



Apricot User Training: First 5 Yuba Strategic Partners Session 4: Apricot Connect & More



Onboarding Timeline

- **Phase 3 Invoicing and Contracts:** February 11th and following
- **Phase 4 Web Forms & Apricot Connect** – March 31st & following
- **Phase 5 Running Reports in Apricot** – TBD

Individualized Support is available now and will continue indefinitely



Training Logistics

Training will last about an hour

- Everyone learns at a different pace so patience will be key.
- Hands on activities are crucial to understanding the software. Please Participate!
- Reliable Internet Connection
- The most updated version of **Google Chrome** or **Mozilla Firefox**
- Don't be afraid to ask questions!



Robin
Timoszyk
Administrator

Learning Objectives

This training will cover:

- **Web Forms – When and How to Use**
- **Connect – When and How to Use**
- **Review – Progress Reports and Invoicing**



Important Reminders

When adding a parent/family to Apricot you must complete **ALL** of the following

- Parent Profile
- Program Enrollment
- Child Profile for all children 5 and under
- Annual FIF Survey and Consent (it is one form)



Secure Web Forms

What are Secure Web Forms

- Secure Web Forms allow users to create a link (URL) that provides direct access to a form.
- It allows individuals such as parents/caregivers to submit information without having to log into Apricot 360 or Apricot Connect.
- Data entered using a web form is automatically entered into Apricot



When to Use Web Forms

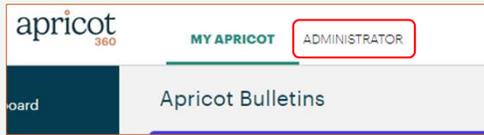
Use primarily with the following forms

- Parent Profile
- General Parent Support or Service Survey
- General Post Workshop Survey

Also with program specific forms, such as, the “Playzeum Event Satisfaction Survey”



How to Use Web Forms



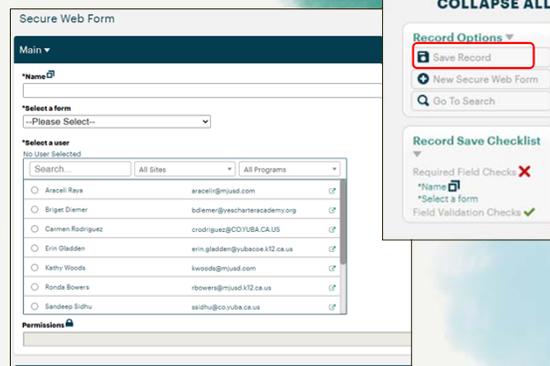
- Select Administrator tab
- Click External Access
- Click Secure Web Forms
- On the Right Palette select New Secure Web Form

EXPAND ALL



How to Use Web Forms

- Create a name for the URL
- Select the form from the Drop Down menu
- Select your user ID/email address
- Click the box next to your program name
- Review the Record Save Checklist –there a red **x** or Green **✓**?
- Click Save Record – This creates the URL



Secure Web Form

Main ▾

*Name

*Select a form
 --Please Select-- ▾

*Select a user
 No User Selected

Search...	All Sites	All Programs
<input type="radio"/>	Araceli Raza	araceli@msad.com
<input type="radio"/>	Birgit Diemer	bdiemer@veschtersacademy.org
<input type="radio"/>	Carman Rodriguez	crodriguez@COYUBA.CA.US
<input type="radio"/>	Erin Olsden	erin_olsden@yubacoe.k12.ca.us
<input type="radio"/>	Kathy Woods	kwoods@msad.com
<input type="radio"/>	Ronda Bowers	rbovers@moad.k12.ca.us
<input type="radio"/>	Sandeep Singh	ssdhu@co.yuba.ca.us

Permissions

COLLAPSE ALL

Record Options ▾

Save Record

New Secure Web Form

Go To Search

Record Save Checklist ▾

Required Field Checks **x**

*Name

*Select a form

Field Validation Checks **✓**



How to Use Web Forms

- Click Continue to see and access the link



The screenshot shows the 'URLs' section of the Apricot interface. It includes a 'Basic URL' field with a highlighted link: https://apricot.socialsolutions.com/auth/autologin/org_id/112270/hash/134fce0af77d9db7544300cfdb8704e7305064af. Below it is an 'Embed URL' field with a complex URL for embedding the form. To the right, there are sections for 'Assigned Programs', 'Record Save Checklist', and 'Last Saved'.

