Apricot User Training:
First 5 Yuba Strategic Partners
Phase 2: Data Entry & Practice

Onboarding Timeline

• Phase 2 Data Entry: Jan 24th – Feb 11th
• Phase 3 – Invoicing and Contracts: Mid February
• Phase 4 – Individualized Support: by Feb 28th
Training Logistics

Training will last between 1-2 hours Online &/or in person

- Everyone learns at a different pace so patience will be key.
- Hands on activities are crucial to understanding the software. Please Participate!
- Don’t be afraid to ask questions!

To successfully complete training you need the following

- Reliable Internet Connection
- The most updated version of Google Chrome or Mozilla Firefox
- Apricot username (your Site’s assigned email address) and password
Learning Objectives

This training will prepare you to incorporate Apricot into your day to day duties

This training will cover:
- Entering Various Types of Data
- Completing Workflows

Basic Navigation Refresher
The Bulletins Page

- Notifications
- Quick Links
- Reports
  - Performance Measures
  - Contract Spend

Left Side Palette

Search Records:
- Primary Forms
- Click a form name to search for records
Forms and Records

What is a form?
- Electronic templates in Apricot much like paper forms
- Designed by Administrator intended to collect data

What is a record?
- A saved copy of unique data within a form
- Viewed with other records in a report
Process – Search Records (Primary Records)

- Parent Profile
- Parent Family Intake Workflow
- Screening Log
- Referral Log
- Workshop / Event Log
- Post Workshop Survey

*Each of these records overtime will contain documents
Working with Parent Profile Records

Step 1: Search for a Parent.
Step 2: Click New Parent Profile on the right.
Step 3: Fill in the form.
Step 4: Save the Record.

Parent Profile Form

Required Fields:

- Have asterisks mark.
- Enter all data as a best practice.
Hands-On Activity: Create Parent Profile

1. Click the Parent Profile option on the left navigation palette.
2. Click New Parent Profile from the right.
3. Enter a person with last name ‘Fake’ or ‘Practice’*.
4. Enter remaining fields through the Custom Demographics section.
5. Click ‘Save Record’.
6. Select Parent Family Intake Workflow from the drop down of the Record Saved confirmation box.
7. Indicate whey you are done (either raise your hand or type D in the chat) and we’ll walk through the workflow together.
8. Do not move ahead until directed to do so.

*Use names you can easily remember. You will work with this record for the rest of the session.
Workflow

Walks you through the forms to complete as part of a new enrollment or other process.

- Triggered when new Primary record is saved.
- Streamlined data entry process
- May also be accessed from the My Apricot Tools section

Workflow Access

- Either from the left palette “My Apricot Tools” or
- When a Parent Profile is completed
Workflow Tasks

Step 1: Select the workflow from the drop box
Step 2: Click Next Task
Step 3: Fill in the form
Step 4: Click Save and Next

Workflow Navigation

- Task number on top
- Move from task to task via workflow actions on right
- View Workflow progress on bottom right
• The FIF is now the Annual Family Survey and is combined with a consent to release information with other First 5 Yuba Strategic Partners and participate in data collection and evaluation.

Hands-On Activity: Workflow

1. Complete the combined Annual Family Survey and Consent Form.
2. Click Save and Next.
Program Enrollment

- Reminder: Program Enrollment can be used for either a child or parent
- Must enter at least one per family

Hands-On Activity: Workflow

1. Complete the Program Enrollment Form.
2. Click Save and Next.
• If appropriate enter at least one child.
• You may enter up to four children as part of the workflow.
• Additional children may be added directly from the parent folder.

Hands-On Activity: Workflow

1. Click Next to complete the required Child Form.
2. Fill in the form
3. Click Save.
4. Click Finish in the Workflow Complete confirmation box
Documents Folder

1. Automatically created when saving a Primary Form
2. Each Type of Form on the left may contain documents
Accessing the Document Folder

**Step 1:** Click the Parent Profile under the Search Records

**Step 2:** Search for the desired record (Parent)

**Step 3:** Click the desired record from the search results

This folder provides:

- Quick access to edit primary details.
- Quick navigation to record secondary forms
Hands-On Activity: Open Document Folder

1. Click the Parent Profile option on the left navigation palette.
2. Select the Name option in the Add Search Field Drop Down.
3. Search for the fake Parent you created.
4. Click a grey column of data to open the fake Parent’s document folder.

