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**Academy**

# Apricot User Training: First 5 Yuba Strategic Partners

**Ericka Summers**

Executive Director

**Robin Timoszyk**

Program Specialist

# Onboarding Timeline

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



# 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



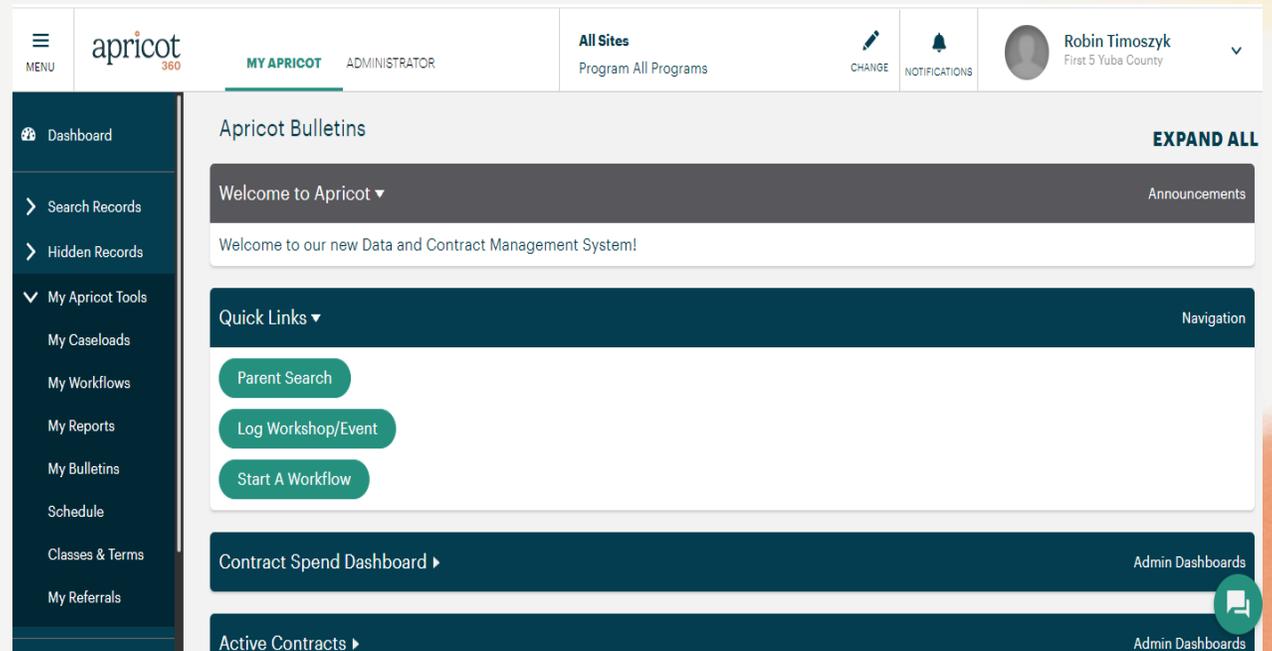


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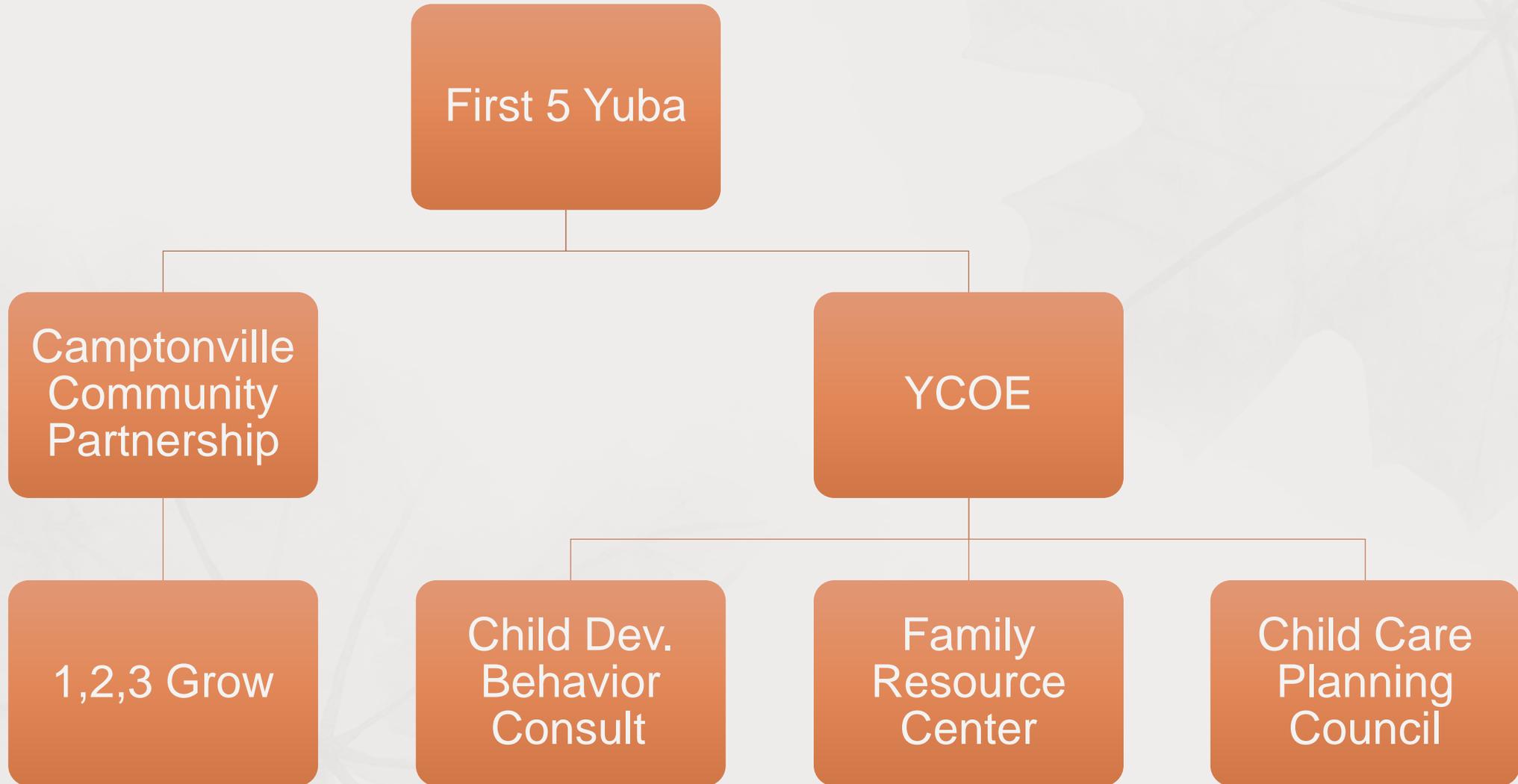
# What is Apricot?

# 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





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# 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**