You may now copy the URL and use it with flyers, email, or convert to a QR code



Sample Web Forms

https://apricot.socialsolutions.com/document/edit/id/new/form_id/102

The flyer features the logos for YES Charter Academy and FIRST 5 YUBA COUNTY. The text reads: 'ABC Sprout Free school readiness and parent education programs. Nature based education for children ages 0-5 in collaboration with First Five Yuba. Beginning August 11 Tuesday, Wednesday, Thursday 8:30-11:30 am At YES Charter Academy'. It includes a QR code and a photo of hands holding a small tree. Contact information: 'FOR MORE DETAILS AND TO REGISTER CALL (530)692-2210 Or follow this link or scan the QR Code Below'.

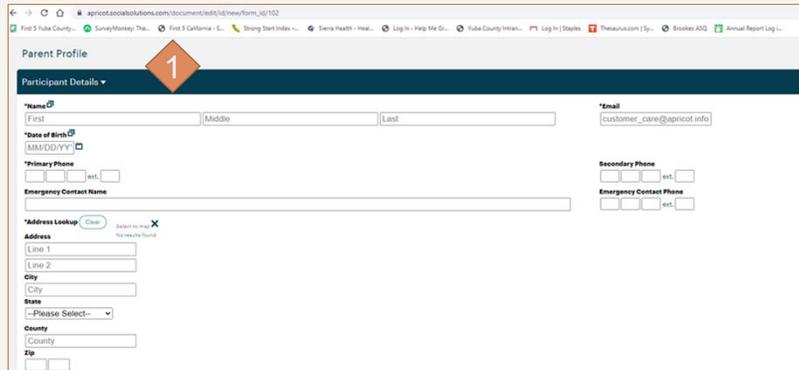
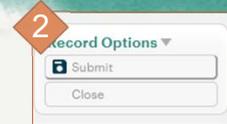
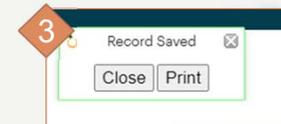
https://apricot.socialsolutions.com/auth/autologin/org_id/112270/hash/d7e79e8704e35233394ca05cda0c4cab19cfb358



What the Parent Sees

When the parent clicks on the link or scans the QR code the form will appear.

1. They complete the form
2. Click Submit
3. Then select Close or Print

Important Web Form Notes

1. Secure Web Forms can only be used to create new data.
2. Secure Web Forms can only be used with Primary forms such as Parent Profile or General Workshop Survey
3. Secure Web Forms allow a pre-existing form to accept submissions from outside of your Apricot.
4. Secure Web Forms will not allow a person to undo their submission.
5. Secure Web Forms will potentially show all Quick View items on a preexisting record in your system if the Duplicate Check Fields find a duplicate already in your system.

Hands-On Activity: Send a Web Form

1. Click the Administrator Tab on the top navigation area.
2. Select External Connect on the left navigation palette to expand.
3. Click "Secure Web Forms".
4. Complete the form. Review the Record Save Checklist.
5. Click "Save Record."



Apricot Connect

What is Apricot Connect?

A tool within Apricot that allows

- Direct messaging by email or text to one or more parent/client at a time.
- Can directly link forms (surveys, FIF, consent) from Apricot that will automatically link back to the family once completed.
- May also be used to send referrals to External Referral Partners such as WIC or Family SOUP – once their accounts are set up.

****A 2-way portal to connect with a family or parent using program tools, forms, surveys and resources while maintaining a comprehensive profile for each family you serve!**



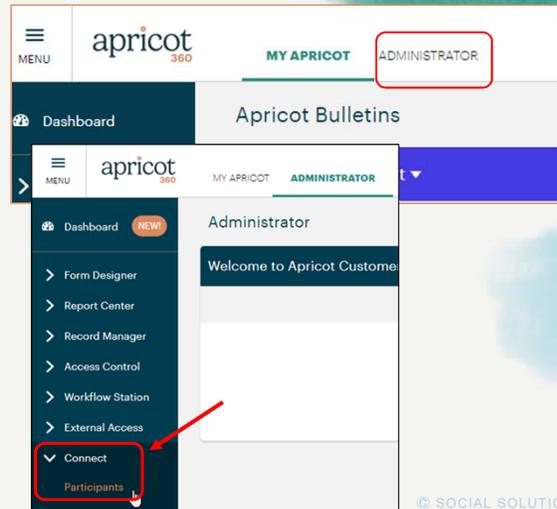
When to Use Connect

- Use for Annual FIF/Consent
- Adding or updating children
- Pre/Post Surveys
- Updating parent profiles
- Send group message regarding upcoming events, workshops, or share community resources
- Create or request appointments
- Attach calendar, flyers etc.



