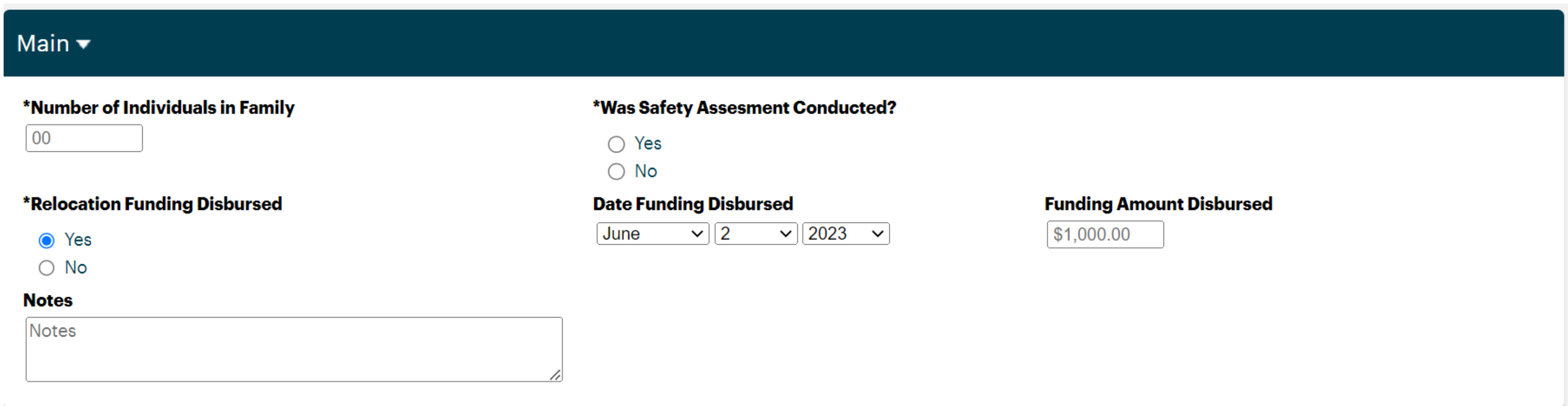
Housing Placement

To enter or update information on a Housing Placement, click the blue and white plus button on the righthand side under ‘Housing Placement’ in the participant folder. When and if a participant exits housing, return to this form to include the exit date and reason.



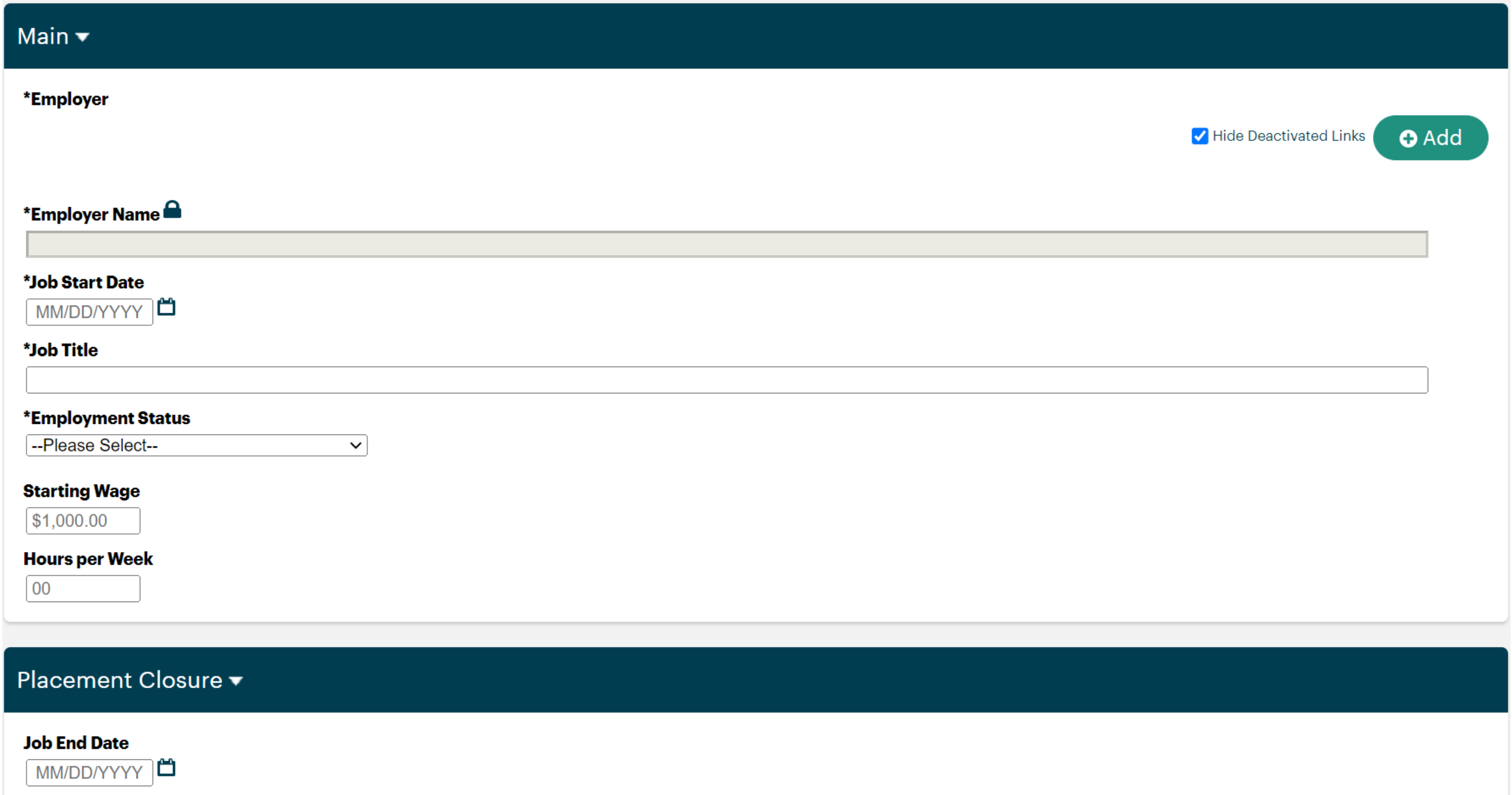
Relocation

To enter or update information on a Relocation, click the blue and white plus button on the righthand side under ‘Relocation’ in the participant folder, including date, if funding was disbursed, and how much.

