Apricot User Training:
First 5 Yuba Strategic Partners

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Onboarding Timeline

- **Phase 1 Intro and Apricot Basics**: Jan 4-5th
- **Phase 2 Data Entry**: Mid January – Date/Time TBD
- **Phase 3 – Invoicing and Contracts**: Early February
- **Phase 4 – Individualized Support**: by Feb 28th
Onboarding Overview

• Why Apricot
  • Online streamlined system
  • Fast, reliable, sustainable
  • Transform the way we serve families

• Evolving System

• Provide Feedback
Training Logistics

Each training will last between 1-2 hours online &/or in person

- Reliable Internet Connection
- The most updated version of **Google Chrome** or **Mozilla Firefox**
- Apricot username (your email address) and password
What is Apricot?
What is Apricot?

- Cloud based (no downloads required)
- Collect information about people and services
- Designed and tailored to fit program needs
- Streamline data entry
- View reports on your data
- Saves time
Our Site and Program Structure

First 5 Yuba

- Camptonville Community Partnership
- 1,2,3 Grow

YCOE

- Child Dev. Behavior Consult
- Family Resource Center
- Child Care Planning Council
Logging In
Assigning Roles & Users

Regarding Selecting a User and assigning roles consider:

1- Frontline staff
2- Manager, program oversight
3- Fiscal staff

*NOTE: 1 account per agency
Logging Into Apricot

1. Navigate to apricot.socialsolutions.com
2. Verify the server/location is correct
3. Enter your email address and password
4. Note: 1 user and password per agency
Forgot Password

Use the forgot password link to reset your password via email.

• If you receive the “expired token” error message at initial log in, click Forgot Password.

• If locked out; click forgot password to reset.

• Password criteria is set by your Administrator.
The User Badge

Click the arrow to the right of your name to access:

- User preferences
- Change password
- Logout
The Bulletins Page

• Notifications
• Quick Links
• Reports
  • Performance Measures
  • Contract Management
The Bulletins Page

• Notifications
• Quick Links
• Reports
  • Contract Management
  • Performance Measures
Left Side Palette

Search Records:

• Click a form name to search for records
Left Side Palette

My Apricot Tools:

• My Reports
• My Bulletins
• My Classes & Terms
• My Referrals
Grantee Profile

- Basic profile info
- Update & review regularly
- Primary phone number
- Primary email address
- Fiscal email address (may be the same as primary)
- Web site if applicable
Grantee Folder

- This is an electronic version of the physical file at the First 5 office.
- Eventually your Scope of Work, Evaluation Plan and more will be available here.
- It can be used to upload current proof of insurance, program flyers, and more.
Forms and Records

What is a form?

- Electronic templates in Apricot much like paper forms (i.e., survey, consent form)
- Designed by Administrator intended to collect data

What is a record?

- A saved copy of unique data individual data within a form (a completed FIF or results of a survey)
- Viewed with other records in a report
Forms and Records

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

1. Automatically created when saving a new Primary record
2. Each Form/Record on the left may contain documents
Parent Profiles
APRICOT USER TRAINING

Parent Profile

From the Bulletins, choose the **Parent Search** option.

Although you can navigate directly to Create a New Parent Profile, it is **best practice** to first search to make sure a **Parent Profile** does not already exist in Apricot.

If this is your first time searching for Parent Profiles, Apricot will show you all profiles in the system that you have access to.

To narrow down the search results, click “Add Search Field” and select what you would like to search by (Name or Child’s Name)
In this example, we have searched by first name. Notice how the results are filtered down for matches on first name. You can add as many search fields as you need to narrow down the profiles further.

- **NOTE:** Apricot will “remember” your last search criteria the next time you navigate to this screen. Click the “x” on the far right if you want to remove a search field.
Parent Profile

If no match is found, click the New Parent Profile button on the Search Actions Menu (to the right of the search results)

Fill out the Parent Profile while paying attention to the duplicate checks and required fields

Then click Save Record – Apricot DOES NOT automatically save a record
Annual Family Survey

• The FIF is now known as the Annual Family Survey

• Also includes consent to participate
  • electronically
  • Paper
  • verbal
Child Profile

Instructions:

Complete one (1) Child record per child associated with this Parent. Child records may be updated if information about the Child changes otherwise Child records should remain as is after completing intake.

*Intake Date
MM/DD/YY

*Child’s Name
First Middle Last

*Child DOB
MM/DD/YY

Child Sex
□ Boy
□ Girl

Preferred Language
□ English
□ Spanish
□ Other

Ethnicity
□ Please Select

Has a special need diagnosed by a professional?
□ Yes
□ No

Comments/Notes

Notes:
Workshop/Event Log
Workshop & Event Log

- Use this for individual workshops and events
- Example: Presentation, community outreach, driv-thru
## Workshop & Event Log

**Event Name**

**Date**
- MM/DD/YY

**Type**
- Please Select

**Is part of Scope of Work?**
- Yes
- No

**Length in Hours**
- 0.0

**Location**

**Language**
- English
- Spanish
- Hmong

**Presenter**

**Collaborative Partner(s)**

**Attendance**

<table>
<thead>
<tr>
<th>Parents</th>
<th>Children</th>
</tr>
</thead>
<tbody>
<tr>
<td>00</td>
<td>00</td>
</tr>
</tbody>
</table>

- Complete form
- Save record
Classes & Terms
# APRICOT USER TRAINING

## Classes & Terms

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Terms Total</th>
<th>Terms In Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>PALS Playgroup 2021-2022</td>
<td>Active</td>
<td>1 terms</td>
<td>1 terms</td>
</tr>
<tr>
<td>Positive Discipline</td>
<td>Active</td>
<td>1 terms</td>
<td>0 terms</td>
</tr>
<tr>
<td>Practice F5</td>
<td>Active</td>
<td>1 terms</td>
<td>0 terms</td>
</tr>
<tr>
<td>Parenting Workshop Q2 FY21-22</td>
<td>Active</td>
<td>1 terms</td>
<td>0 terms</td>
</tr>
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</table>

View: 20 | Page: 1 of 1
## Attendance

### View Today: Jan 2022

<table>
<thead>
<tr>
<th>First Name</th>
<th>Date of Birth</th>
<th>Status</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gigi Fake</td>
<td>1978-06-29</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Jane Fake</td>
<td>2001-12-13</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>George Fake</td>
<td>1984-04-07</td>
<td>✔</td>
<td>✔</td>
</tr>
</tbody>
</table>
Next Steps

- Assign **Roles & Responsibilities** – Due January 7, 2021
  Email Robin at rtimoszyk@co.yuba.ca.us
- Review and begin **Onboarding Checklist**
- Office hours every Friday 1:00 PM- 3:00PM
- User Guide- Version 1 Coming
- Attend Phase 2 training- Mid January- Date/time TBD
Thank you for joining us! We look forward to seeing you for the Phase 2 training.

Change is hardest at the beginning, messiest in the middle and best at the end.

Robin S. Sharma