**Apricot Roles and Responsibilities**

Please fill out accordingly for your Agency

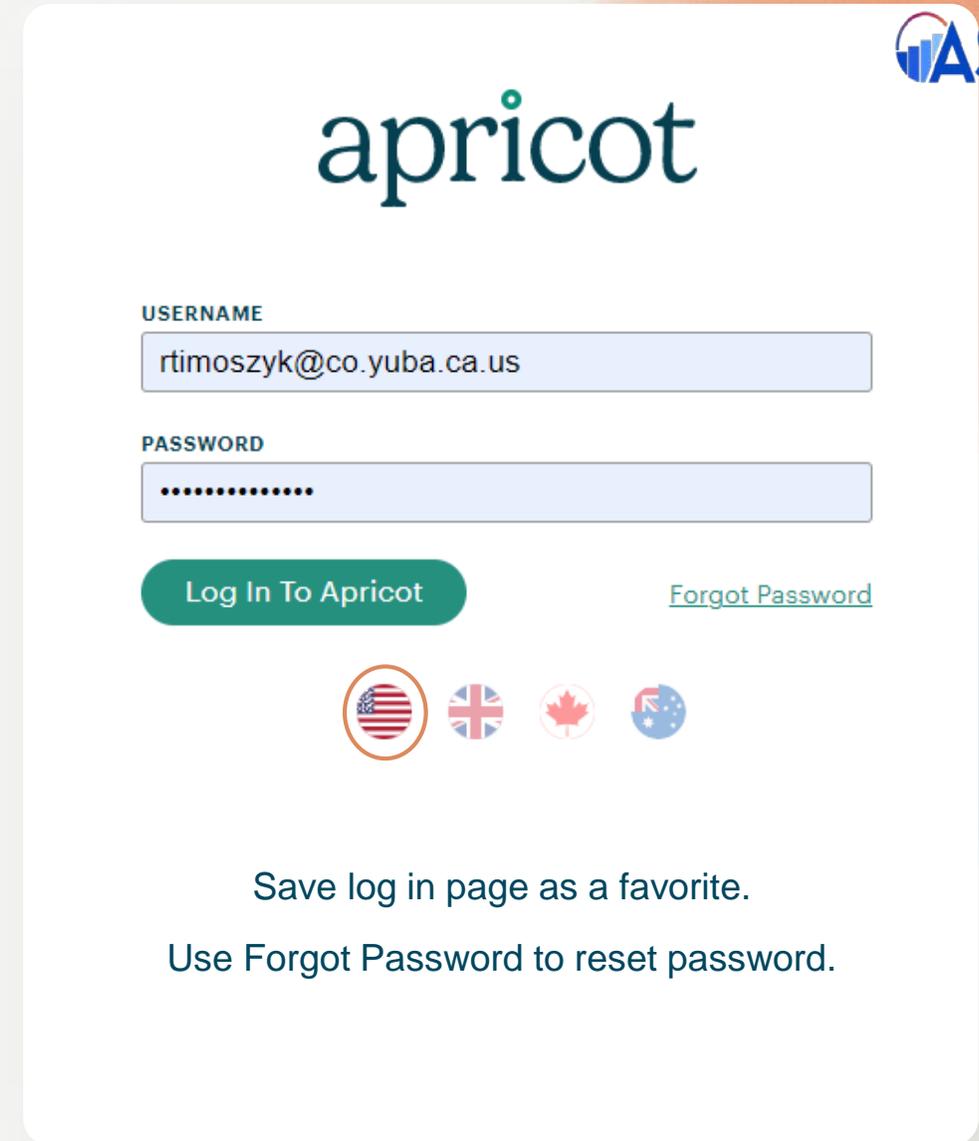
Agency Name: \_\_\_\_\_

Name	Title & Brief Description	Phone	Email	Role 1- Daily User 2- Manager/Program Oversight 3- Fiscal	Primary User or Secondary
<b>EXAMPLE: Ericka Summers</b>	Executive Director -Reviews quarterly reports, Provides fiscal guidance	530-749-4877	<a href="mailto:esummesr@co.yuba.ca.us">esummesr@co.yuba.ca.us</a>	1-Manager/Program Oversight	Secondary
<b>EXAMPLE: Robin Timosyk</b>	Program Specialist -works directly with families & enters data and collects surveys regularly			1-Daily User	Primary



