Apricot Data Entry: Individual Services

January 2025

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Introduction

Agencies that are funded by the City of Oakland’s Department of Violence Prevention (DVP) to deliver **one-on-one services to individuals** are required to enter service data in the DVP’s data management system, Apricot 360.

A **participant record** and **program enrollment form** should be completed for every participant served. Additional forms may be completed based on the type of services delivered.

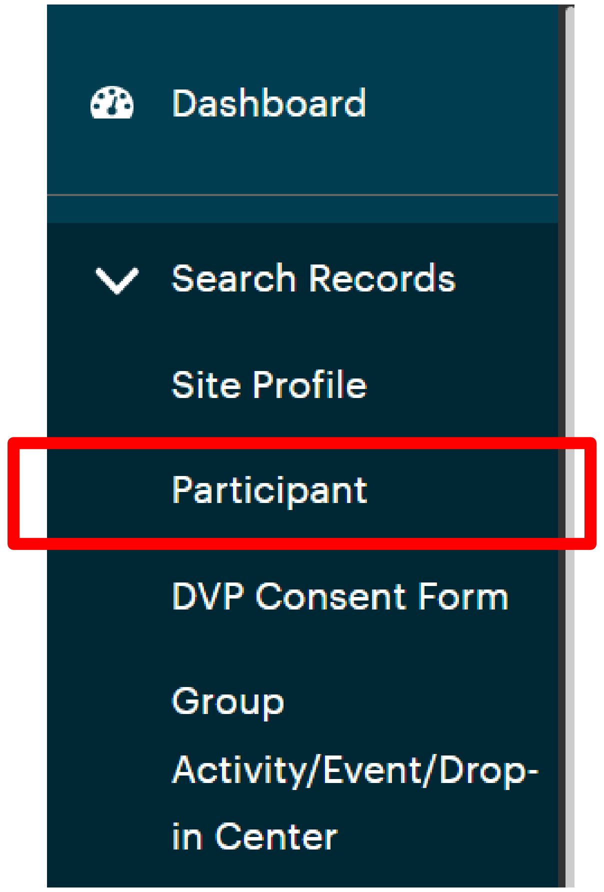
This guide is intended to support grantees in completing forms in Apricot 360 related to individual participant services.

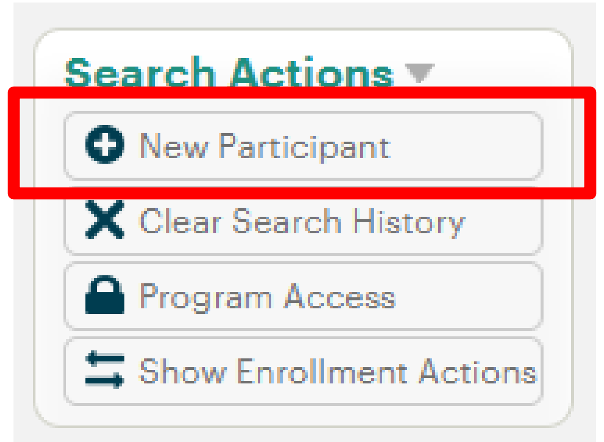
Participant Records

Creating a Participant Record

- **Step 1:** Click on the “Participant” link on the left side of the screen under “Search Records.”

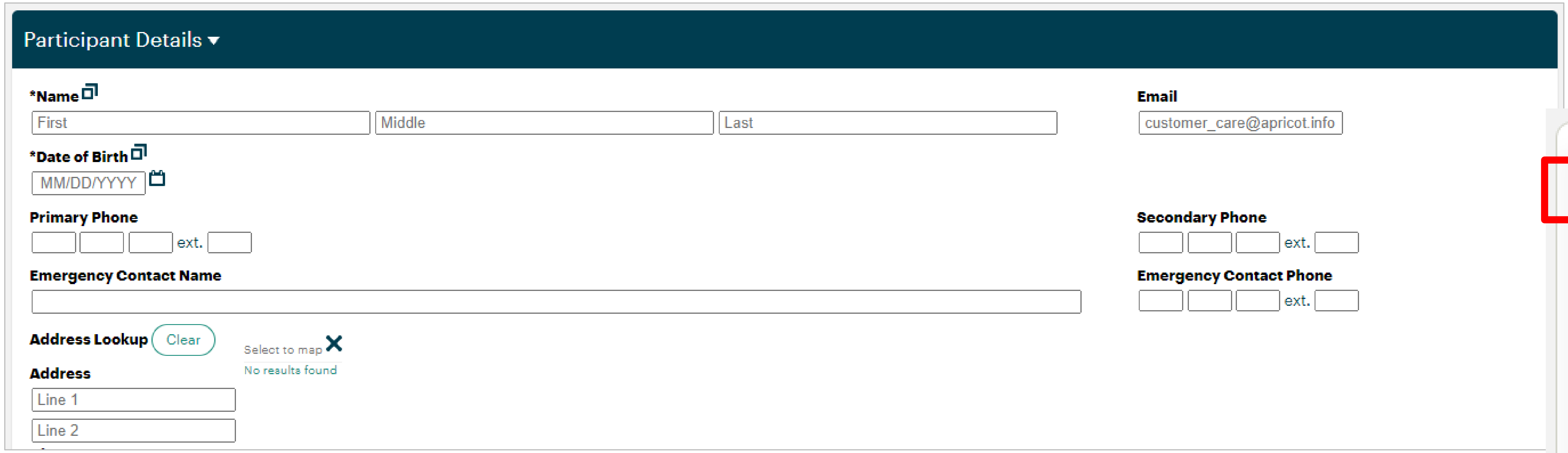
- **Step 2:** Click the “+ New Participant” button on the right side of the screen.