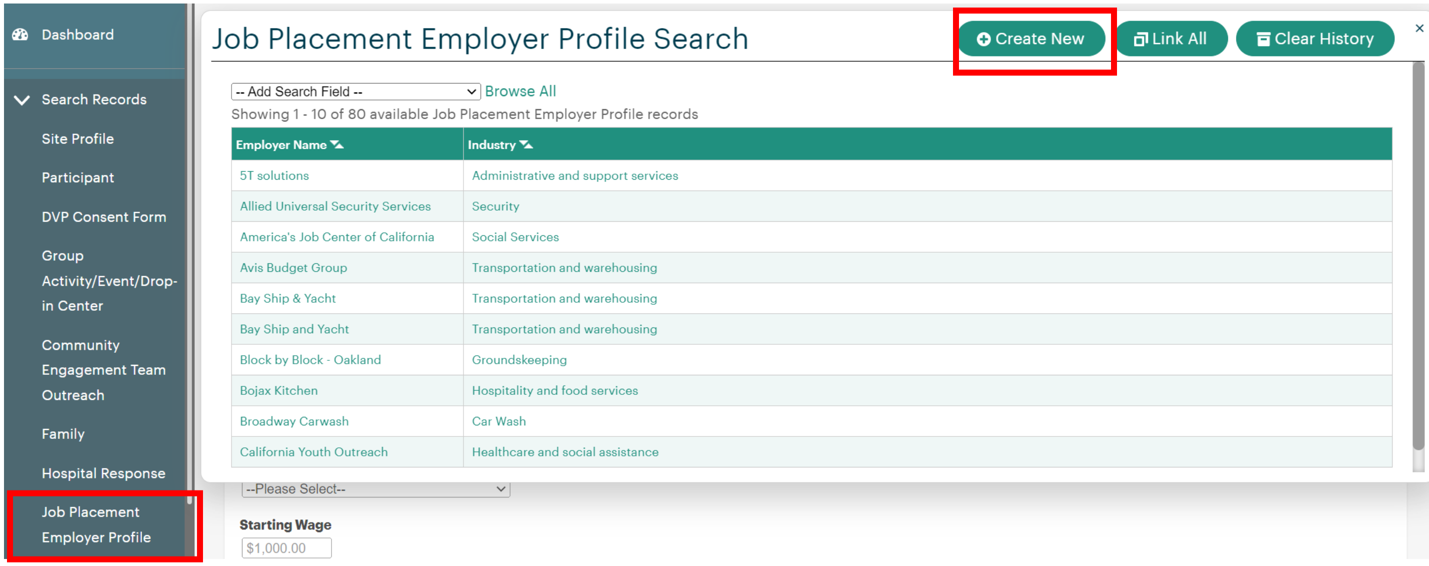


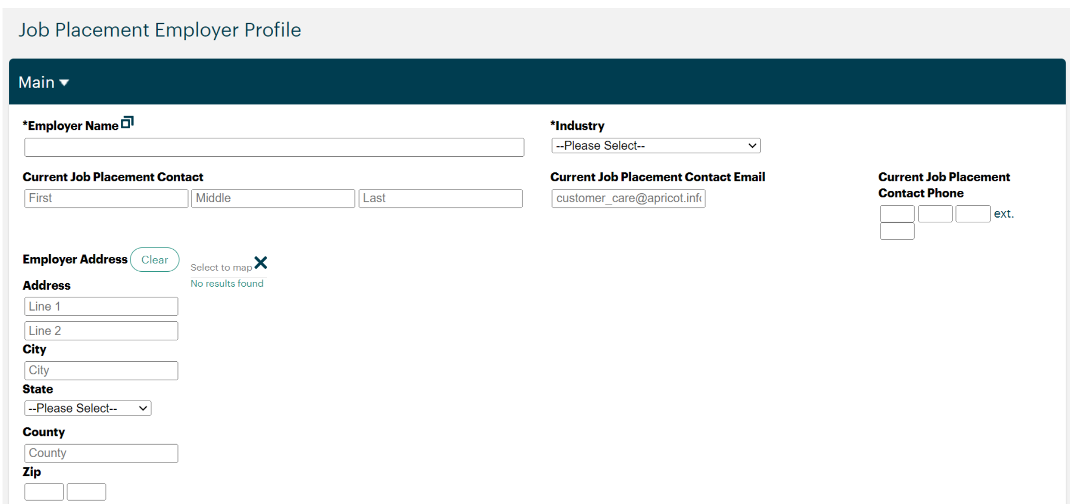
Work Experience/Job Placement and Job Placement Employer Profile

When a participant starts a new job or work placement, click the blue and white plus button on the righthand side under 'Work Experience/Job Placement' in the participant folder. Please note that this only needs to be logged at the beginning of the job and at the end—weekly attendance does not need to be taken, only the average hours worked per week should be logged in the beginning and end.



You must link the Work Experience/Job Placement to an employer, which you can select from the list when you click the green '+Add' button, or you can create a new one by clicking the green '+Create New' button or by navigating to 'Search Records' and 'Job Placement Employer Profile' on the lefthand side and clicking '+New Job Placement Employer Profile' on the righthand side.

