



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



APRICOT USER TRAINING



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!



© SOCIAL SOLUTIONS 3

APRICOT USER TRAINING



Training Logistics

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



© SOCIAL SOLUTIONS 4

APRICOT USER TRAINING



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



© SOCIAL SOLUTIONS

5



Basic Navigation Refresher

APRICOT USER TRAINING

The Bulletins Page

- Notifications
- Quick Links
 - Parent Search
 - Log Workshop/Event
 - Start A Workflow
- Reports
 - Performance Measures
 - Contract Spend

The screenshot shows the Apricot web application interface. At the top right, there are logos for 'FIRST 5 YUBA COUNTY' and 'ASR'. The header includes the 'apricot' logo, 'MY APRICOT ADMINISTRATOR', 'All Sites Program All Programs', and user information for 'Sabrina Gilbert'. The main content area is titled 'Apricot Bulletins' and features a 'Quick Links' section with buttons for 'Parent Search', 'Log Workshop/Event', and 'Start A Workflow'. Below this is a 'Contract Spend Dashboard' showing a report for 'December 2nd 2021, 10:39 am' with a bar chart comparing 'Contract spend down' for two categories: 'Camptonville Community Partnership - SF22-104 - FY21-22' (3.72K vs 34.06K) and 'Dolly Parton Inspiration Library - Yuba Affiliates - SF20-100 - FY21-22' (3.5K vs 30K).



© SOCIAL SOLUTIONS

7

- ▼ Search Records
 - Parent Profile
 - Workshop/Event Log
 - General Parent Support or Service Survey
 - General Post Workshop Survey
 - Referral
 - Organization Profile
 - Grantee Profile

Left Side Palette

Search Records:

- Primary Forms
- Click a form name to search for records



© SOCIAL SOLUTIONS

8



APRICOT USER TRAINING

FIRST5
YUBA COUNTY
COMMUNITY AND ECONOMIC DEVELOPMENT

ASR

Forms and Records

What is a form?

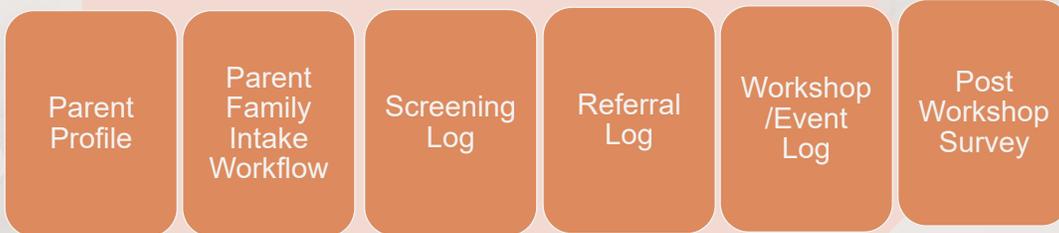
- Electronic templates in Apricot much like paper forms
- Designed by Administrator intended to collect data

What is a record?

- A saved copy of unique data within a form
- Viewed with other records in a report

 © SOCIAL SOLUTIONS 10

Process – Search Records (Primary Records)



*Each of these records overtime will contain documents



Parent Profile

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.



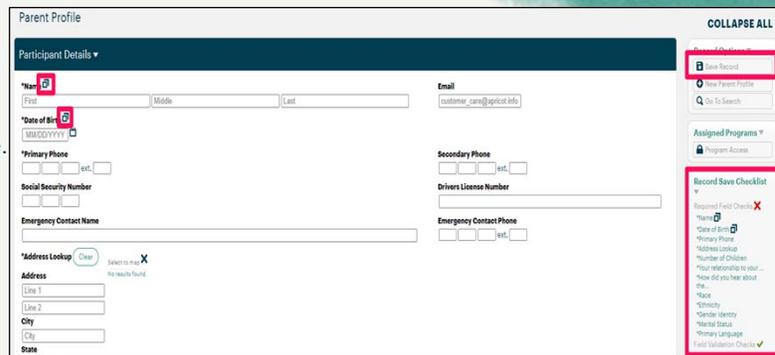
Parent Profile



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 when 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.