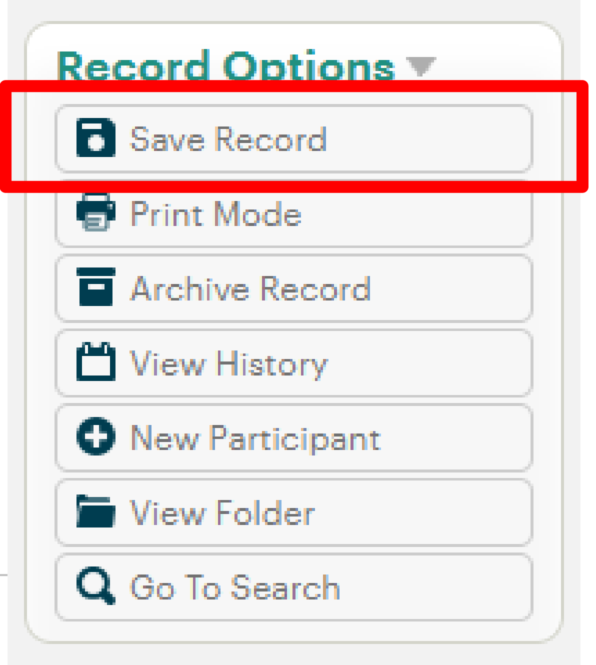




Creating a Participant Record

- **Step 3:** Complete all fields under “Participant Details” and “Demographic Information.”





- **Step 4:** Click “Save Record” on the right side of the screen.

Duplicate Records

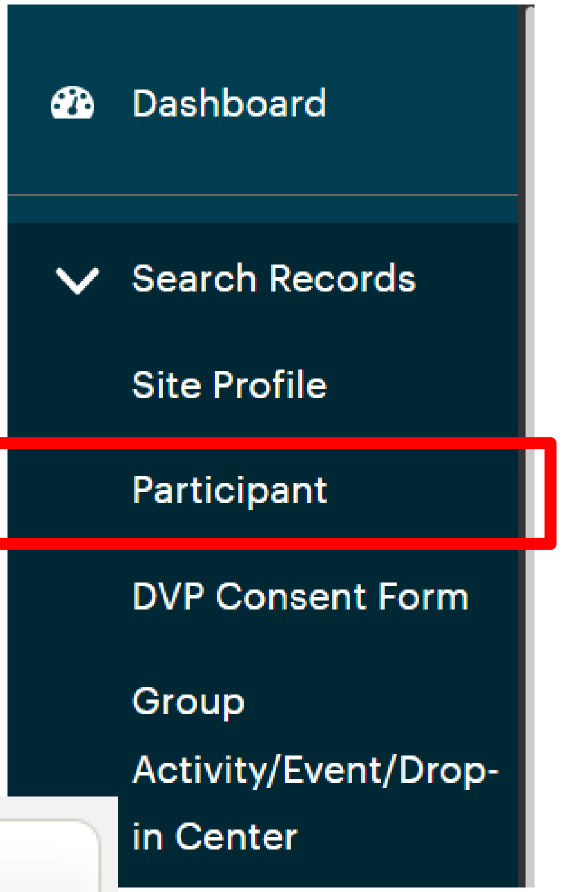
If a person is already in the system, a duplicate record message will appear.

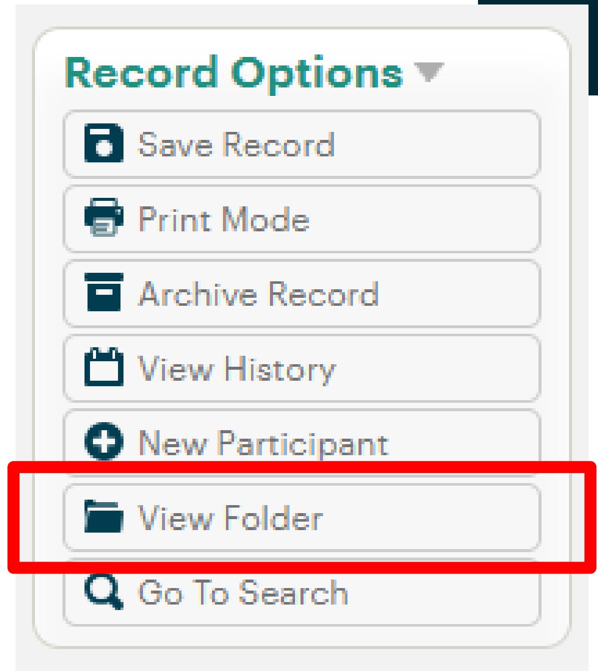
Complete this form to have the person added to your site.

Accessing a Participant's Folder

- **Step 1:** Click on the "Participant" link on the left side of the screen under "Search Records."