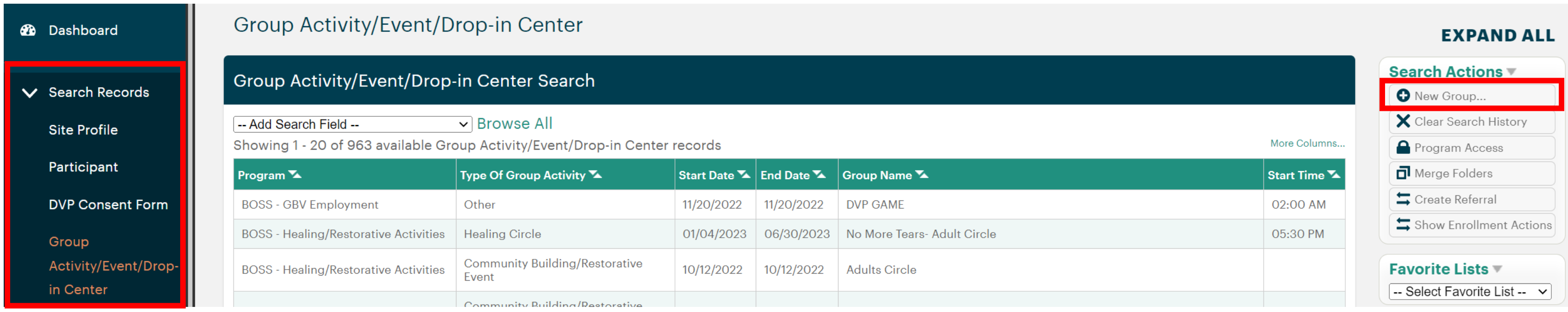




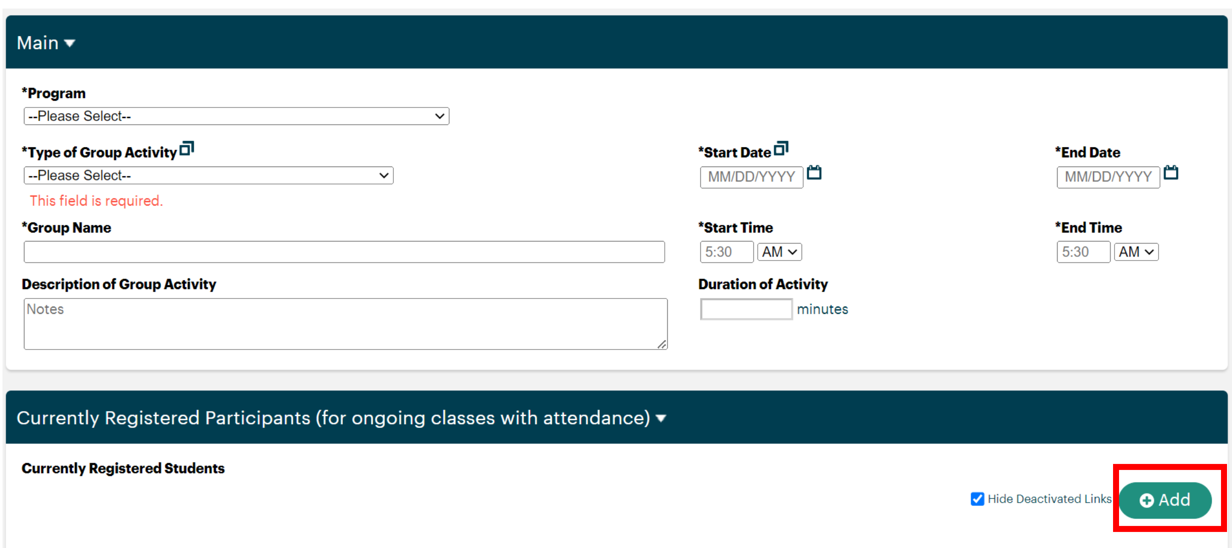
Group Activity/Event/Drop-in Center

Any time your agency holds a group activity or event, you should enter a new Group Activity/Event/Drop-in Center record. Each day at the Drop-in Center should be entered using this form as well with the estimated number of participants.

To enter a new Group Activity/Event/Drop-in Center record, navigate to 'Search Records' on the lefthand side, and click on 'Group Activity/Event/Drop-in Center' and click '+ New' on the righthand side.

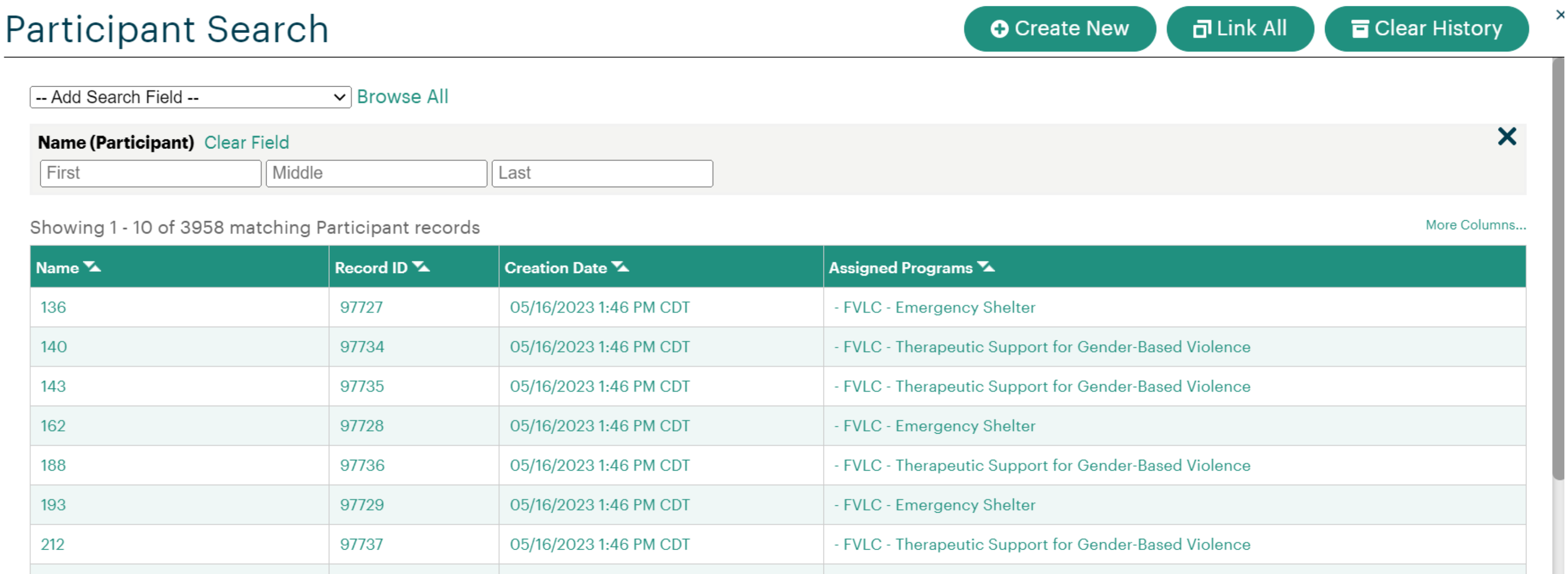


You will then enter details on the group, such as type, date(s), time, and other questions such as number of people in attendance based on the type of group it is.

