

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.

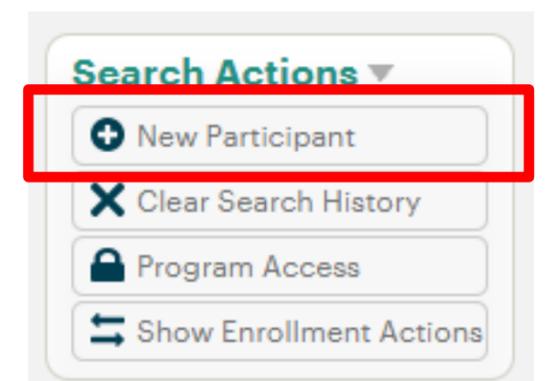
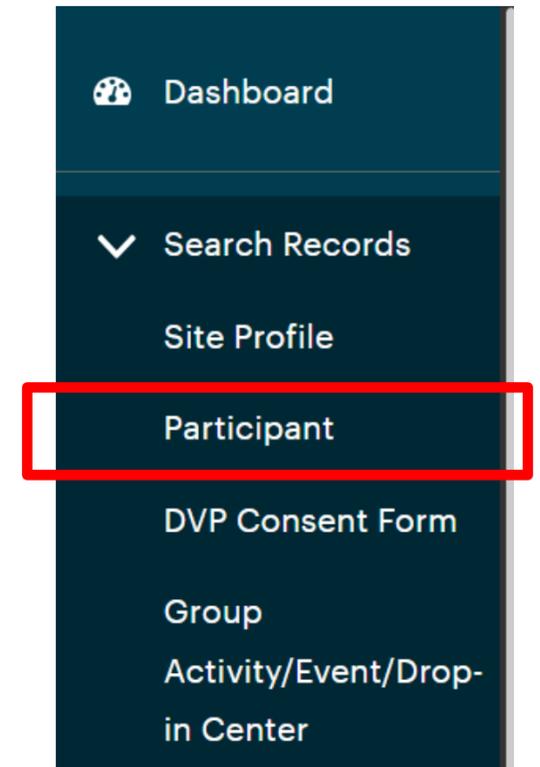
An aerial, high-angle photograph of a densely populated residential neighborhood. The houses are mostly two-story structures with gabled roofs, interspersed with trees and greenery. The sky is overcast with soft, grey clouds. The overall tone is muted and slightly desaturated.

Participant Records



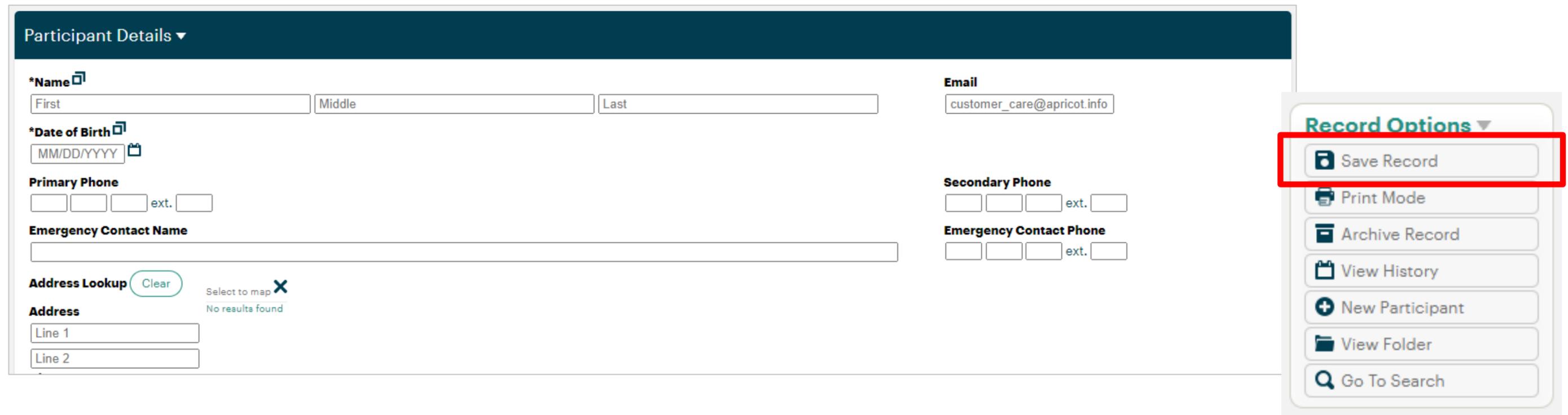
Creating a Participant Record

- **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.”



The screenshot shows a web form titled "Participant Details" with a dark teal header. The form is divided into several sections:

- *Name:** Three input fields for First, Middle, and Last names.
- Email:** A text input field containing "customer_care@apricot.info".
- *Date of Birth:** A date picker field showing "MM/DD/YYYY".
- Primary Phone:** A series of input fields for phone number and extension.
- Secondary Phone:** A series of input fields for phone number and extension.
- Emergency Contact Name:** A text input field.
- Emergency Contact Phone:** A series of input fields for phone number and extension.
- Address Lookup:** A section with a "Clear" button and a "Select to map" link.
- Address:** Two text input fields for "Line 1" and "Line 2".

On the right side of the form, there is a "Record Options" panel with a dropdown arrow. The "Save Record" button is highlighted with a red rectangular box. Other options in the panel include "Print Mode", "Archive Record", "View History", "New Participant", "View Folder", and "Go To Search".