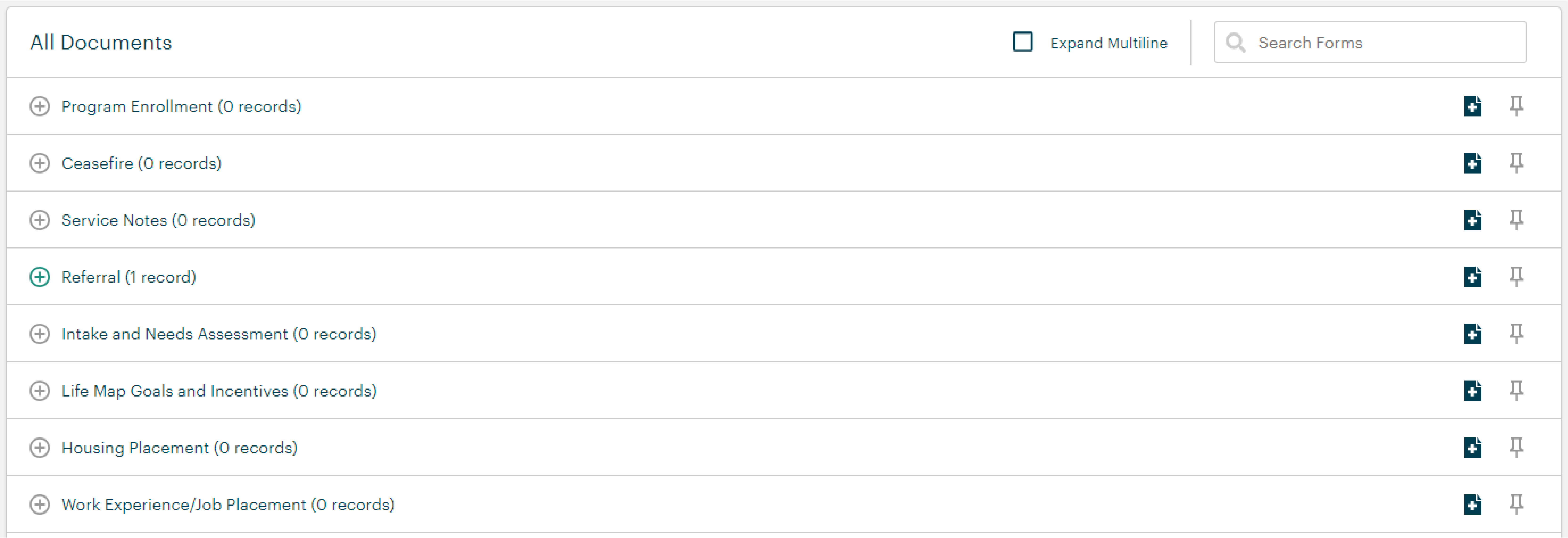
- **Step 2:** Find the participant and click on their name. Then, select "View Folder" on the right side of the screen.





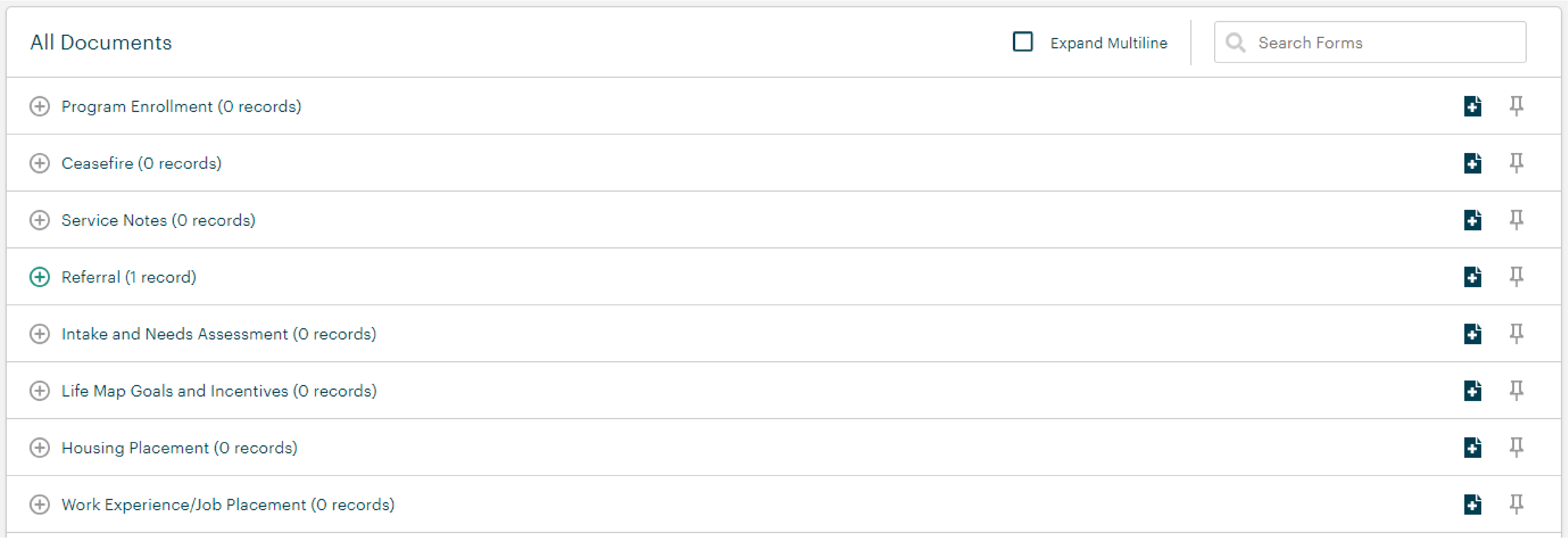
Accessing a Participant’s Folder

This the participant’s folder, where all service delivery records are stored.



Accessing a Participant’s Folder

To add a new record in any folder, simply click the “+” icon in the correct row.