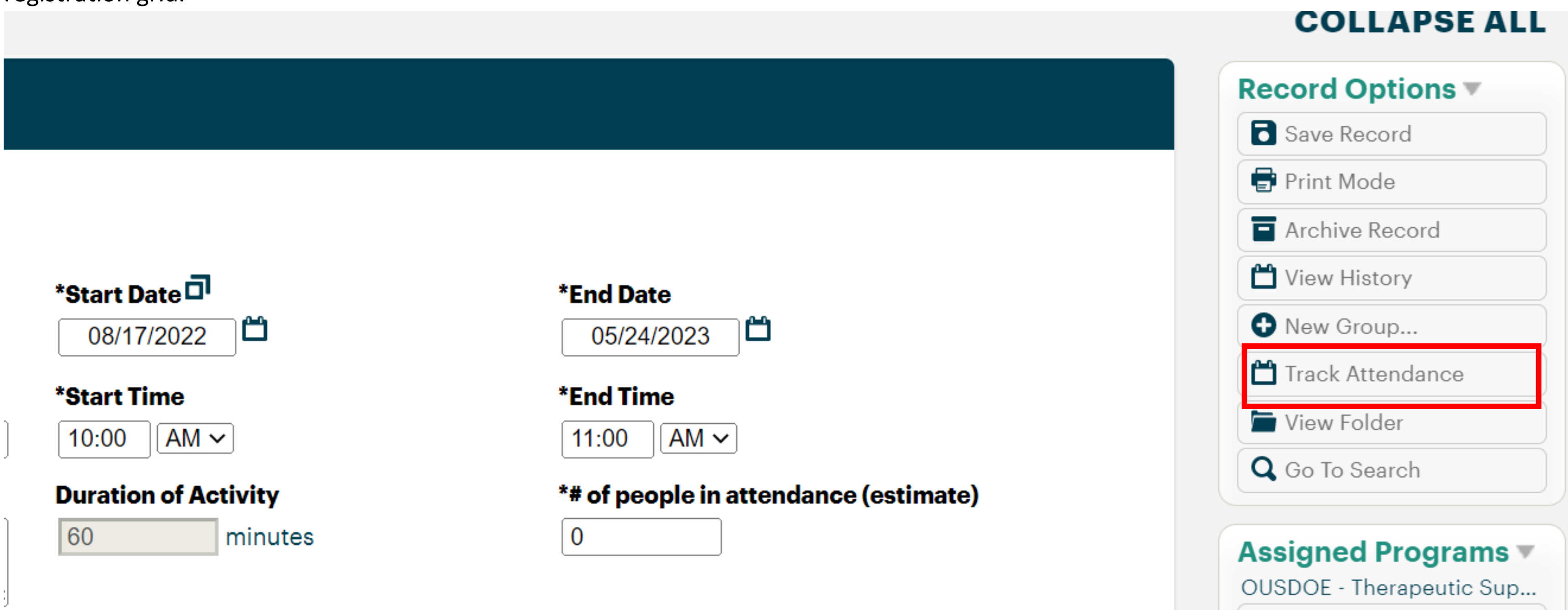


Registering Participants in Groups & Tracking Group Attendance

If the group is an ongoing class with the same participants each week, you will ‘register students’ and track their attendance. To do so, click the green ‘+Add’ button under the ‘Currently Registered Participants’ section and select the participants you would like to add. You can select them from the list or search by their name by clicking ‘Name’ under the ‘Add Search Field’ dropdown.



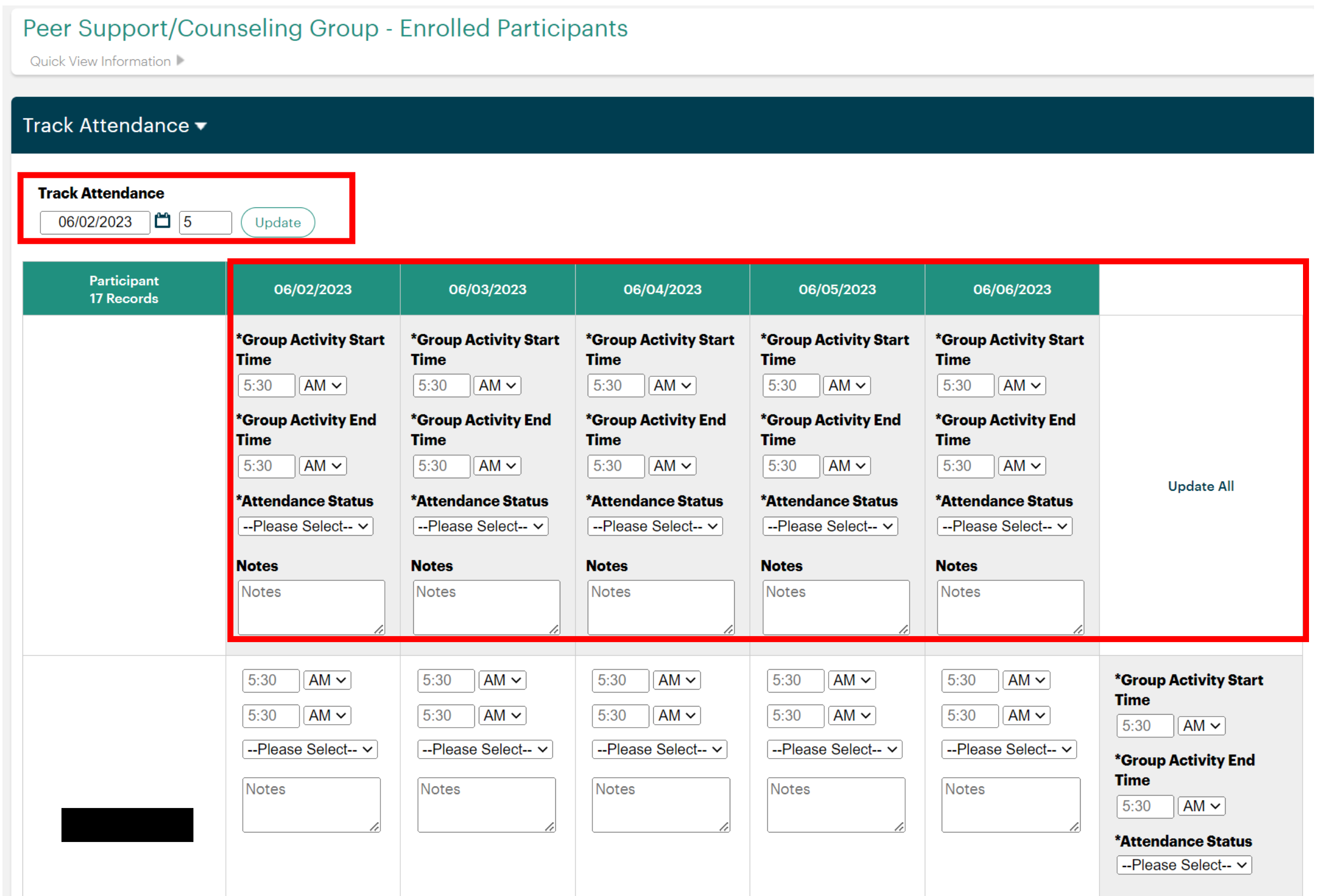
Once students are registered in the group activity/class, you will click 'Track Attendance' on the righthand side and it will bring you to the registration grid.



To fill out the registration grid, you can select the start date of the group and the number of days you would like to track attendance for at the top.

The first row of the registration grid is the template for all attendees, so you can fill that in with the start and end time for each day of attendance, and then mark the default attendance (present, absent, etc.) for all students. For example, you can mark ‘present’ for all using the first row and then go change absent students’ attendance to ‘absent’, or you can mark ‘absent’ for all using the first row and go change present students’ attendance to ‘present’.