# Logging Into Apricot

1. Navigate to [apricot.socialsolutions.com](https://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**

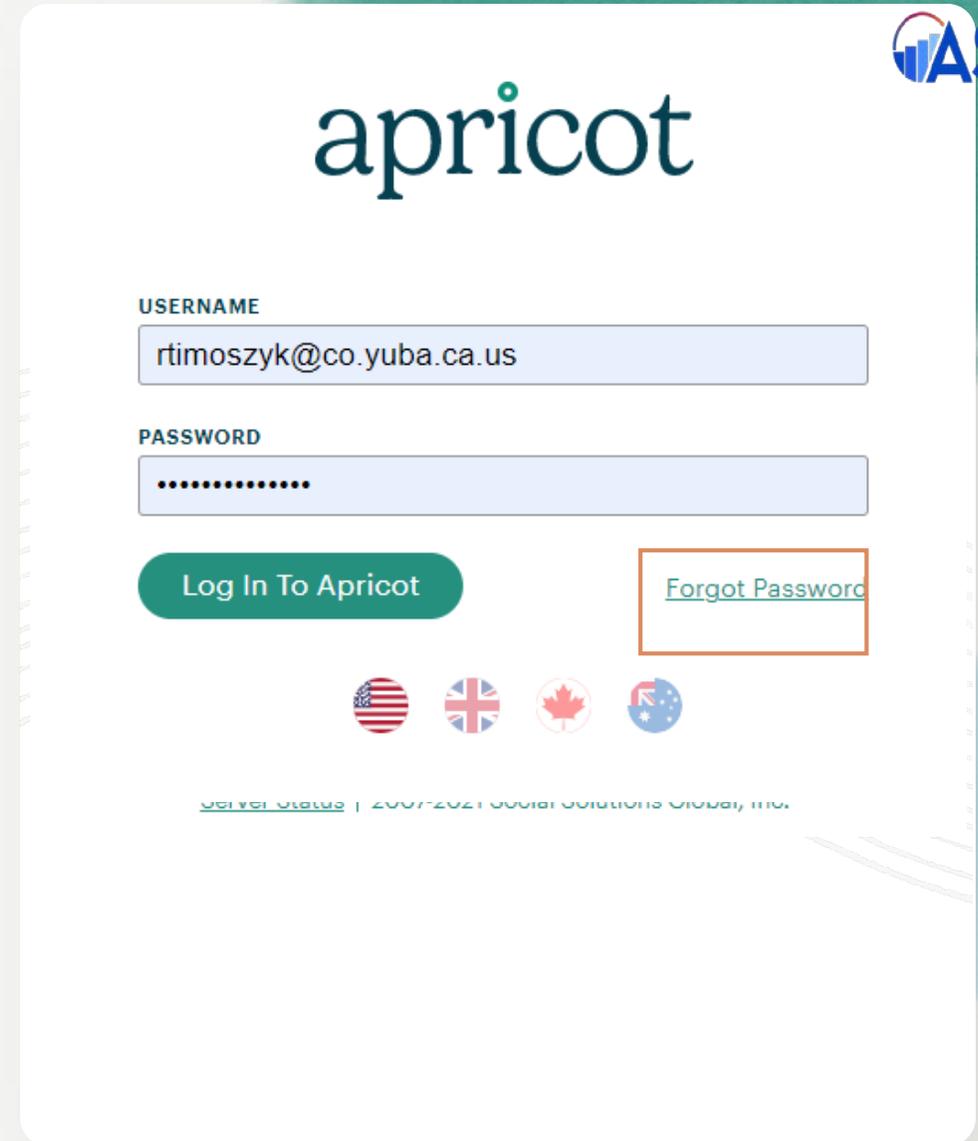


The screenshot shows the Apricot login interface. At the top right is the 'apricot' logo. Below it are two input fields: 'USERNAME' containing 'rtimoszyk@co.yuba.ca.us' and 'PASSWORD' with masked characters. A green 'Log In To Apricot' button is positioned below the password field, with a '[Forgot Password](#)' link to its right. Underneath are four circular icons representing the United States, United Kingdom, Canada, and Australia. At the bottom, there are two lines of text: 'Save log in page as a favorite.' and 'Use Forgot Password to reset password.'

# 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.





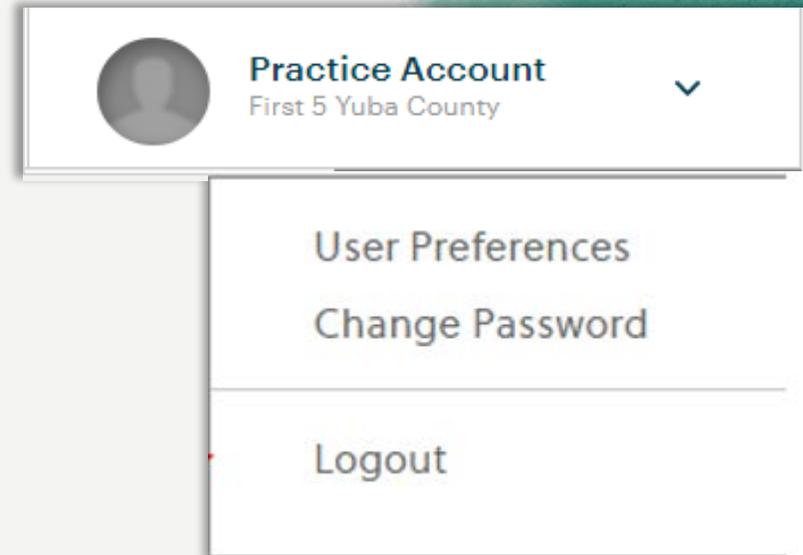
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# Basic Navigation

# 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 screenshot displays the Apricot 360 web application interface. At the top, the navigation bar includes a menu icon, the 'apricot 360' logo, the user's role 'MY APRICOT ADMINISTRATOR', and the current site 'All Sites Program All Programs'. The left sidebar contains a navigation menu with options: Dashboard, Search Records, Hidden Records, My Apricot Tools (expanded), My Caseloads, My Workflows, My Reports, My Bulletins, Schedule, Classes & Terms, and My Referrals. The main content area is titled 'Apricot Bulletins' and features a blue header with 'Welcome to Apricot'. Below this, a white box contains a welcome message: 'Welcome to our new Data and Contract Management System!' followed by three onboarding phases: 'Phase 1: Introduction', 'Phase 2: Data Entry & Practice', and 'Phase 3: Parent Connect, Invoicing & Contracts'. A 'Quick Links' section below contains three buttons: 'Parent Search', 'Log Workshop/Event', and 'Start A Workflow'. At the bottom, a dark blue bar contains a 'Contract Spend Dashboard' link.