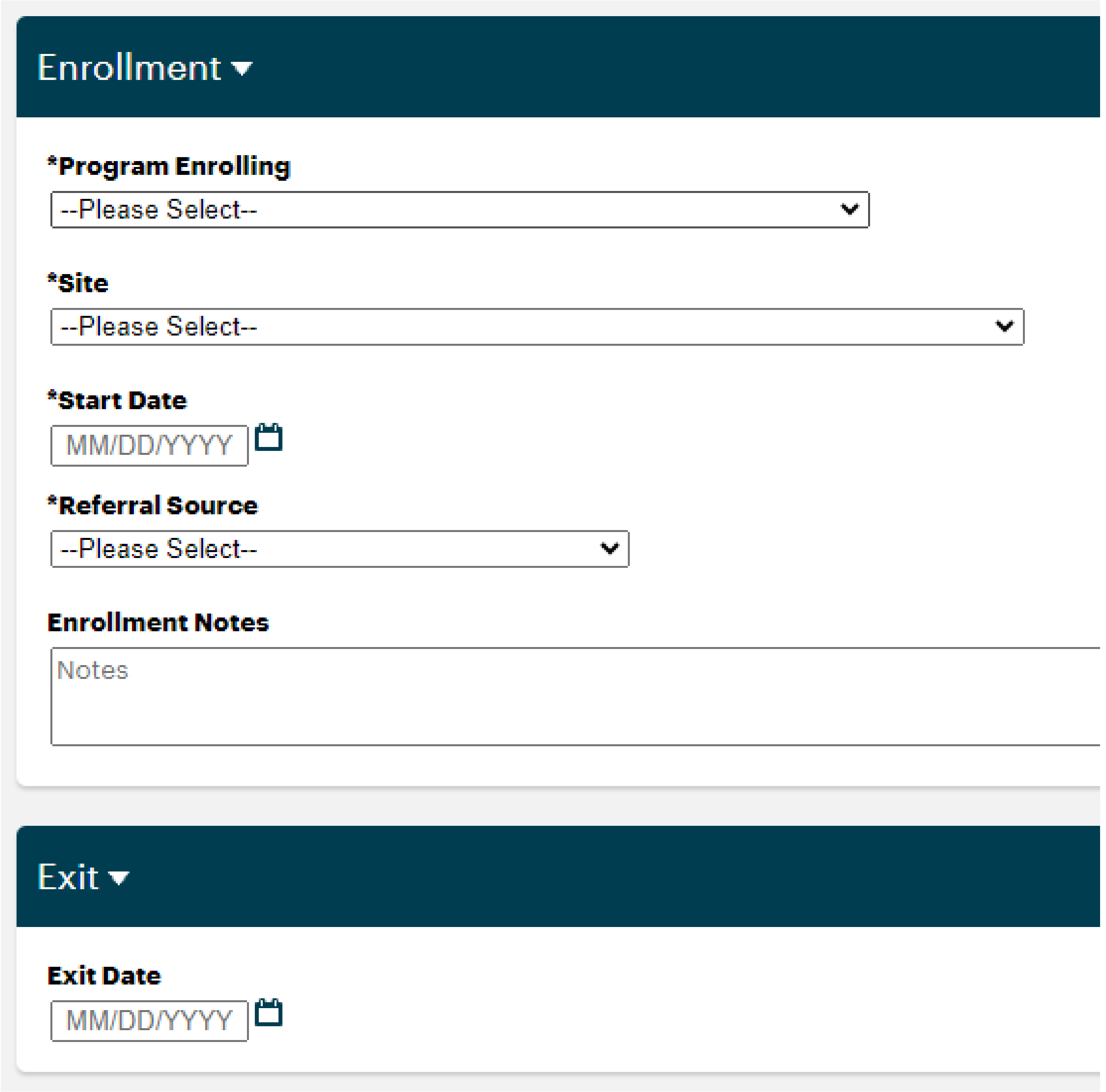


Forms in a Participant’s Folder

Program Enrollment Form

Complete a program enrollment form when an individual is **beginning** or **ending** services.

It is extremely important to return to this form to enter an exit date and reason when a participant ends services, for whatever reason.


Enrollment

*Program Enrolling

--Please Select--

*Site

--Please Select--

*Start Date

MM/DD/YYYY

*Referral Source

--Please Select--

Enrollment Notes

Notes

Exit

Exit Date

MM/DD/YYYY

Service Notes Form

Complete a service notes form every time a life coach, case manager, or other staff member meets with a participant.

Main ▾

***Date of Service**

07/10/2024

***Contact Method**

- ○ In-person
- ○ Phone
- ○ Text
- ○ No contact

***Start Time**

5:30 AM

Duration of Service in Minutes

[ ] minutes

This field will auto calculate based on start and end time.

Service Notes

Notes

If you are referring a participant for a service, please use the "Referral" form in the participant folder.

Schedule Future Appointment through Apricot?

- ○ Yes
- ○ No

***Service Provided**

--Please Select--

Select “Life Coaching”

Who was the meeting with?

- ○ Participant only
- ○ Participant and family
- ○ Family member of participant only
- ○ Participant and other service provider
- ○ Other service provider only
- ○ Other

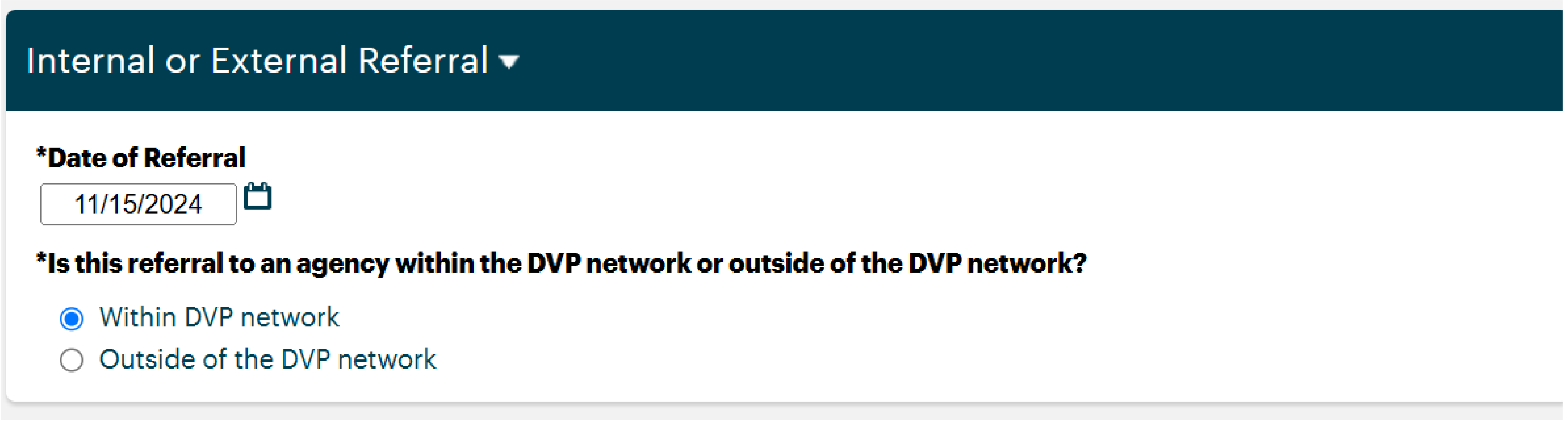
***End Time**

5:30 AM

DEPARTMENT OF VIOLENCE PREVENTION
CITY OF OAKLAND

Referral Form

Enter the date of the referral and identify whether the referral was to an agency within the DVP network or not. The next section will populate based on this answer.