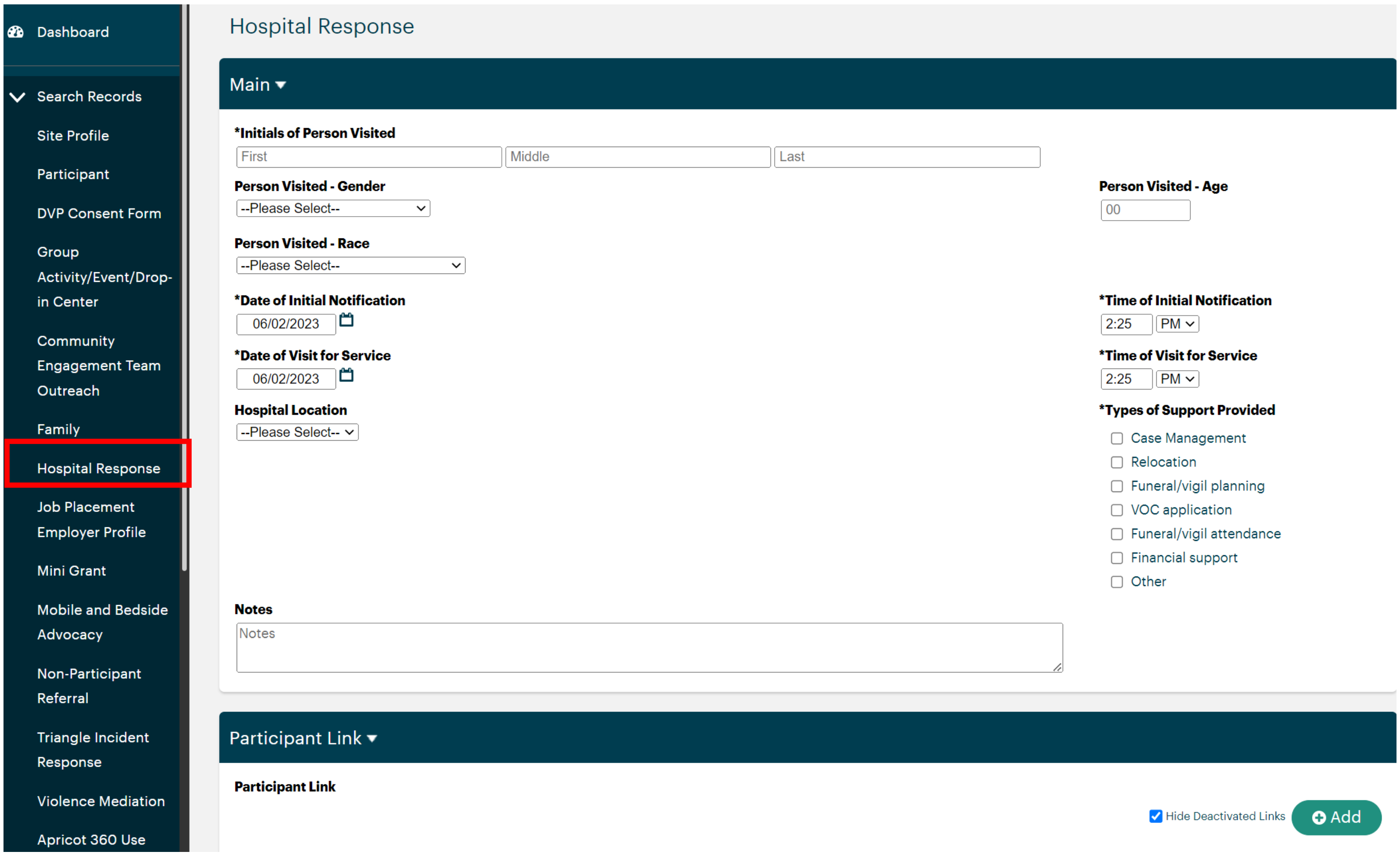
Please note—it is highly recommended that you record attendance weekly for ease of data entry.



Hospital Response

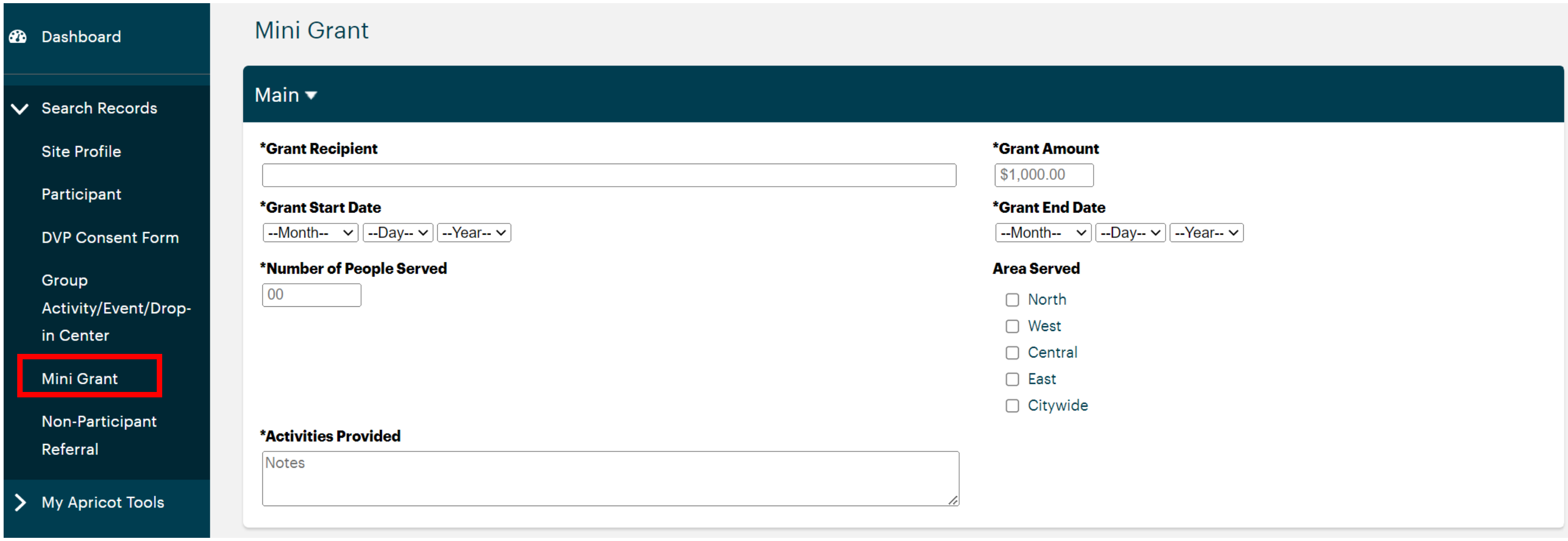
To enter a hospital response record, navigate to 'Search Records' on the righthand side, click 'Hospital Response', and click the '+New Hospital Response' on the righthand side.