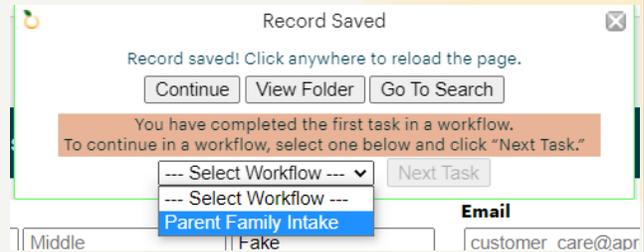
*Use names you can easily remember. You will work with this record for the rest of the session.



Workflow

Workflow

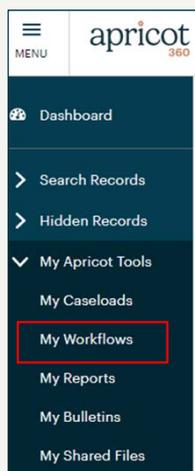
Walks you through the forms to complete as part of a new enrollment or other process.



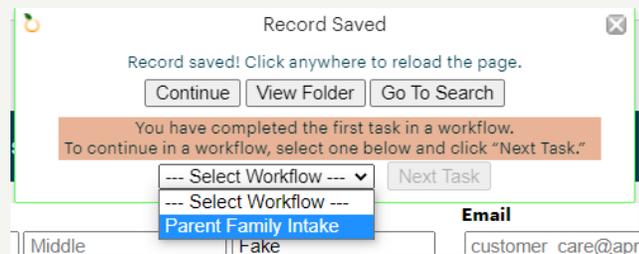
- Triggered when new Primary record is saved.
- Streamlined data entry process
- May also be accessed from the My Apricot Tools section



Workflow Access



- Either from the left palette "My Apricot Tools" or
- When a Parent Profile is completed



APRICOT USER TRAINING



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

Record Saved
Record saved! Click anywhere to reload the page.
Continue View Folder Go To Search

You have completed the first task in a workflow.
To continue in a workflow, select one below and click "Next Task."

1 -- Select Workflow -- 2 Next Task

Parent Profile

Participant Detail

*Name Email

*Date of Birth

*Primary Phone ext.

Secondary Phone ext.



© SOCIAL SOLUTIONS

19

APRICOT USER TRAINING



Workflow Navigation

- Task number on top
- Move from task to task via workflow actions on right
- View Workflow progress on bottom right

Workflow: Parent Family Intake (Task 2 of 8)

Consent to Participate

Jeff Fake
Quick View Information

Consent

*Preferred language
 English / Ingles
 Spanish / Espanol

Consent to Participate / Consentimiento para participar

- I agree to be included in the evaluation. / Estoy de acuerdo en ser incluido en la evaluación.
- I authorize my information to be shared with other agencies to coordinate care for my family. / Yo autorizo a que se comparta mi información con otras agencias para fines de coordinación de los servicios que recibe mi familia.

*Do you consent to participate? / ¿Acepta participar?
 Yes / sí
 No / no

*Name / Nombre

COLLAPSE ALL

Workflow Actions

- Previous Task
- Save
- Save and Next
- Return to My Workflows

Assigned Programs

Workflow Progress

Parent Profile

Consent to Participate

Parent Profile

Consent to Participate

Consent to Participate

Consent to Participate

Consent to Participate



© SOCIAL SOLUTIONS

20

APRICOT USER TRAINING

Workflow: Parent Family Intake (Task 2 of 7)

Annual Family Survey (FIF)

Fakey McFake Fake

Quick View Information ▶

- 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.

Annual Family Survey (FIF)

Carmen FAKE

Quick View Information ▶

Details ▶

Child Information ▶

Connecting Your Family to Services ▶

Consent ▼

***Preferred language**

English / Ingles

Spanish / Espanol

Consent to Participate / Consentimiento para participar

- I agree to be included in the evaluation. / Estoy de acuerdo en ser incluido en la evaluación.
- I authorize my information to be shared with other agencies to coordinate care for my family. / Yo autorizo a que se comparta mi información con otras agencias para coordinar el cuidado de mi familia.

***Do you consent to participate? / ¿Aceptas participar?**

Yes / si

No / no

***Signature**

Name

Full Name

Signature

© SOCIAL SOLUTIONS 21

Hands-On Activity: Workflow

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



APRICOT USER TRAINING



Program Enrollment

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

Workflow: Parent Family Intake **Task 3 of 7)**

Program Enrollment

Fakey McFake Fake

Quick View Information ▶

Program Enrollment

George R Fake

Quick View Information ▶

Enrollment ▼

***Start Date**

This field is required.