Internal or External Referral

***Date of Referral**

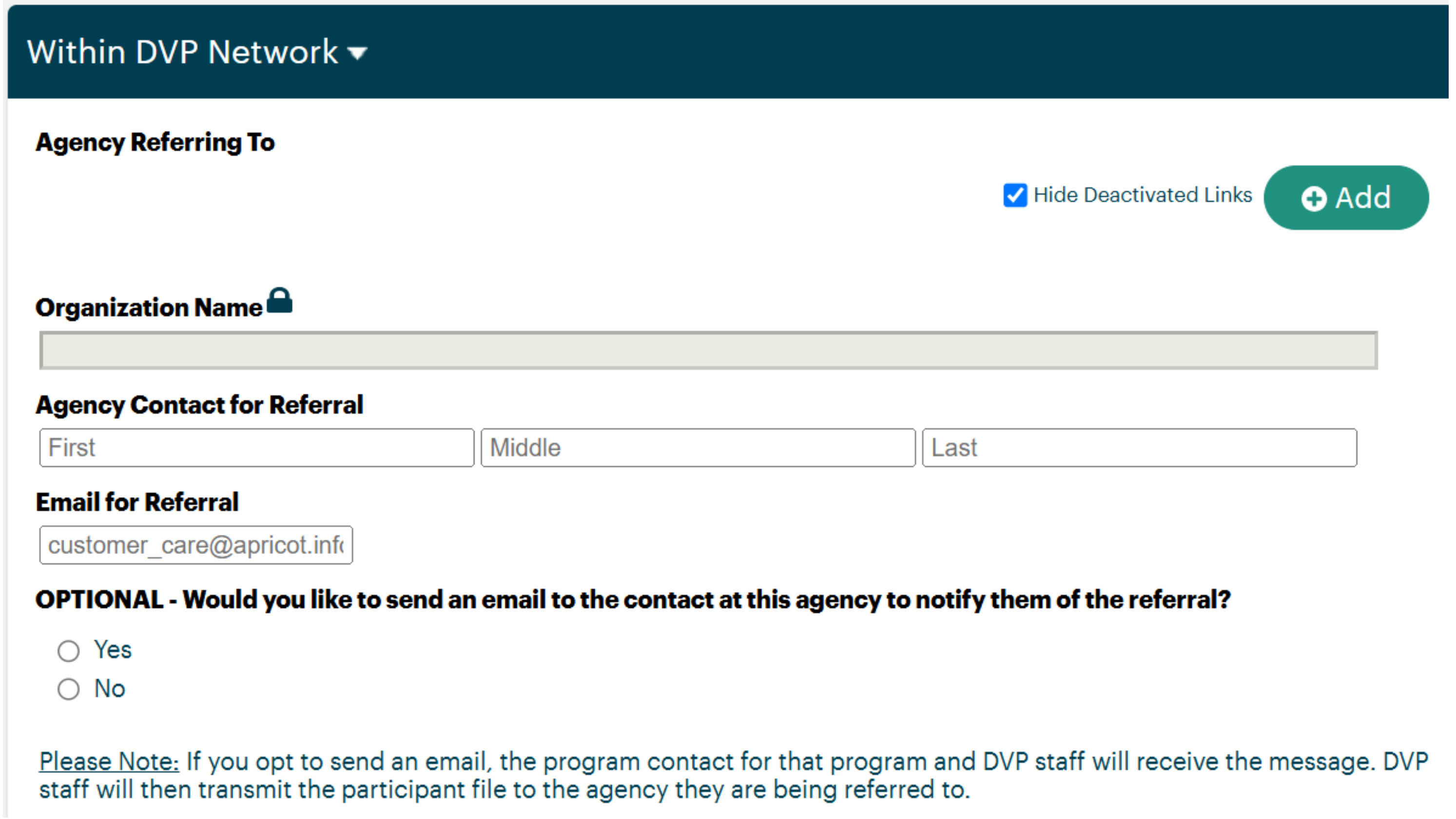
11/15/2024

***Is this referral to an agency within the DVP network or outside of the DVP network?**

- (selected) Within DVP network
- Outside of the DVP network

Referral Form

If the referral is to an agency **within the DVP network**, select the agency by clicking the “+ Add” button. You can choose to send a notification email to the program contact at that agency.