# The Bulletins Page

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



▼ Search Records

Parent Profile

Workshop/Event

Log

General Parent

Support or Service

Survey

General Post

Workshop Survey

Referral

Organization Profile

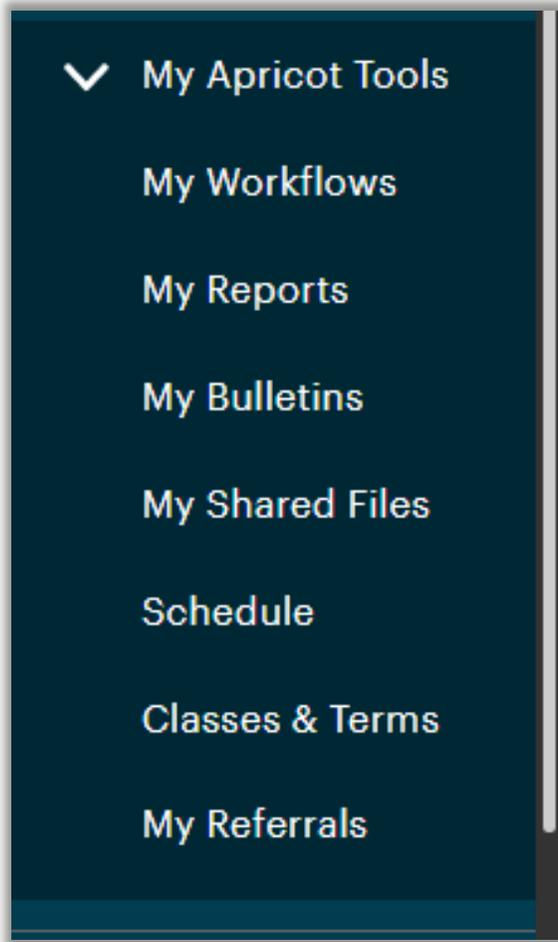
Grantee Profile

# Left Side Palette

Search Records:

- 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

Grantee Profile

Grantee Profile Search

-- Add Search Field -- [Browse All](#)