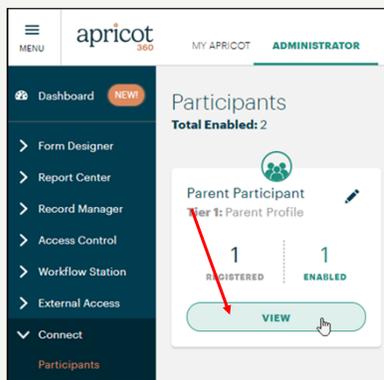
Step 1 – Enrolling Parents

- Select the “Administrator” tab at the top of the page
- Select “Connect” on the left palette
- Select “Participants”

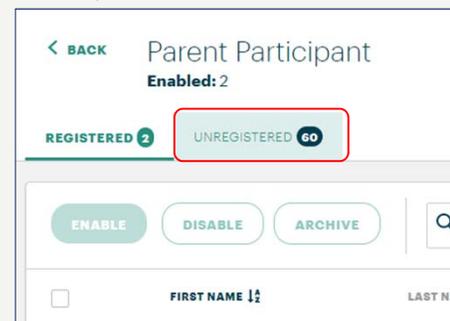


Enrolling Parents continued

- Under “Parent Participant” select “View”



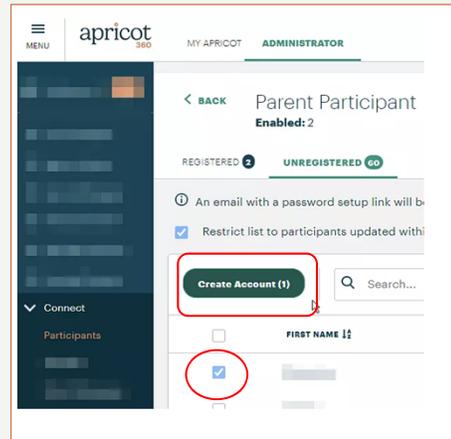
- Select the “Unregistered” tab



Enrolling Parents continued

- Select the checkbox next to the Parent Profile you wish to register
- Select Create Account

NOTE: You can select multiple participants at one time

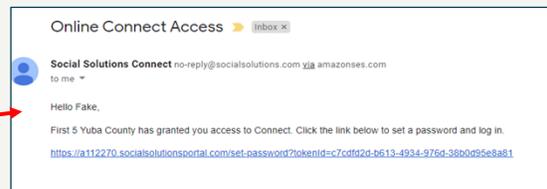


Enrolling Parents continued

- Once you have clicked "Create Account", You will see the Account Creation notice

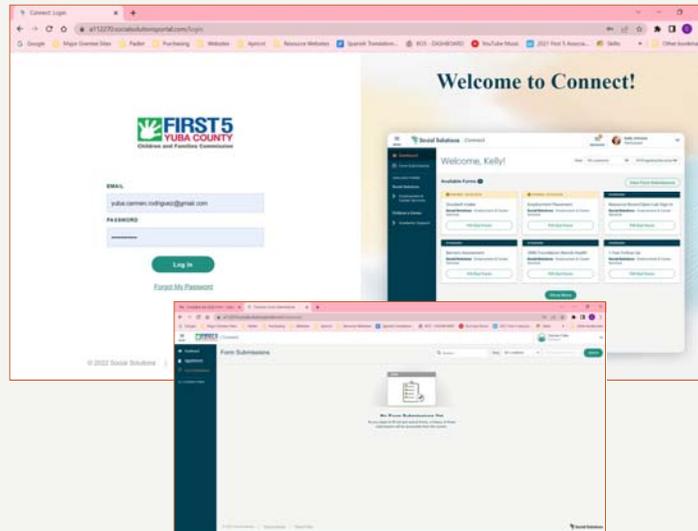


- An email is automatically sent to the parent requesting them to complete registration
- Parents will receive an email like this one from First 5 Yuba