Within DVP Network

Agency Referring To

Hide Deactivated Links

Add

Organization Name

Agency Contact for Referral

First | Middle | Last

Email for Referral

customer_care@apricot.info

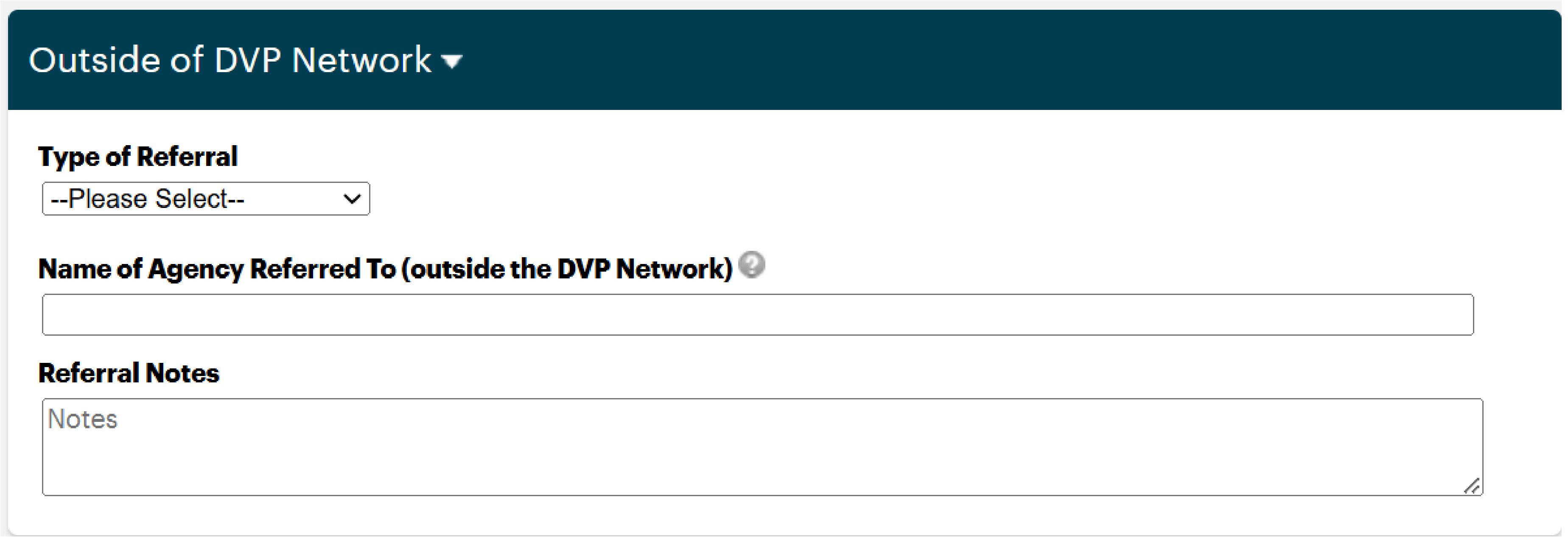
OPTIONAL - Would you like to send an email to the contact at this agency to notify them of the referral?

- Yes
- No

Please Note: If you opt to send an email, the program contact for that program and DVP staff will receive the message. DVP staff will then transmit the participant file to the agency they are being referred to.

Referral Form

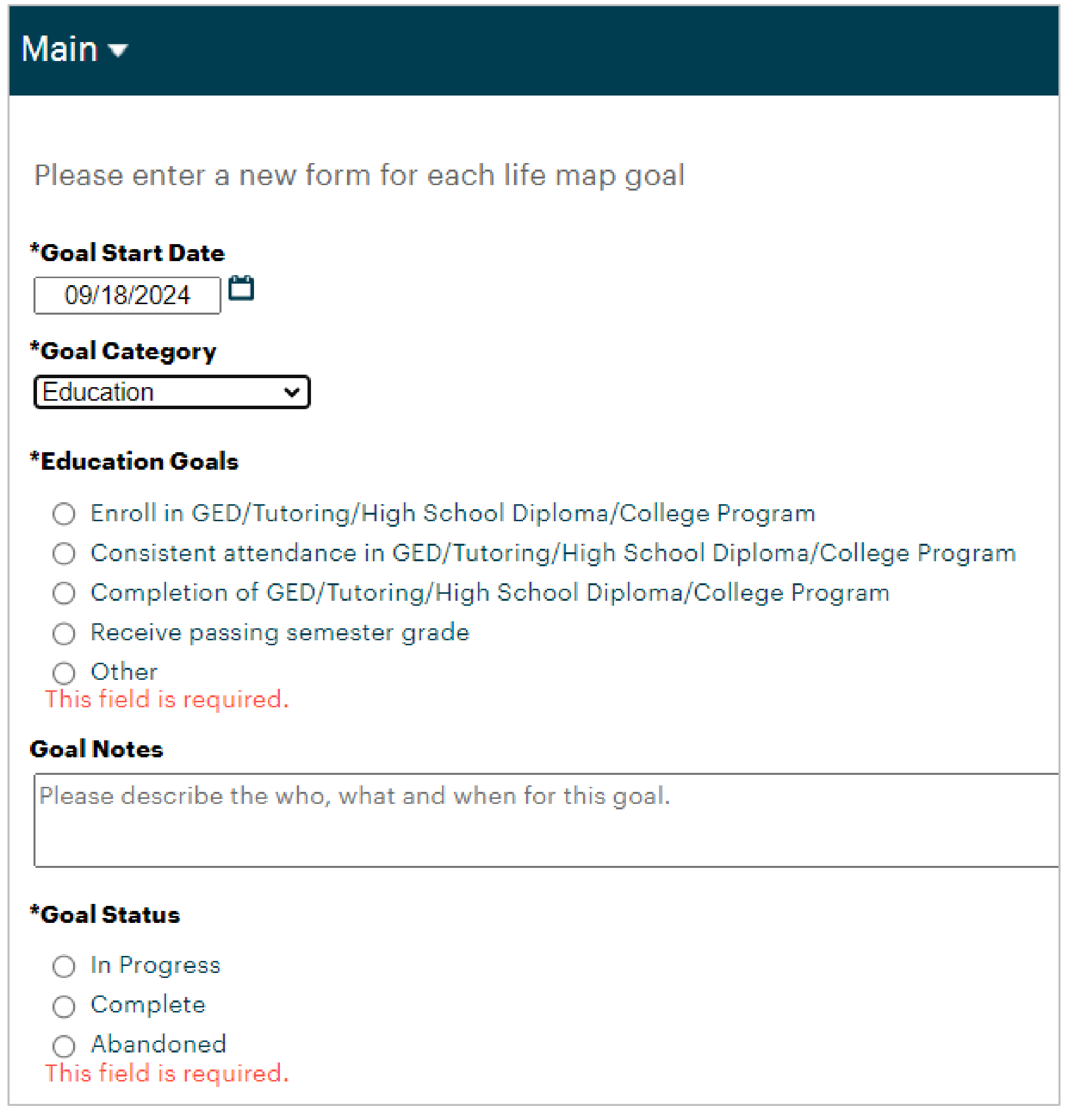
If the referral is to an agency **outside the DVP network**, select the type of referral and enter the name of the agency. You may also enter notes that would be helpful to the agency receiving the referral.