The following 14 Grantee Profile records are available

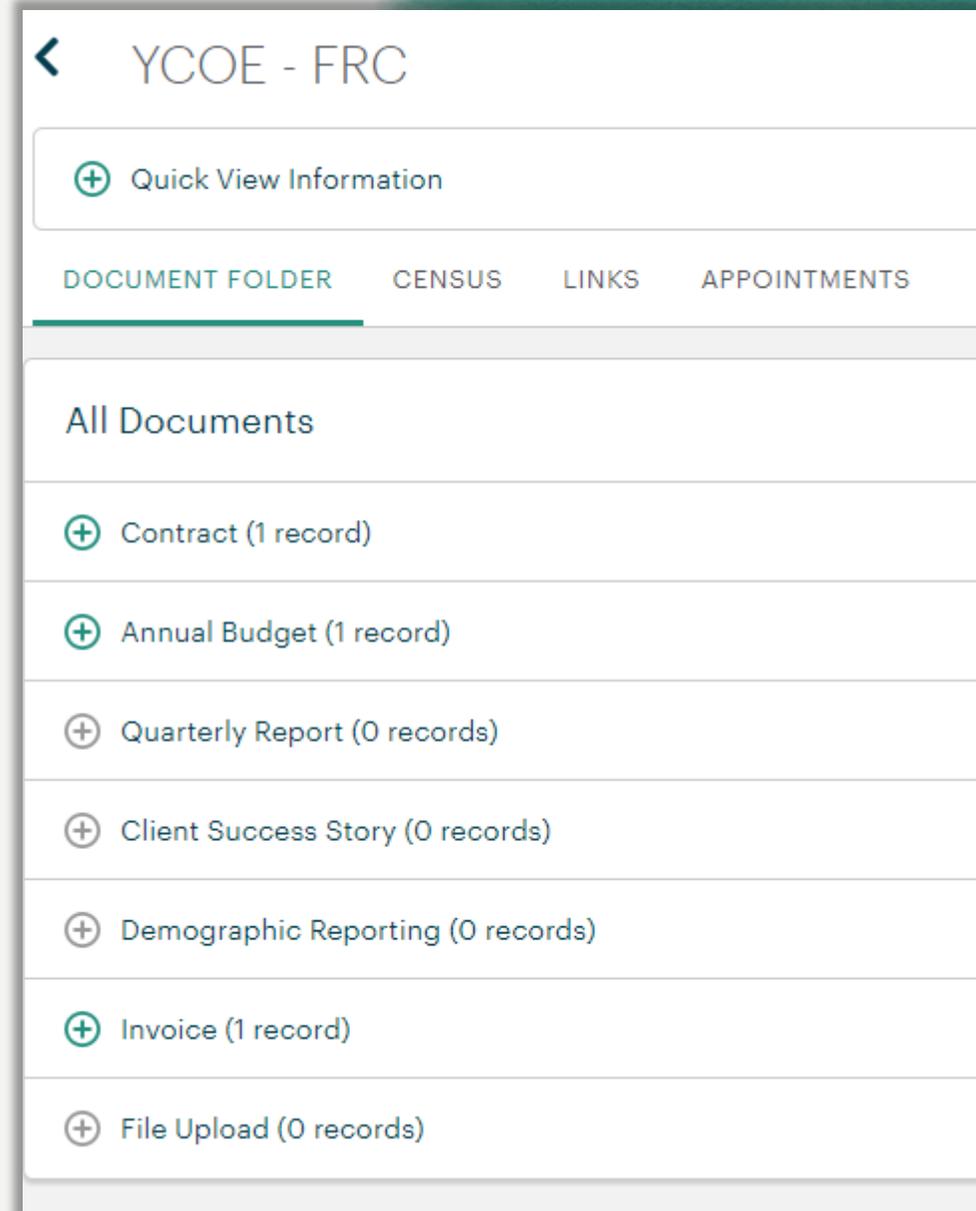
Organization Name ▲	Vendor Code/Number ▲	Primary Email ▲	Phone ▲	Address Lookup ▲
Camptonville Community Partnership	SP22-104	cathy@theccp.org	530-288-9355	16585 School Street 🏠
Child Care Planning Council of Yuba & Sutter Counties	SP22-105	tonya.byers@yubacoe.k12.ca.us	530-749-4040	1104 E Street 🏠
Dolly Parton's Imagination Library - Yuba Affiliate	SP20-109	first5@co.yuba.ca.us	530-749-4877	1114 Yuba Street 🏠

- 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.





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# Forms and Records