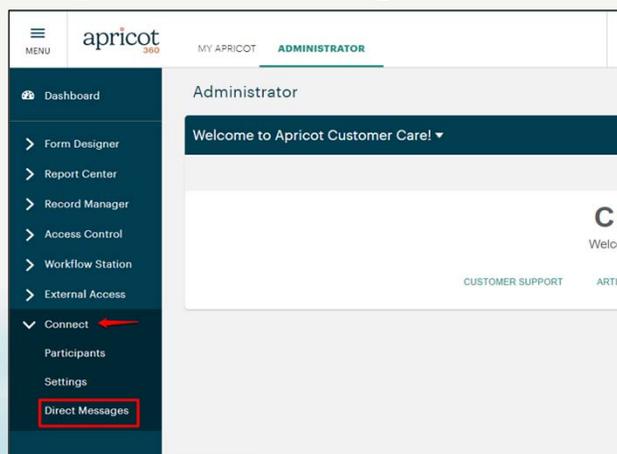


Enrolling Parents continued

- Parents have the option to create a password and have access to a connect portal, but do not have to.
- They will be able to receive emails or sms/text messages either way.



Step 2 -Sending a Form Using Connect



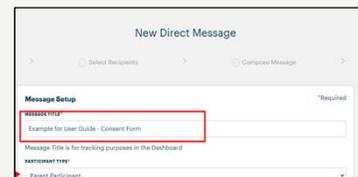
- To send a form to a Parent via Direct Message, navigate to the Administrator side of Apricot
- Select "Connect" on the left side of the screen
- Click "Direct Messages."

Sending a Form Continued

- From the Direct Messages dashboard, select "NEW DIRECT MESSAGE" on the far right:



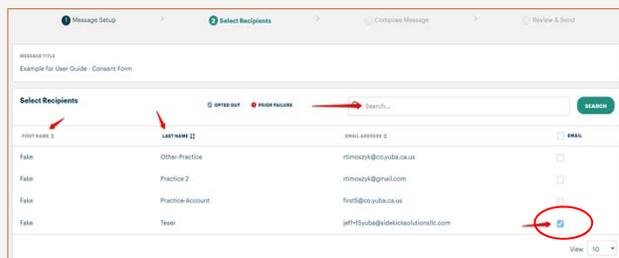
- Message Setup:** First enter the message title - this is an internal title (not the email subject) and does not appear for the Parent. Configure this title to make the most sense to your Apricot administrators.
- Select Participant Type, in this example, we will select Parent Participant



- Click next at the bottom of the screen to move to the next step:



Sending a Form Continued



First Name	Last Name	Email Address	Email
Fake	Other-Practice	rtimozz@booyba.ca.us	<input type="checkbox"/>
Fake	Practice 2	rtimozz@gmail.com	<input type="checkbox"/>
Fake	Practice Account	fvtd@oyuba.ca.us	<input type="checkbox"/>
Fake	Taser	jffh@yuba@sidekickssolutions.com	<input checked="" type="checkbox"/>

- Select Recipients:** click the box to the right of the email address or phone for SMS/Text (you can select both)
- Select Next at the bottom of the page



Sending a Form Continued

1. Add your email in "Reply To"
2. Compose the message, including Subject
3. Select form, *if applicable*
4. Select your Program