To link this form to a participant that you are serving in an ongoing way, click the green '+Add' button at the bottom and select the participant from the list.



Mini-Grant

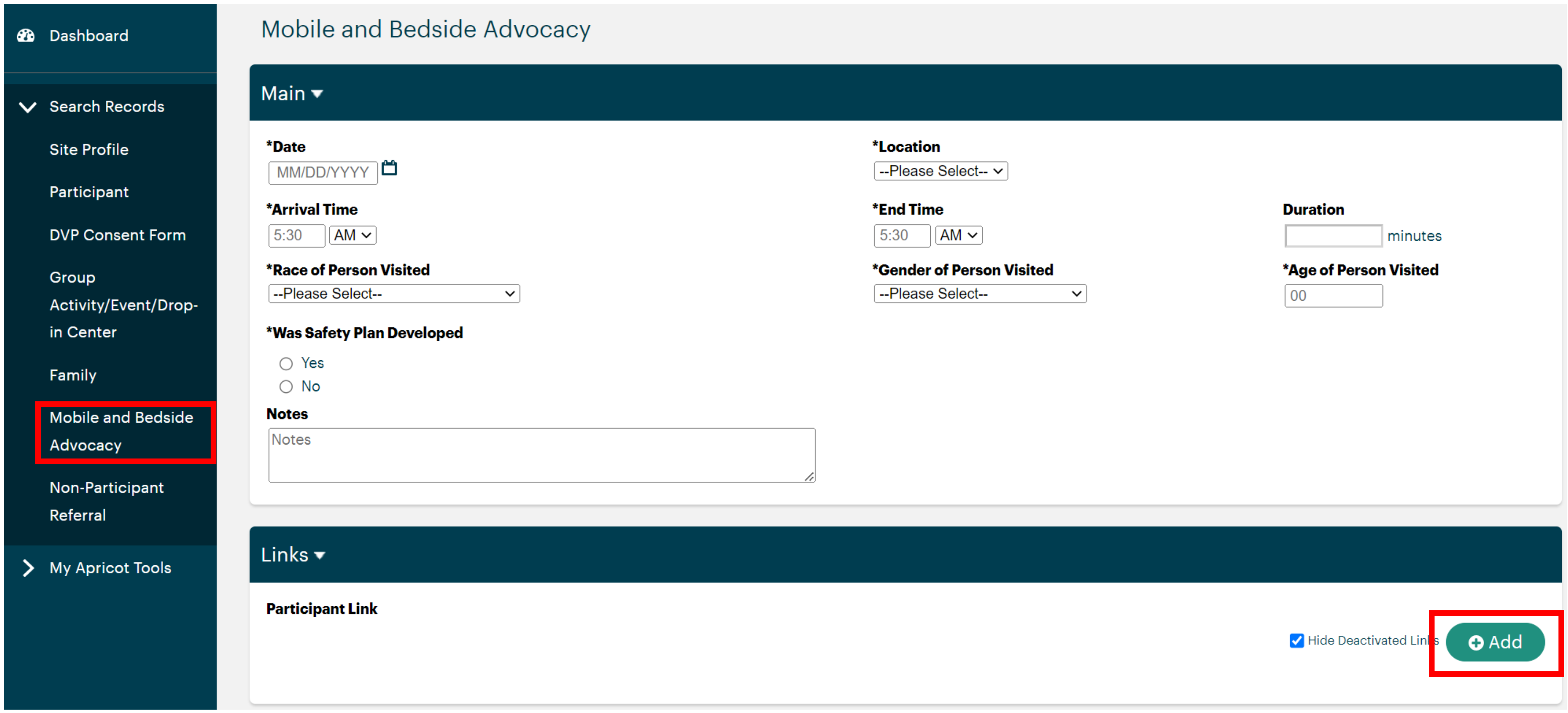
To enter a Mini-Grant that was awarded, navigate to 'Search Records' on the righthand side, click 'Mini-Grant', and click the '+Mini-Grant' on the righthand side.



Mobile and Bedside Advocacy

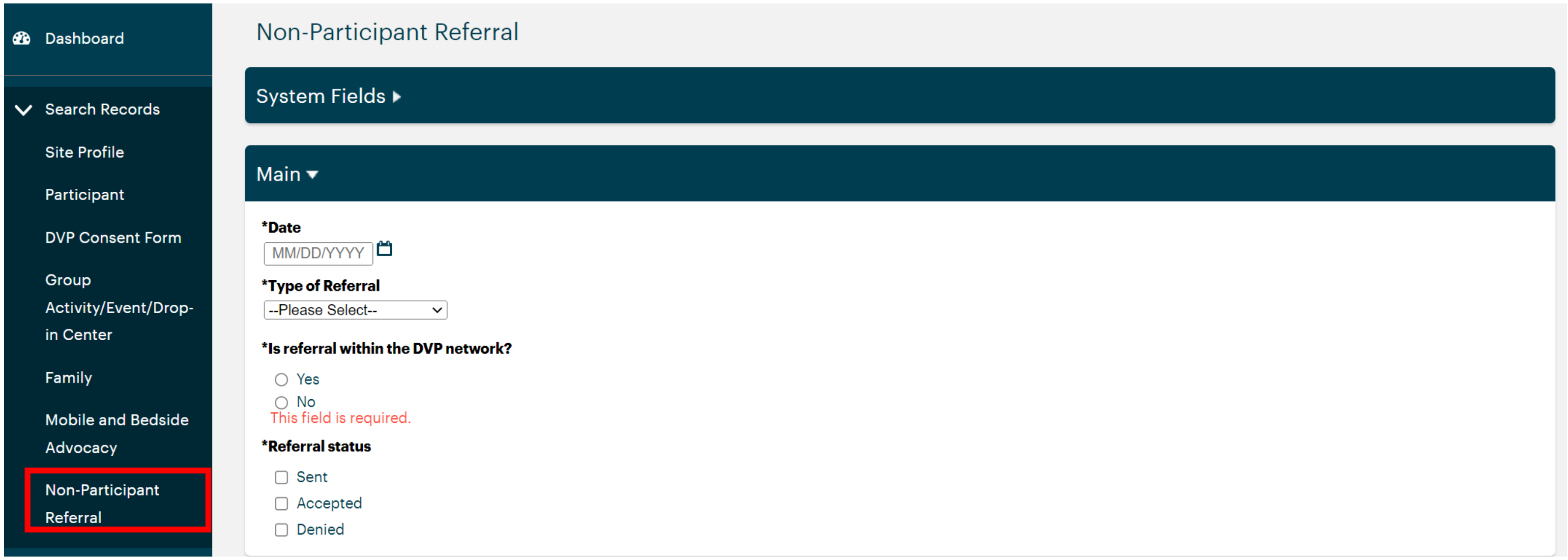
To enter a Mobile and Bedside Advocacy form, navigate to ‘Search Records’ on the righthand side, click ‘Mobile and Bedside Advocacy’, and click the ‘+Mobile and Bedside Advocacy’ on the righthand side.