# 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



▼ Search Records

Parent Profile

Workshop/Event  
Log

General Parent  
Support or Service  
Survey

General Post  
Workshop Survey

Referral

Organization Profile

Grantee Profile

# 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.



 Search Records

Parent Profile

Workshop/Event  
LogGeneral Parent  
Support or Service  
SurveyGeneral Post  
Workshop SurveyReferral  
Organization Profile

Grantee Profile

# Document Folder

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

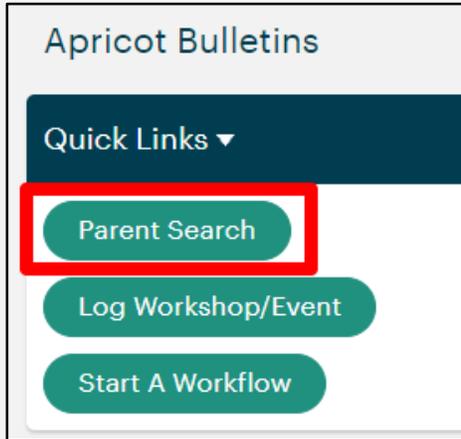




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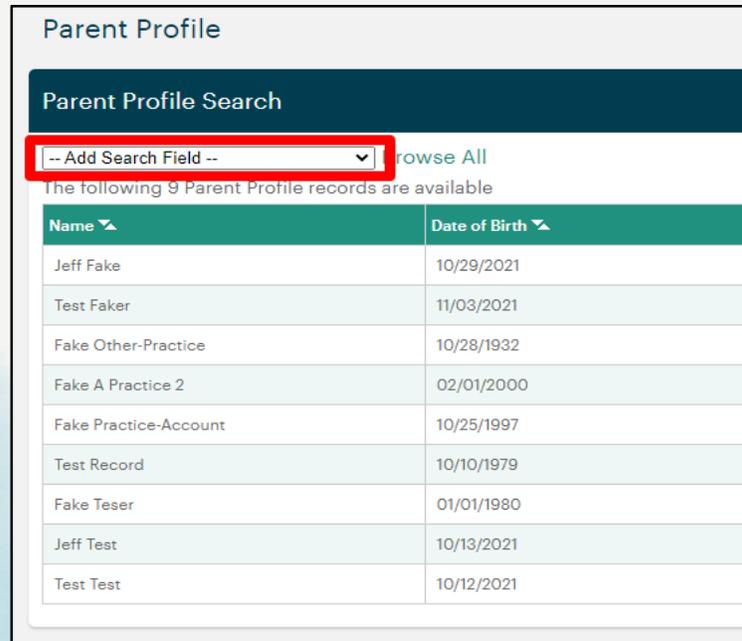
# Parent Profiles