Select Next at the bottom of the screen



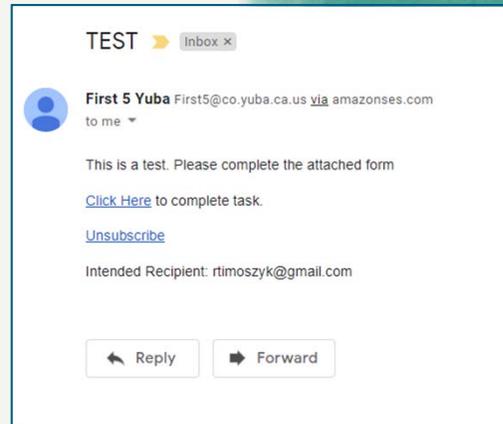
Sending a Form Continued

- Review your message
- Send



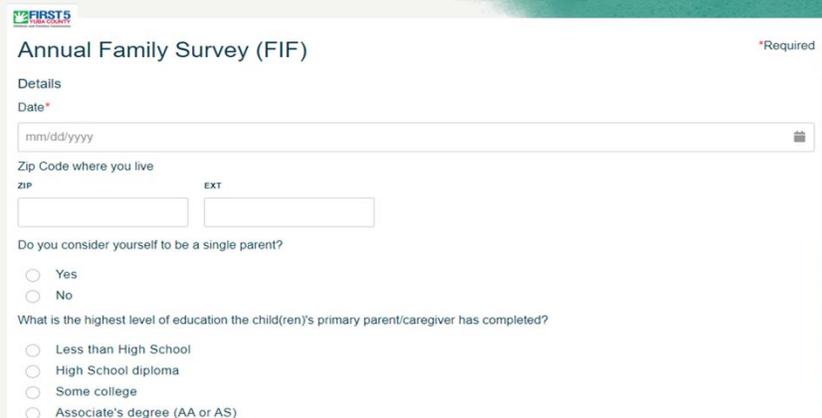
What Recipient Sees

- The parent will receive an email from First 5 Yuba with a link to the form



Recipient View continued

- Clicking the link opens a form.
- Once completed, the form automatically goes to the family's Apricot folder.




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Recipient View in Connect Portal

- Dashboard shows available forms
- Clicking “FILL OUT” opens a form.
- Once completed, the form automatically goes to the family’s Apricot folder.

The screenshot shows the 'Connect' portal interface. On the left is a dark sidebar menu with options: Dashboard, Appointments, Form Submitters, and ALL ASSIGNED FORMS (with a sub-option for ABC Sprout). The main content area displays a 'Welcome, Fake!' message and a section titled 'Available Forms'. This section lists two forms: 'Annual Family Survey (FF)' and 'Child Upload File', both associated with 'Yuba Environmental Science Charter Academy - ABC Sprout'. Each form has a 'FILL OUT' button. At the top right, there's a user profile for 'Fake Faker' with a 'Request Appointment' button. Below the forms, there are 'Cancel' and 'Save' buttons.

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Hands-On Activity: Send a Direct Message

1. Click the Administrator Tab.
2. Click Connect on the left palette.
3. Click Direct Message.
4. Select New Direct Message
5. Complete Message Setup.
6. Select Recipients.
7. Compose your message.
8. Review and Send*

* **Only** click Send if your practice message is being sent to your *personal or work email*.





Using Connect for External Referrals

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External Referrals & Connect



Connect may also be used to send referrals to External (not First 5 Yuba funded) programs.

- Start by navigating to the Parent Profile's Document Folder
- From the Parent's Document folder, click the "+" icon from the far right next to Referral Log:



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External Referrals Continued

- This form allows you to search for existing organizations via a directory. To access the directory, click "+Add" and see the existing organization profiles via a search window.
- Select any of the organizations to continue. When finished, click the top right "x" to close the search window
- Click "save record" when complete.
- If referral organization is tagged as Eligible to receive External Referrals via Apricot 360 Connect, a new field will appear:

Referral Log

Test Faker

Quick View Information

Details

*Select associated Program Enrollment
 (Selects Program A 11090001) [Go To Record](#) If you don't see a Program Enrollment for this Referral, please navigate back to it

*Referral Date
 MM/DD/YYYY

*Program making referral
 Please Select

*Referral Type
 Please Select

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



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External Referrals & Connect

Referral Organization (optional) Hide Deactivated Links [+ Add](#)

Links to be Added Upon Save

First 5 Yuba ✕

Referral Organization Name

First 5 Yuba

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

Reason for referral

Notes

The Referral Organization selected above is eligible to receive External Referrals via Apricot 360 Connect. You may optionally select to send an External Referral using the feature below.

*Would you like to send an External Referral via Apricot 360 Connect?
 Yes
 No



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External Referrals & Connect

Selecting "Yes" under "Would you like to send an External Referral via Apricot 360 Connect?" prompts the User to select "Save Record" on the right "Record Options" pallet.

*Would you like to send an External Referral via Apricot 360 Connect?

Yes
 No

Send an External Referral via Connect ▾

Select Save Record and then Continue to send an External Referral

- The "Send an External Referral via Connect" section will display once the record is saved. Users should follow the instructions visible on the screen

Send an External Referral via Connect ▾

Instructions:

- Select Add, to open search dialog
- Search for the Partner
- Select "new" next to the Partner, a new tab will open to create an External Referral
- Log and Save the External Referral
- Close the tab to navigate back to this page

Select Add, and then New to send an External Referral

Hide Deactivated Hide

External Referrals & Connect

- Select "+Add" to open the "External Connect Referral Search" window, then click "(new)" to enter the External Referral.
- When "new" is selected, the external Connect Referral screen will open.