To link this form to a participant that you are serving in an ongoing way, click the green ‘+Add’ button at the bottom and select the participant from the list.



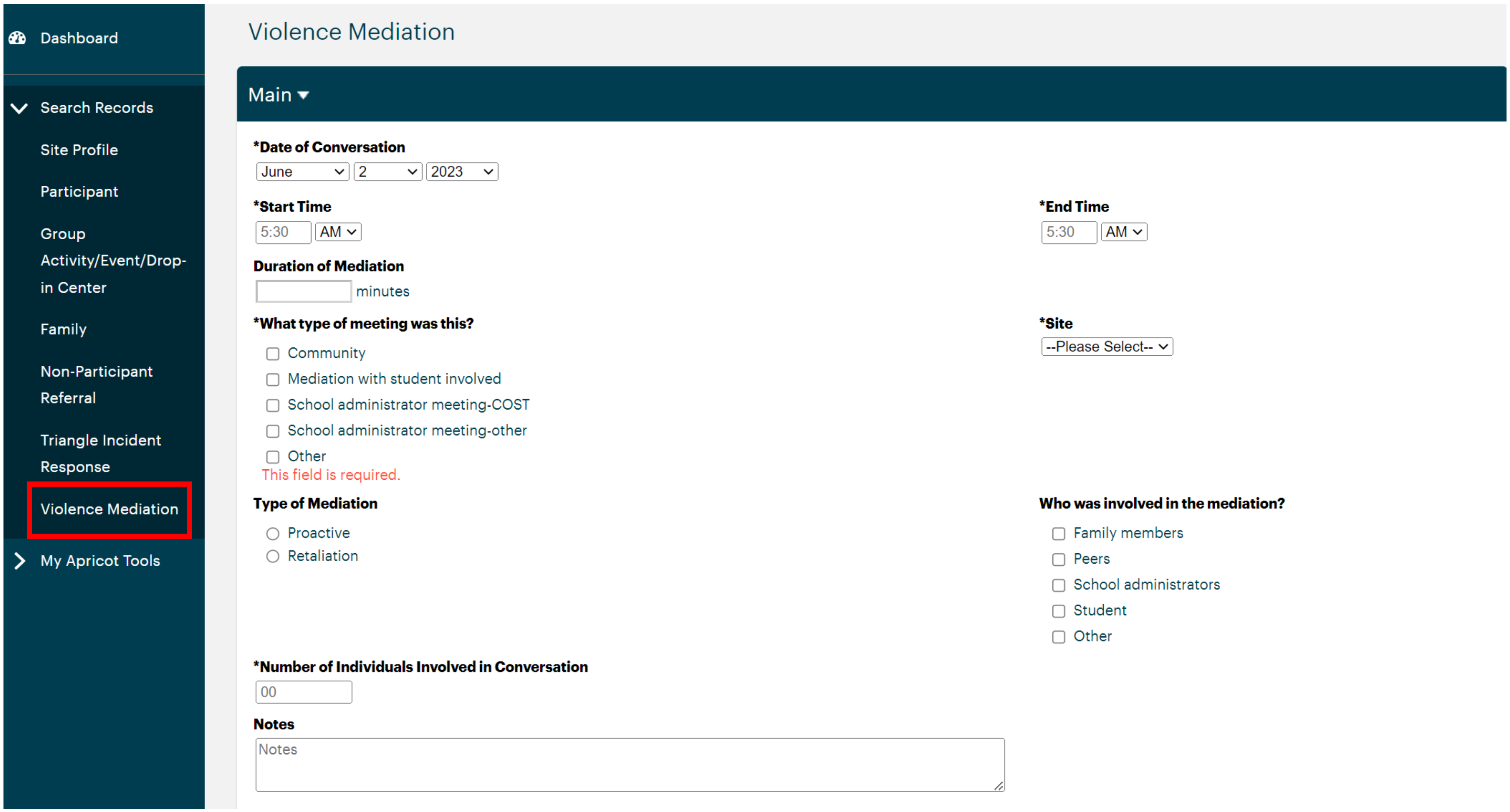
Non-Participant Referral

For referrals that are done during outreach or for individuals who are not ongoing participants and do not have a Participant record, you will enter a Non-Participant Referral form. To do this, navigate to 'Search Records' on the righthand side, click 'Non-Participant Referral', and click the '+Non-Participant Referral' on the righthand side.



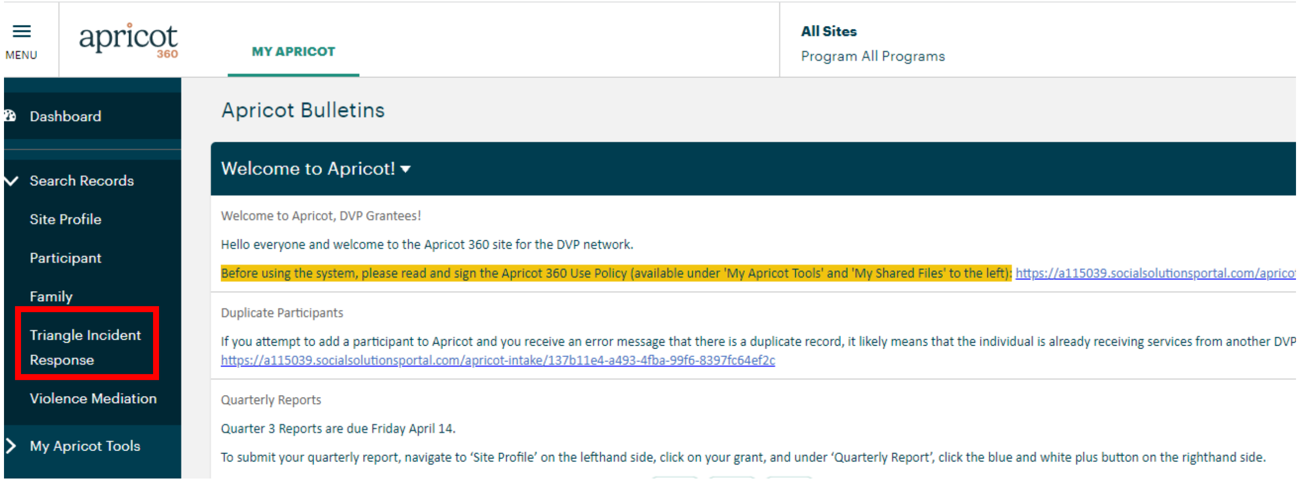
Violence Mediation

To enter a Violence Mediation form, navigate to 'Search Records' on the righthand side, click 'Violence Mediation', and click the '+Violence Mediation' on the righthand side.