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



Duplicate Records

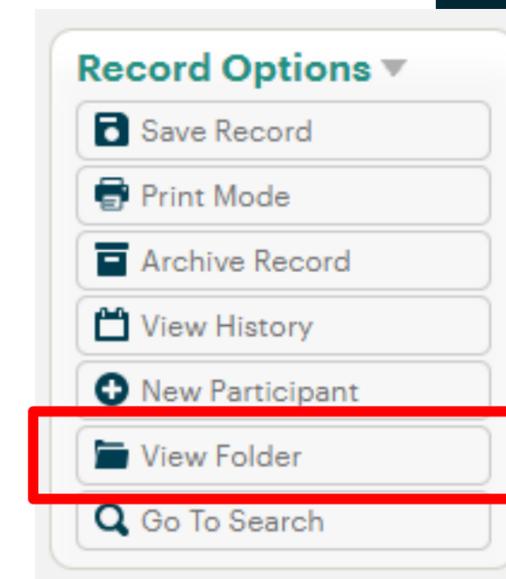
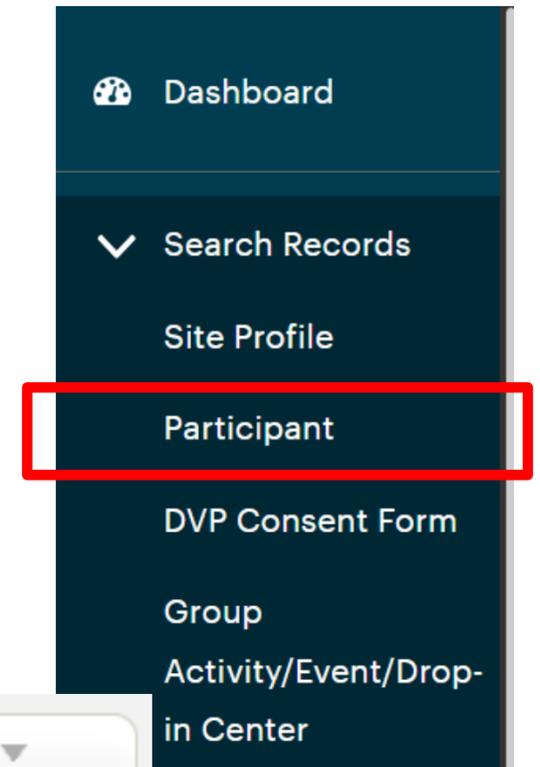
If a person is already in the system, a duplicate record message will appear.

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 is the participant's folder, where all service delivery records are stored.

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



Accessing a Participant's Folder

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

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

An aerial, high-angle photograph of a densely populated residential neighborhood. The houses are mostly two-story structures with various rooflines and colors, interspersed with green trees. The background shows a hazy horizon under a cloudy sky. The overall image has a light, desaturated color palette.

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

***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 ▾

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



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?**

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

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.

Outside of DVP Network ▾

Type of Referral
--Please Select-- ▾

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

Referral Notes
Notes



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.

A screenshot of a software interface showing the "Incentive Information" section. The section has a dark teal header with the text "Incentive Information" and a downward arrow. Below the header, there is a light gray area with the text "Click '+NEW' button to add incentive details". On the right side of this area, there is a checkbox labeled "Hide Deactivated Links" which is checked, and a green button with a white plus sign and the text "New".

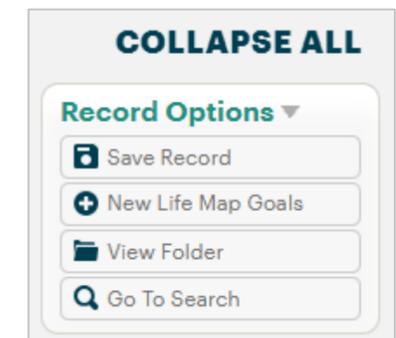
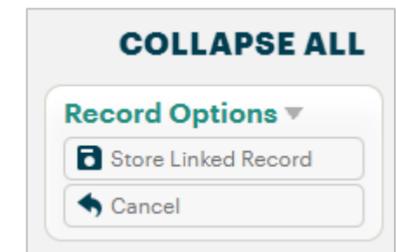
- **Step 2:** Enter the date the incentive was disbursed and the amount.

A screenshot of a form titled "Incentives". The form has a dark teal header with the text "Main" and a downward arrow. Below the header, there are two input fields. The first field is labeled "*Date disbursed" and contains the text "MM/DD/YYYY" with a calendar icon to its right. The second field is labeled "*Incentive amount" and contains the text "\$1,000.00".



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 only 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.”

A screenshot of a web-based form titled "Housing Placement Form". The form is displayed on a dark teal header with a "Main" dropdown menu. The form fields are organized into two columns. The left column contains: a required field for "Housing Start Date" with the value "01/21/2025" and a calendar icon; a text area for "Notes on housing support provided" with the placeholder text "Notes"; and three input fields for "Landlord or Manager Contact Name (optional)" labeled "First", "Middle", and "Last". The right column contains: a required field for "Housing End Date" with the placeholder "MM/DD/YYYY" and a calendar icon; a dropdown menu for "Housing support provided" with the selected option "--Please Select--"; a field for "Amount disbursed" with the value "\$1,000.00"; and a section for "Housing Address (optional)" which includes a "Select to map" button with a red 'X' icon, a "No results found" message, and three input fields for "Address" (Line 1, Line 2) and "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



*Job Title

Employment Status

▾

Starting Wage

Hours per Week



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.

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

Placement Closure ▾

Job End Date
MM/DD/YYYY 