*You will work with this record for the rest of the session.

Secondary Forms and Records

- Track information over time for a Parent, child or group.
- Can be completed more than once.
- Can only be accessed from the Document Folder.
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Create New Records

Step 1: Access the Document Folder
Step 2: Find the Form under All Documents
Step 3: Click the Create New icon on the right
Step 4: Complete the form
Step 5: Save!

Screening Log
### APRICOT USER TRAINING

#### Screening Log

**Access from the Parent's Document Folder**

- Scroll to Screening Log
- Select the new document icon (the green sheet of paper with the + inside)
- This takes you to a new blank screening log to complete.

<table>
<thead>
<tr>
<th>Document Folder</th>
<th>Census</th>
<th>Links</th>
<th>Appointments</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Documents</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Annual Family Survey (FIF) (1 record)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Child (1 record)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Program Enrollment (1 record)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Service Log (0 records)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Screening Log (0 records)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Referral Log (0 records)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Screening Log**

- Complete the form
- Select Save Record
Hands-On Activity: Create a New Record

1. Click the Create New icon to the right of the Screening Log Form in your Fake Parent’s document folder.
2. Complete the form.
3. Click Save Record.
Referral Log

Access from the Parent’s Document Folder

- Scroll to Referral Log
- Select the new document icon (the green sheet of paper with the + inside)
- This takes you to a new blank referral log to complete.

Referral Log

- Complete the form
- Select Save Record
Hands-On Activity: Create a Referral Log

1. Click the Create New icon to the right of the Referral Log Form in your Fake Parent’s document folder.
2. Complete the form.
3. Click Save Record.

End Program Enrollment
End Program Enrollment

Access from the Parent’s Document Folder

- Expand the Program Enrollment section
- Select the program you wish to end
- Scroll to the Program Exit Section
- Enter required fields
- Save Record
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Edit Records

Step 1: From the Document Folder scroll to the desired form.

Step 2: Click the toggle (+) to view all records of that form.

Step 3: Click the record to open it in the edit view.

Step 4: Edit the data and Save.

Classes & Terms
Classes & Terms

This tool provides:

- Ability to track series classes over time
- Track attendance and class completion
- Each will link to parent profiles

Accessed from My Apricot Tools

- May be used for rostered classes
- Classes with multiple session
- A class name may repeat but the terms should not (i.e., Fall 21, Oct-Dec 21)
- Not recommended for individual events such as Daisy, Special Speaker, stand alone workshop
Classes & Terms

Working with Classes & Terms

- Step 1 – Create a new class
- Step 2 – Create term with dates and completion criteria if appropriate
- Step 3 – Enroll participants

In Class Details & Terms

- You are able to select which sites can access the class
- Enter multiple terms (i.e., morning, afternoon)
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In the Terms Details

• You are able to enroll participants at any time, even after the start date.
• Un-enroll participants, and
• Track attendance

Hands-On Activity: Classes & Terms

1. From My Apricot Tools, click Classes and Terms.
2. Click New Class.
3. Enter information for your Fake class and select “Save Class” in the lower right of the screen.
4. Select the eye icon to the right of your fake class.
5. Click New Term. Enter the required information and select “Save Term” in the lower right of the screen.
6. Select the eye icon to the right of your fake term.
7. Click Enroll Participants and select several fake students for your class and select “Save.”
8. Indicate when you are done and we’ll all move forward together.
Hands-On Activity: Attendance

1. From the class details page, select the eye icon to the right of your fake class term.
2. Navigate to Attendance.
3. Select the checkmark “✓” or “x” as appropriate for each student.
4. Indicate when you are done and we’ll all move forward together.

Event Log
Workshop & Event Log

- Use this for individual workshops and events
- Example: Presentation, community outreach, driv-thru

Workshop & Event Log

- Complete form
- Save record
Hands-On Activity: Workshop/Event Log

1. From Search Records select Workshop/Event Log
2. Select New Workshop/Event from the Search Actions Palette to the right
3. Complete the form and
4. Select Save Record from the Record Options Palette.

*NOTE:* When practicing in Apricot, please use “Fake” or “Practice” in the Event form name.

Practice items will be deleted by the Administrator by the end of Q3 (March 31, 2022)

Thank you for joining us!

We look forward to seeing you in future trainings.