***Select associated contract/program**

This field is required.

Enrollment Notes

Notes

Program Exit ▼

Exit Date



CIAL SOLUTIONS

23

Hands-On Activity: Workflow

1. Complete the Program Enrollment Form.
2. Click Save and Next.



APRICOT USER TRAINING

Workflow: Parent Family Intake (Task 4 of 7)
Child

- 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.

Child Search

Fakey McFake Fake

Quick View Information ▾

Name	Fakey McFake Fake
Email	Fakey@fake.com

-- Add Search Field -- ▾ Browse All

Select a record below to update it

Child (0 record)

Intake Date ▾	Child's Name ▾	Search Results
---------------	----------------	----------------

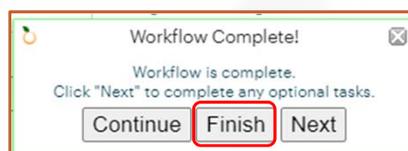
Search Actions ▾

- ➕ New Child
- ✕ Clear Search History

© SOCIAL SOLUTIONS 25

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





APRICOT USER TRAINING

SEARCH RECORDS
Parent Profile
Workshop/Event Log
General Parent Support or Service Survey
General Post Workshop Survey
Referral
Organization Profile
Grantee Profile

FIRST5 YUBA COUNTY
ASR

Documents Folder

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

Fakey McFake Fake

DOCUMENT FOLDER CENSUS LINKS APPOINTMENTS

All Documents

Form Type	Count	Actions
Annual Family Survey (AIFS)	1 record	View, Print
Child	1 record	View, Print
Program Enrollment	1 record	View, Print
Service Log	0 records	View, Print
Screening Log	1 record	View, Print
Referral Log	2 records	View, Print
Edinburgh Postnatal Depression Scale (EPDS)	0 records	View, Print
BEST Parenting Survey	0 records	View, Print
Help Me Grow Creative Arts Play Group Exit Survey	0 records	View, Print
Parenting Program Survey Pre/Post	0 records	View, Print
Upload File	0 records	View, Print

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

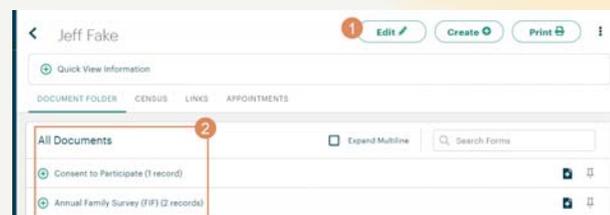


Name	Date of Birth
Jeff Fake	10/29/2021
Test Faker	11/03/2021
Fake Other-Practice	10/28/1932

Document Folder

This folder provides:

- Quick access to edit primary details.
- Quick navigation to record secondary forms



All Documents	Expand Multiline	Search Forms
Consent to Participate (1 record)		
Annual Family Survey (AFS) (2 records)		

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.

APRICOT USER TRAINING



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.

All Documents <input type="checkbox"/> Expand Multiline <input type="text" value="Search Forms"/>			
⊖ Annual Family Survey (FF) (1 record)			
		DATE	
		01/18/2022	
⊖ Child (2 records)			
INTAKE DATE	CHILD'S NAME	CHILD DOB	
01/18/2022	Ginger Fake	04/01/2020	
01/18/2022	Fred Fake	04/01/2018	
⊖ Program Enrollment (1 record)			
START DATE	SELECT ASSOCIATED CONTRACT/PROGRAM	EXIT DATE	
01/18/2022	SP18-103 Help Me Grow Yuba		



APRICOT USER TRAINING



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!

The screenshot shows a user interface for a document management system. At the top, there's a header with 'Fakey McFake Fake' and buttons for 'Edit', 'Create', and 'Print'. Below this is a 'DOCUMENT FOLDER' section with a red callout box '1' pointing to the 'DOCUMENT FOLDER' tab. Underneath is an 'All Documents' section with a red callout box '2' pointing to the 'All Documents' header. A list of documents is shown, including 'Annual Family Survey (FF) (3 records)', 'Child (2 records)', and 'Program Enrollment (3 records)'. A red callout box '3' points to the 'Create New' icon on the right side of the 'Program Enrollment' row. The bottom right corner of the screenshot shows '© SOCIAL SOLUTIONS' and the page number '33'.