# 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)



# Parent Profile

Parent Profile

Parent Profile Search

-- Add Search Field -- Browse All

**Name (Parent Profile)** [Clear Field](#)

X

The following 3 Parent Profile records matched your search criteria

Name ▾	Date of Birth ▾
Test Faker	11/03/2021
Test Record	10/10/1979
Test Test	10/12/2021

Click any of the mint text to go directly to that record. Clicking any gray text will take you to the Tier 1 document folder.

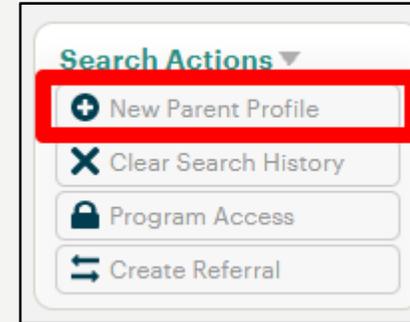
In this example, we have searched by first name. Notice how the results are filtered down for matches on first name. You can add as many search fields as you need to narrow down the profiles further.

- 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

A screenshot of the 'Parent Profile' form. The form is titled 'Parent Profile' and has a 'Participant Details' section. The form contains several fields: 'Name' (First, Middle, Last), 'Date of Birth' (MM/DD/YYYY), 'Primary Phone', 'Secondary Phone', 'Social Security Number', 'Drivers License Number', 'Emergency Contact Name', 'Emergency Contact Phone', and 'Address' (Line 1, Line 2, City, State). There are also 'Address Lookup' and 'Email' fields. On the right side, there is a 'COLLAPSE ALL' button and a 'Record Save Checklist' section. The 'Record Save Checklist' section lists various required and field validation checks, with a red box highlighting the 'Save Record' button and the checklist itself. The checklist shows that 'Name' and 'Date of Birth' are required, and 'Field Validation Checks' are passed.



# Annual Family Survey

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 / sí
- No / no

**\*Signature**

Name

Full Name

Signature

- The FIF is now known as the Annual Family Survey
- Also includes consent to participate
  - electronically
  - Paper
  - verbal



# Child Profile

**Main** ▾

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**

**\*Child's Name**

**\*Child DOB**

**Child Sex**

Boy  
 Girl

**Preferred Language**

English  
 Spanish  
 Other

**Ethnicity**

**Has a special need diagnosed by a professional?**

Yes  
 No

**Comments/Notes**

**Record Options** ▾

- Save Record
- New Child
- View Folder
- Go To Search

**Assigned Programs** ▾

(New) YCOE Family Resourc...

- Program Access

**Record Save Checklist** ▾

Required Field Checks **✗**

- \*Intake Date
- \*Child's Name
- \*Child DOB

Field Validation Checks **✓**

**Form Logic Rules** ▾

If child has a special need diagnosed, display + require hidden fields





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# Workshop/Event Log

# 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 3Vent 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

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

Search Actions ▼

- ➕ New Workshop/Event
- ✕ Clear Search History
- 🔒 Program Access
- ↔ Create Referral



# 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** ▾

**Assigned Programs** ▾

**Record Save Checklist** ▾

Required Field Checks **✗**

- \*Event Name
- \*Is part of Scope of Work?
- \*Type

Field Validation Checks **✓**

**Form Logic Rules** ▾

Is Part of Scope of Work contains "Yes"