Triangle Incident Response

To locate Triangle Incident Response records, navigate to “Triangle Incident Response” on the left side of the screen under ‘Search Records’. You will first find the incident you responded to and then you will log your response.



Click the ‘Date of Incident’ column **twice** to sort by most recent date and find the incident you responded to and click on it. You can also search by the address by clicking ‘Add Search Field’ and selecting address and typing that in.

MY APRICOT

All Sites
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NOTIFICATIONS

Triangle Incident Response

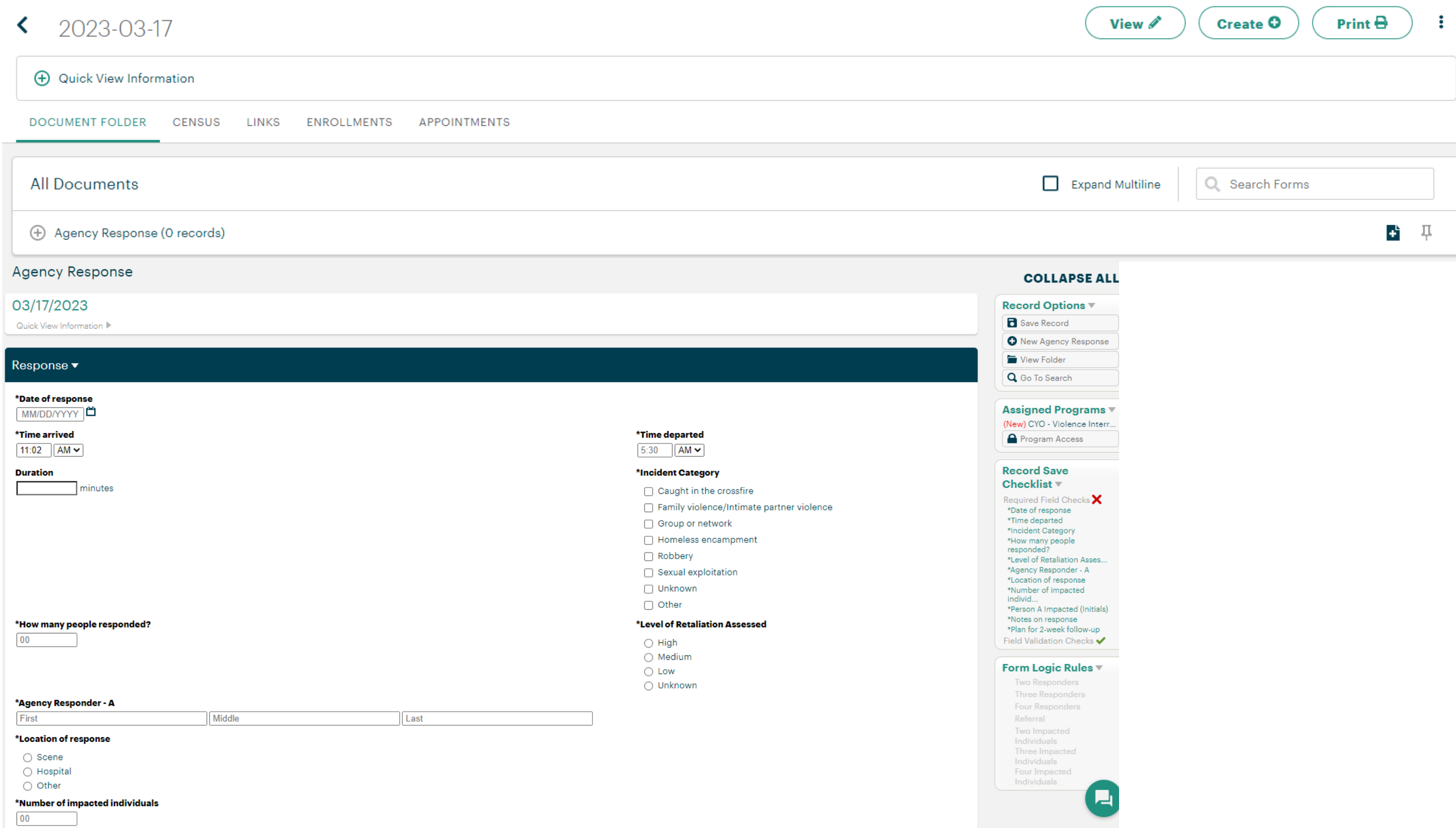
Triangle Incident Response Search

-- Add Search Field -- Browse All

Showing 1 - 20 of 456 available Triangle Incident Response records

Date Of Incident (Click Twi...	Time Of Incident	Address Of Incident (Block ...	Was This A Homicide
01/25/2022	11:39 PM	8600 A Street	Yes
03/08/2022	04:39 PM	3500 West st.	Yes
03/08/2022	03:00 PM	9000 Bancroft	No
03/09/2022	09:51 PM	2400 International	Yes
03/09/2022	09:23 AM		No
03/09/2022	11:42 PM		No
03/12/2022	11:19 PM	3500 MacArthur blvd	No
03/12/2022	01:07 AM	1825 Fruitvale	No
03/12/2022	01:07 AM	1825 Fruitvale ave	No
03/15/2022	01:09 AM	3337 E. 17TH ST.	Yes
03/18/2022	06:36 PM		No
03/19/2022	03:26 AM		No
03/19/2022	03:09 AM		No
03/19/2022	08:21 PM	10100 International	Yes
03/19/2022	08:07 PM	1800 International blvd	Yes
03/19/2022	06:29 AM	1011 E. 24TH ST.	No
03/19/2022	02:18 AM		Yes
03/24/2022	04:12 PM	2036 82nd ave	No
03/26/2022	07:21 PM	800 77thave	No

Once you find the incident, it will take you to the incident folder. You will then click on blue and white plus button on the righthand side to add your response.



To link this form to a participant that you are serving in an ongoing way, click the green '+Add' button at the bottom and select the participant from the list.

You can also return to your "Agency response" form and update it with new information as it becomes available (referrals, two-week plan, etc.).