© SOCIAL SOLUTIONS

33

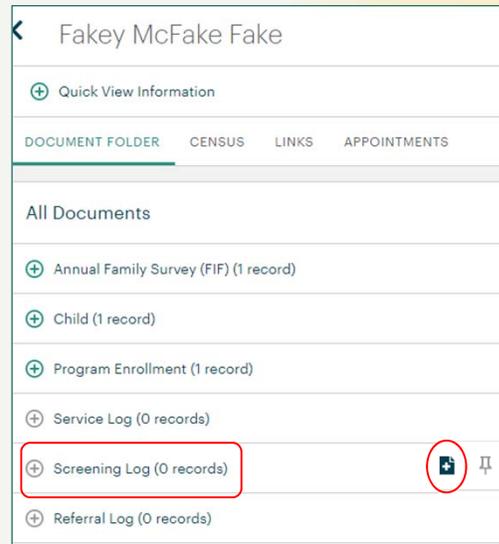


Screening Log

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.



Screening Log

- Complete the form
- Select Save Record

Screening Log

Fakey McFake Fake

Quick View Information ▶

Details ▼

*Select an associated Program Enrollment
 -- Please Select --
This field is required.

*Date
 MM/DD/YY

*Which child was this screening for?
 -- Please Select --

*Screening type
 -- Please Select --

*Result required?
 Yes
 No

Notes
 Notes

System Fields ▶



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

APRICOT USER TRAINING





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.

Fakey McFake Fake

+ Quick View Information

DOCUMENT FOLDER CENSUS LINKS APPOINTMENTS

All Documents

- + Annual Family Survey (FIF) (1 record)
- + Child (1 record)
- + Program Enrollment (1 record)
- + Service Log (0 records)
- + Screening Log (0 records)
- + Referral Log (0 records) 

© SOCIAL SOLUTIONS 39

APRICOT USER TRAINING





Referral Log

- Complete the form
- Select Save Record

Referral Log

Fakey McFake Fake

Quick View Information ▶

Details ▼

***Select associated Program Enrollment**
 If you don't see a Program Enrollment for this Referral, p in services.
This field is required.

***Referral Date**
 

***Program making the referral**

***Referral Type**

Referral Organization (optional)
 Hide Deactivated Links Add

***Referral Organization Name** 

This field is required.

***Was this referral made as a result of a screening?**
 Yes
 No

Reason for referral

40

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

APRICOT USER TRAINING



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

+ Program Enrollment (1 record)

START DATE	SELECT ASSOCIATED CONTRACT/PROGRAM
01/25/2022	SP18-103 Help Me Grow Yuba

Enrollment ▾

*Start Date
12/14/2021

*Select associated contract/program
SP20-109 Dolly Parton's Imagination Library ▾

Enrollment Notes
Notes

Program Exit ▾

Exit Date
01/04/2022

*Primary Reason for Exit
Aged out of Program ▾

Length of Enrollment in Days
21

Exit Notes
This is a text file

System Fields ▾



Edit Records

APRICOT USER TRAINING



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.

The screenshot shows a user interface for 'Jeff Fake'. At the top, there are buttons for 'Edit', 'Create', and 'Print'. Below is a 'Quick View Information' section. A navigation bar includes 'DOCUMENT FOLDER', 'CENSUS', 'LINKS', and 'APPOINTMENTS'. The 'DOCUMENT FOLDER' section is active, showing 'All Documents' with an 'Expand Multiline' toggle and a search bar containing 'pro'. A section titled 'Program Enrollment (2 records)' contains a table with the following data:

PROGRAM ENROLLING	SITE	START DATE	EXIT DATE
Example Program B	Location B	11/10/2021	
Example Program A	Location A	11/05/2021	11/05/2021



© SOCIAL SOLUTIONS

45



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

Classes & Terms 

All Classes New Class 

NAME	STATUS	TERMS TOTAL	TERMS IN PROGRESS		
Positive Discipline January to February	Active	1 terms	1 terms		
PALS Playgroup 2021-2022	Active	1 terms	1 terms		
Practice	Active	1 terms	0 terms		
Positive Discipline	Active	1 terms	1 terms		
Practice F5	Active	1 terms	1 terms		
Parenting Workshop Q2 FY21-22	Active	1 terms	0 terms		