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# Classes & Terms

# Classes & Terms

Classes & Terms

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All Classes  New Class

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

View   Page  of 1



# Attendance

**Attendance**
Enroll Participant(s) 
Session Manager

View Today
<
>
**Jan 2022**

Show Unenrolled

First Name (A-Z) |

☰ SUN 2
☰ MON 3
✔ TUE 4
☰ WED 5
☰ THU 6
☰ FRI 7
☰ SAT 8

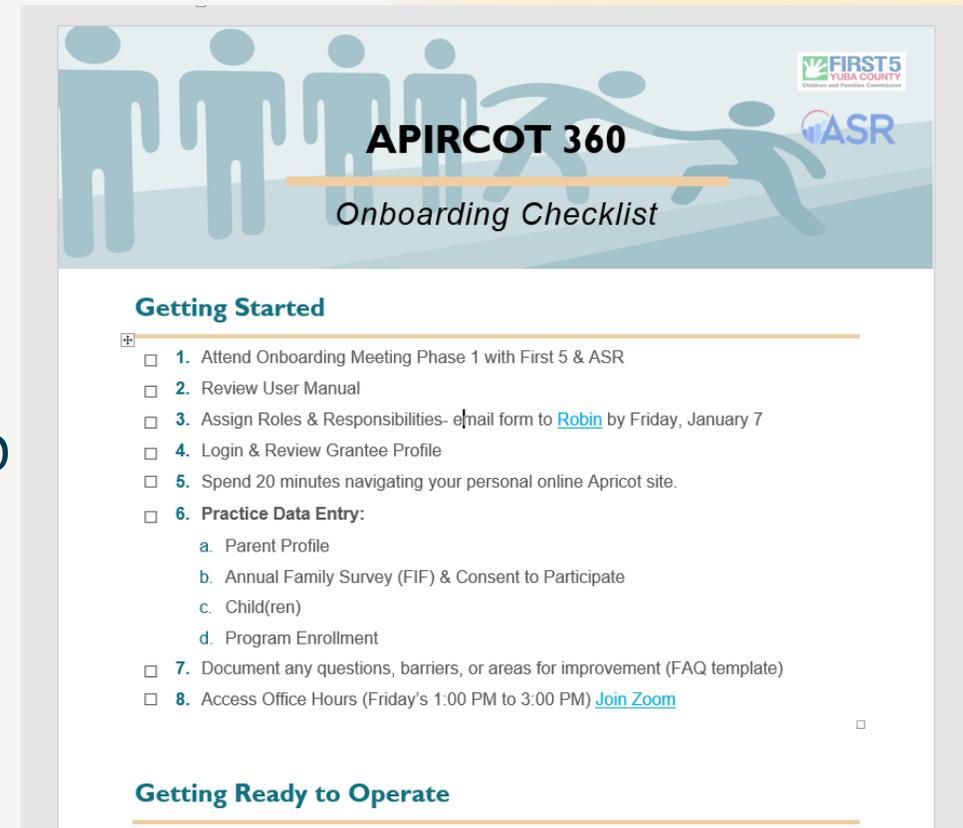
✔
✕

<b>Gigi Fake</b> 1978-08-29 <div style="float: right; text-align: right;"> </div>			<div style="background-color: #2e8b57; color: white; padding: 2px 5px; border-radius: 3px;">✔</div>				
<b>jane Fake</b> 2001-12-13 <div style="float: right; text-align: right;"> </div>			<div style="background-color: #2e8b57; color: white; padding: 2px 5px; border-radius: 3px;">✔</div>				
<b>George Fake</b> 1964-04-07 <div style="float: right; text-align: right;"> </div>			<div style="background-color: #2e8b57; color: white; padding: 2px 5px; border-radius: 3px;">✔</div>				



# Next Steps

- Assign **Roles & Responsibilities** – Due January 7, 2021  
Email Robin at [rtimoszyk@co.yuba.ca.us](mailto: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



**APIRCOT 360**  
*Onboarding Checklist*

**Getting Started**

- 1. Attend Onboarding Meeting Phase 1 with First 5 & ASR
- 2. Review User Manual
- 3. Assign Roles & Responsibilities- email form to [Robin](#) by Friday, January 7
- 4. Login & Review Grantee Profile
- 5. Spend 20 minutes navigating your personal online Apricot site.
- 6. **Practice Data Entry:**
  - a. Parent Profile
  - b. Annual Family Survey (FIF) & Consent to Participate
  - c. Child(ren)
  - d. Program Enrollment
- 7. Document any questions, barriers, or areas for improvement (FAQ template)
- 8. Access Office Hours (Friday's 1:00 PM to 3:00 PM) [Join Zoom](#)

**Getting Ready to Operate**



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

Robin S. Sharma

quotezancy

Thank you for joining us!  
We look forward to seeing you for the Phase 2 training.