Life Map Goals & Incentives Form

To enter a **new life map goal**:

- **Step 1:** Select the goal start date and category.
- **Step 2:** Select the specific type of goal based on the category selected and add any helpful notes.
- **Step 3:** Select the goal's status. New goals will have an "in progress" status.



Main

Please enter a new form for each life map goal

***Goal Start Date**

09/18/2024

***Goal Category**

Education

***Education Goals**

- Enroll in GED/Tutoring/High School Diploma/College Program
- Consistent attendance in GED/Tutoring/High School Diploma/College Program
- Completion of GED/Tutoring/High School Diploma/College Program
- Receive passing semester grade
- Other

This field is required.

Goal Notes

Please describe the who, what and when for this goal.

***Goal Status**

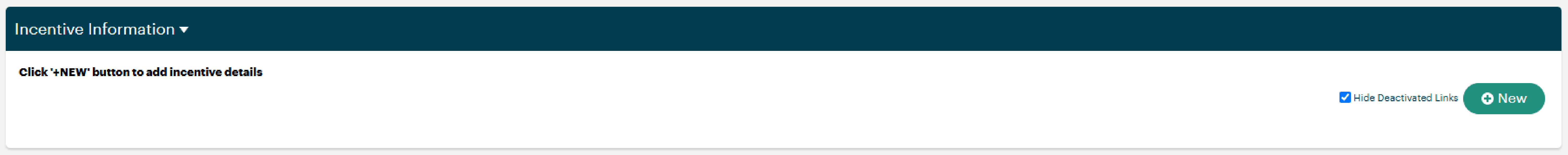
- In Progress
- Complete
- Abandoned

This field is required.

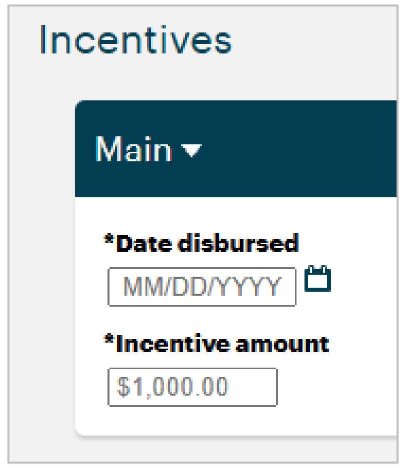
Life Map Goals & Incentives Form

To document an **incentive payment** associated with a life map goal:

- **Step 1:** Select “+ New” under the “Incentive Information” section.

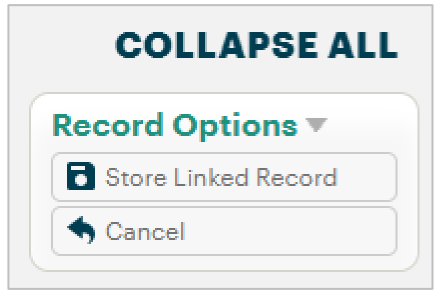


- **Step 2:** Enter the date the incentive was disbursed and the amount.

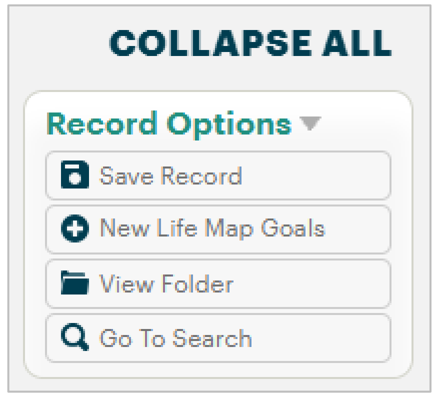


Life Map Goals & Incentives Form

- **Step 3:** Click “Store Linked Record” on the righthand side of the “Incentives” screen.



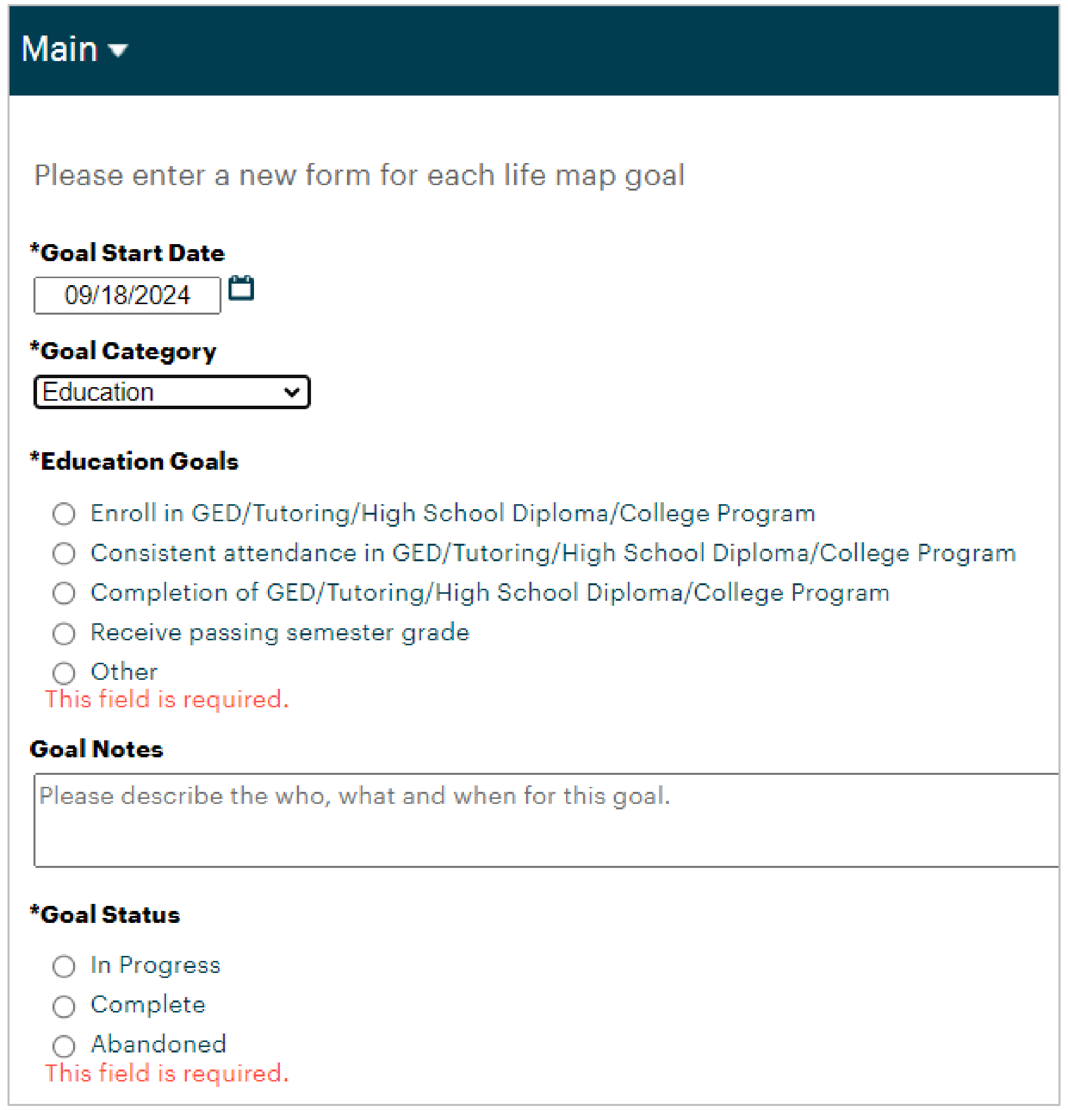
- **Step 4:** Click “Save Record” when you return to the “Life Map Goals and Incentives” screen.



