

# Apricot Data Entry: CBO Life Coaching

January 2025



# Table of Contents

03	<b>Program Enrollment</b>
04	> Enrolling a participant
07	> Exiting a participant
08	<b>Service Notes</b>
11	<b>Life Map Goals and Incentives</b>
16	<b>Referral</b>





# Program Enrollment

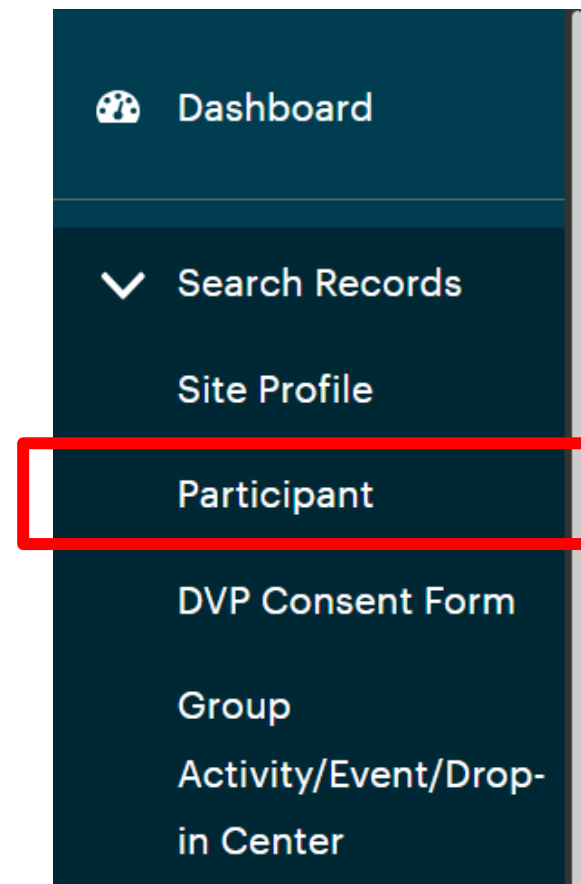




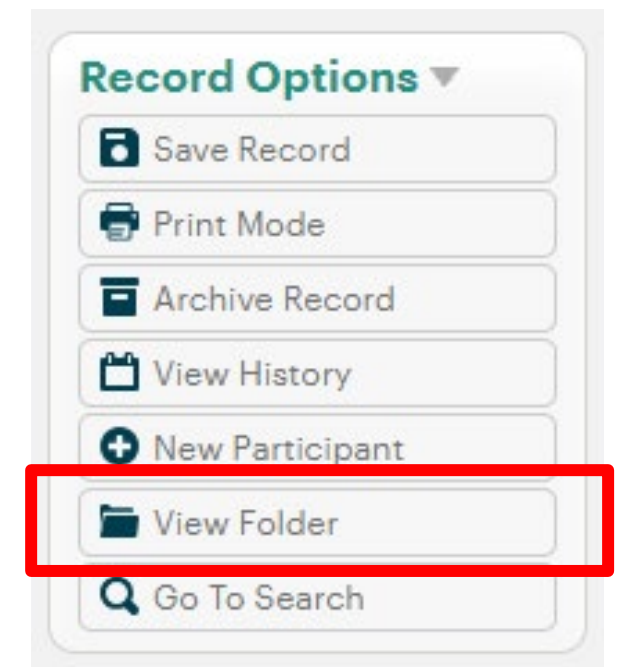
# Enrolling a Participant

Once a life coach meets with a participant and enrolls them into the program, they should create a Program Enrollment Form.

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












- 2 Find the participant and click on their name. Then, select “View Folder” on the right side of the screen.





# Enrolling a Participant

③ Click the “+” button next to “Program Enrollment.”

All Documents		<input type="checkbox"/> Expand Multiline	<input type="text" value="Search Forms"/>
<a href="#">+ Program Enrollment (0 records)</a>			
<a href="#">+ Ceasefire (0 records)</a>			
<a href="#">+ Service Notes (0 records)</a>			
<a href="#">+ Referral (1 record)</a>			
<a href="#">+ Intake and Needs Assessment (0 records)</a>			



# Enrolling a Participant

- 4 Complete the “Enrollment” section of the form. Then click “Save Record” on the right side of the screen.

**Enrollment** ▾

**\*Program Enrolling**  
DVP - Life Coaching ▾ ← Select “[Agency Name] – Life Coaching” for “Program Enrolling.”

**\*Site**  
Department of Violence Prevention (DVP) ▾ ← Select “Department of Violence Prevention” for “Site.”

**\*Start Date**  
04/02/2024 📅 ← Enter date

**\*Referral Source**  
Ceasefire-Custom Notification ▾ ← Select referral source


**Enrollment Notes**  
Notes



# Exiting a Participant

- Return to this program enrollment form when the individual exits the program.

Exit ▾

**Exit Date**  
  ← Enter date of last contact.

**\*Primary Reason for Exit**  
 ▾ ← Select the appropriate exit reason.  
This field is required.

**Length of Enrollment in Days**  
 ← This field will auto calculate.

**Exit Notes**





# Service Notes





# Service Notes

- 1 Click the “+” button next to “Service Notes” to enter the date and outcome of every outreach attempt, whether successful or not.

All Documents	<input type="checkbox"/> Expand Multiline	<input type="text" value="Search Forms"/>
<a href="#">+ Program Enrollment (0 records)</a>		
<a href="#">+ Ceasefire (0 records)</a>		
<a href="#">+ Service Notes (0 records)</a>		
<a href="#">+ Referral (1 record)</a>		
<a href="#">+ Intake and Needs Assessment (0 records)</a>		



# Service Notes

- 2 Complete the information on the service notes form. Then click “Save Record” on the right side of the screen.