View  Page of 1 



Classes & Terms

> Search Records
> Hidden Records
▼ My Apricot Tools
My Caseloads
My Workflows
My Reports
My Bulletins
Schedule
Classes & Terms
My Referrals

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

Classes & Terms

All Classes New Class

NAME	STATUS	TERMS TOTAL	TERMS IN PROGRESS	
Positive Discipline January to February	Active	1 terms	1 terms	
PALS Playgroup 2021-2022	Active	1 terms	1 terms	
Positive Discipline	Active	1 terms	1 terms	
Practice F5	Active	1 terms	1 terms	
Parenting Workshop Q2 FY21-22	Active	1 terms	0 terms	

View 20 Page 1 of 1



In Class Details & Terms

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

Class Details *Required

NAME

DESCRIPTION

SITE(S)

Select which site(s) should have access to this class.

STATUS

Terms New Term

NAME	PROGRAM	START DATE	END DATE	
Fall 2021		08/17/2021	12/17/2021	

View 5 Page 1 of 1



APRICOT USER TRAINING



In the Terms Details

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

The screenshot shows two views of the Apricot system interface. The top view is the 'Term Details' page for 'Fall 2021' with program 'ABC Sprout'. It features a 'Show More' dropdown and an 'Edit' button. The 'Attendance' section below has a circled 'Enroll Participant(s)' button with a dropdown arrow, and a 'Session Manager' button. The bottom view shows the 'Attendance' page for 'Dec 2021'. It displays a calendar grid with days from Sunday to Saturday. Below the calendar is a table of participants with columns for each day. The 'Enroll Participant(s)' button is also circled in red here. The table shows attendance for five participants: R Fake, Jane Fake, Hazeltine Fake, Victor Fake, and test FAKE. Each cell in the table contains a green checkmark, a red 'X', and a trash icon.



© SOCIAL SOLUTIONS

51

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

APRICOT USER TRAINING

FIRST 5 YUBA COUNTY
Children and Families Commission

ASR

Workshop & Event Log

- Search Records
- Parent Profile
- Workshop/Event Log**
- General Parent Support or Service Survey

Workshop/Event Log Search

... Add Search Field ... | Browse All

The following 13 Workshop/Event Log records are available

Event Name %	Type %	Is part of Scope of Work? %
A Winter Holiday Walk Through	Community Event	No
Fake 3/vent Q2	Other Activity/Event	No
Fake Financial Lit. Workshop Q4 2021	Community Workshop or Event	Yes
FAKE PRACTICE	Community Workshop or Event	No
Fake Story Time	Community Workshop or Event	Yes
First 5	Class Series	Yes
Fortaleza en Familia	Community Workshop	Yes
Fortaleza en Familia #2 Cedar Lane	Class Series	Yes
Peach Festival	Community Event	No
Q4 test event	Community Workshop or Event	Yes
Test Workshop	Community Workshop or Event	Yes
Twinsies*	Class Series	No
Yuba Library Trick or Treat	Other Activity/Event	No

Search Actions

- + New Workshop/Event**
- X Clear Search History
- Program Access
- Create Referral

© SOCIAL SOLUTIONS 55

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

APRICOT USER TRAINING

FIRST 5 YUBA COUNTY
Children and Families Commission

ASR

Workshop & Event Log

- Complete form
- Save record

*Event Name

Date
MM/DD/YY

*Type
--Please Select--

*Is part of Scope of Work?
 Yes
 No
This field is required.

Length in Hours
0.0

Location

Language
 English
 Spanish
 Hmong

Presenter

Collaborative Partner(s)

Attendance

Number of parents: 00
Number of children: 00

Record Options

- Save Record**
- + New Workshop/Event
- Go To Search

Assigned Programs

- Program Access

Record Save Checklist

- Required Field Checks **X**
- *Event Name
- *Is part of Scope of Work?
- *Type
- Field Validation Checks **✓**

Form Logic Rules

- Is Part of Scope of Work contains "Yes"

© SOCIAL SOLUTIONS 56

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 for 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.**