Note that incentive payments should <u>only</u> be disbursed for goals that have been entered into Apricot.

Life Map Goals & Incentives Form

To document the **end of a life map goal**, return to the goal and change the goal status to “Complete” or “Abandoned.” Then, enter the date the goal was completed or abandoned in the field that appears.


Main

Please enter a new form for each life map goal

*Goal Start Date

09/18/2024

*Goal Category

Education

*Education Goals

- Enroll in GED/Tutoring/High School Diploma/College Program
- Consistent attendance in GED/Tutoring/High School Diploma/College Program
- Completion of GED/Tutoring/High School Diploma/College Program
- Receive passing semester grade
- Other

This field is required.

Goal Notes

Please describe the who, what and when for this goal.

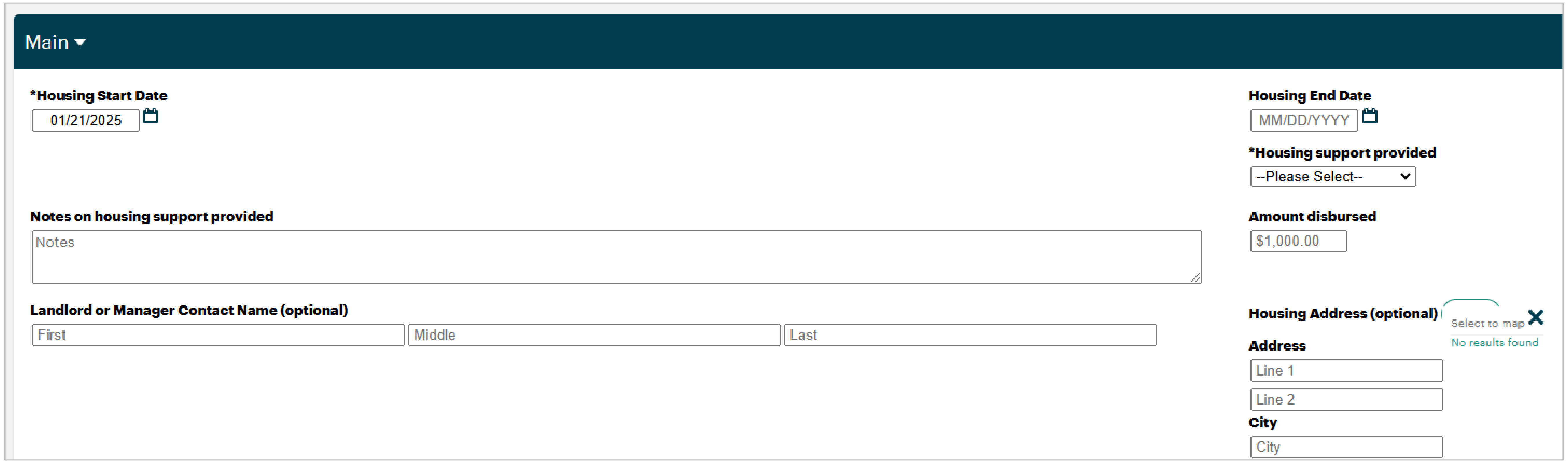
*Goal Status

- In Progress
- Complete
- Abandoned

This field is required.

Housing Placement Form

Complete a Housing Placement Form when a participant obtains housing as part of their services. If your agency disbursed funding to support the housing placement, enter the amount in “Amount disbursed.”


Main

*Housing Start Date
01/21/2025

Housing End Date
MM/DD/YYYY

*Housing support provided
--Please Select--

Notes on housing support provided
Notes

Amount disbursed
$1,000.00

Landlord or Manager Contact Name (optional)
First
Middle
Last

Housing Address (optional)
Select to map
No results found

Address
Line 1
Line 2

City
City

Work Exp/Job Placement Form

Complete a Work Experience/Job Placement Form when a participant obtains job training or placement as part of their services.


Main
* Employer
Hide Deactivated Links
Add
*Employer Name
*Job Start Date
MM/DD/YYYY
*Job Title
Employment Status
--Please Select--
Starting Wage
$1,000.00
Hours per Week
00

Work Exp/Job Placement Form

Return to the Work Experience/Job Placement Form to enter an end date and reason when the participant ends his or her job or training program, for whatever reason.