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 ▾





# Life Map Goals and Incentives





# Life Map Goals and Incentives

- 1 Click the “+” button next to “Life Map Goals and Incentives” to enter each goal set.

All Documents		<input type="checkbox"/> Expand Multiline	<input type="text" value="Search Forms"/>
Program Enrollment (2 records)			
Ceasefire (2 records)			
Service Notes (88 records)			
Referral (0 records)			
Intake and Needs Assessment (1 record)			
Life Map Goals and Incentives (2 records)			





# Life Map Goals and Incentives

- ② Select the goal start date, category, notes, and status.  
NOTE: Remember to return to this form to update when a goal is completed.

Main ▾

Please enter a new form for each life map goal

**\*Goal Start Date**

09/18/2024

**\*Goal Category**

Education ▾

← Select category

**\*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

← Select the type of goal from the options, or click 'other' to enter if it is not listed

This field is required.

**Goal Notes**

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

**\*Goal Status**

- In Progress
- Complete
- Abandoned

← Most goals will start as 'in progress'.

This field is required.



# Life Map Goals and Incentives

- ③ When an incentive is disbursed for this goal, return to this form to update the end date and add incentive details.

*Note: Incentives should only be disbursed for goals that are input into Apricot.*

A screenshot of a web form. At the top, there is a field labeled "\*End Date" with a calendar icon and the placeholder text "MM/DD/YYYY". Below the field, it says "This field is required." in red. Below this is a dark teal header for "Incentive Information" with a dropdown arrow. Underneath, there is a text instruction: "Click '+NEW' button to add incentive details". At the bottom right of the form, there is a checkbox labeled "Hide Deactivated Links" and a green button with a white plus sign and the word "New".

← Select end date for when goal was completed (if applicable)

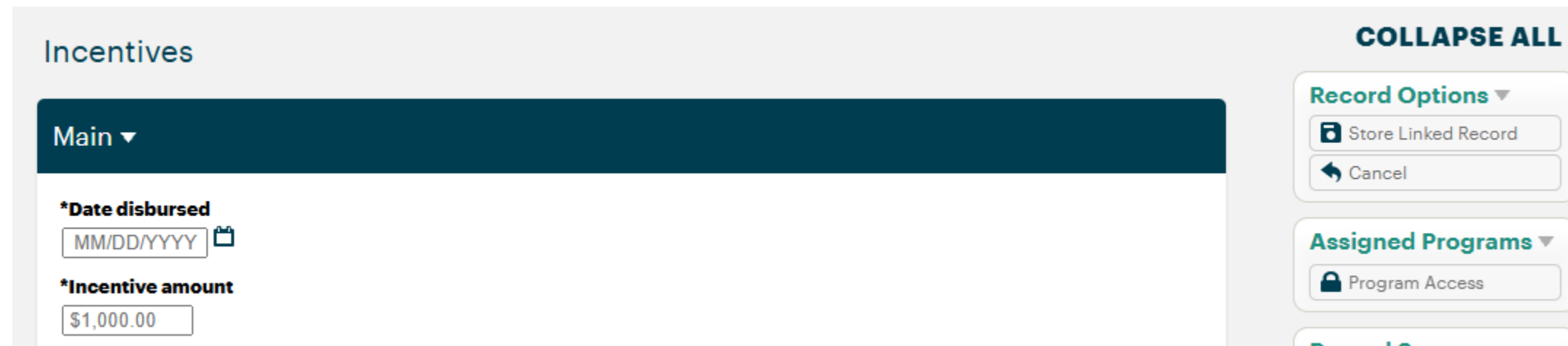
← Select '+new' to add incentive details





# Life Map Goals and Incentives

- ④ Enter each incentive and click 'store linked record' on the incentive page AND 'save record' on the main life map goal page



Click 'store linked record' on the righthand side of the incentive details page



Click 'save record' on the righthand side of the life map goals page





# Referrals





# Referrals

- 1 Click the “+” button next to “Referral” when you refer a client to any services.

All Documents		<input type="checkbox"/> Expand Multiline	<input type="text" value="Search Forms"/>
<a href="#">+ Program Enrollment (0 records)</a>			
<a href="#">+ Ceasefire (0 records)</a>			
<a href="#">+ Service Notes (0 records)</a>			
<a href="#">+ Referral (1 record)</a>			
<a href="#">+ Intake and Needs Assessment (0 records)</a>			

# Referrals – Within DVP Network



② Complete the information on the referral form. If the referral is within the DVP network, select which one, and you can choose to send an automated email to the program contact at that agency. Then click “Save Record” on the right side of the screen.

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?**

Within DVP network  
 Outside of the DVP network

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.inf

**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.

← Select 'within DVP network'

← Click '+Add' button to select the agency and program

← Select 'yes' if you would like the system to send an automated email



# Referrals - Outside DVP network



- 3 Complete the information on the referral form. If the referral is outside of the DVP network, enter the type of referral (housing, employment, etc.) and enter the name of the agency. Then click “Save Record” on the right side of the screen.

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?**

Within DVP network  
 Outside of the DVP network

Outside of DVP Network ▾

**Type of Referral**  
--Please Select-- ▾

**Name of Agency Referred To (outside the DVP Network) ?**

**Referral Notes**  
Notes

← Select 'outside of the DVP network'

← Select the type of referral

← Enter the name of the agency