External Connect Referral Search Link All Clear History ×

-- Add Search Field -- ▼ Browse All

The following 3 Referral Organization Profile records are available

			Organization	Status	Category
▶	1	(new)	First 5 Yuba	Active	
		(new)	First 5 Yuba - Program B	Active	Child Development, Preschool, & Early Learning Parent Support
▶	1	(new)	Sidekick Solutions	Active	Tech/Software

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External Referrals & Connect

- Complete all required fields (refer to record save checklist on the far right), then click “save record” on the top right.

External Connect Referral

First 5 Yuba
Quick View Information >

Details

Referral Information (Completed by Referring Organization)

***Referral Date**
MM/DD/YYYY

***Participant/Client Information**
Name, contact information, notes

***Reason for Referral**
Notes

***Referral from**
Your name, contact information

Attach Doc
Choose File No file chosen
Up to 25 MB

COLLAPSE ALL

Record Checklist

- Save Record
- View Submitted Records
- View Folder
- Go To Search

Assigned Programs

- Program Access

Record Save Checklist

- Required Field Check
- Referral Date
- Participant/Client Informa...
- Reason for Referral
- Referral from
- File Upload/Attach



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Quarterly Progress Reports & Invoices

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FIRST5 YUBA COUNTY
 Behavioral and Family Connections
 ASR

Progress Reporting

All Documents	
+ Contract (1 record)	
+ Annual Budget (1 record)	
+ Quarterly Report (0 records)	Each quarter
+ Success Story (0 records)	At least once per year
+ Invoice (1 record)	
+ Notes (0 records)	
+ File Upload (0 records)	Optional

- Required of all Strategic Partners
- Some forms are universal
- Others are specific to the program's evaluation plan

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APRICOT USER TRAINING

FIRST5 YUBA COUNTY
 Behavioral and Family Connections
 ASR

Quarterly Progress Reporting

Some examples of tailored forms



All Documents
+ Contract (1 record)
+ Annual Budget (1 record)
+ Child Care Planning Council Performance Measure Report (0 records)
+ Happy Toothmobile (MJUSD Dental Services) Quarterly PM Report (0 records)
+ Yuba County Library Performance Measure Report (0 records)
+ Quarterly Report (0 records)
+ Client Success Story (0 records)
+ Demographic Reporting (0 records)
+ Invoice (2 records)
+ Notes (0 records)
+ File Upload (0 records)

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Invoicing

1. Click View Folder.
2. Expand the Invoice folder to see the submitted invoice.
3. Once submitted, the invoice appears in a report for First 5 staff. Staff will review and process as usual.

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

2 Invoice (2 records)

STATUS	INVOICE DATE
Submitted	02/08/2022
Approved	10/21/2021

3 Invoices to Review

Invoice to review
 Report last run February 9th 2022, 9:54 am
 Click to refresh data

Displaying 1 of 1 Rows (Expand All Cells)

Organization Name	Vendor Code/Number	Contract No.	Fiscal Year	Invoice Date	Grantee Invoice/Reference Number
Playzeum Yuba Sutter	SP22-103	SP22-103	FY21-22	02/09/2022	Practice

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Invoice

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

DOCUMENT FOLDER CENSUS LINKS APPOINTMENTS

All Documents

- + Contract (1 record)
- + Annual Budget (1 record)
- + Quarterly Report (0 records)
- + Client Success Story (0 records)
- + Invoice (1 record) + 
- + Notes (0 records)
- + File Upload (0 records)

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Invoice

- Complete the form (required fields are marked with an asterisk (*))

INVOICE

Playzeum Yuba Sutter

Quick View Information ▶

Status ▶

Details ▼

***Invoice Date**
10/21/2021

Grantee Invoice/Reference Number
FY21-22 Q1

Record ID
2621

Created By
Robin Timoszyk

***Select Contract**
Creative Arts Play Groups SP22-103 Go To Record

***Annual Budget**
FY21-22 Go To Record

Guidance on budget spend down in the sections below is exclusive to "Approved" invoices only. Submitted invoices that are in review by our team are included in the sum of budget spent in each category.

Definitions:
- Annual Budget: The amount allocated in your Annual Budget to a specific category.

Best Practice: Indicate the reporting period in the Grantee Invoice/Reference Number field



Invoice

- Once you select a budget year, additional fields appear.
- In the far left column, enter the **total** amount for each line.

Amounts ▼

A. Salaries and Benefits	Management Salaries: Annual Budget	Management Salaries: Approved to Date	Management Salaries: Amount Remaining in Budget
Management Salaries \$1,000.00	\$9,600.00	2400.00 Update	7200
Program/Project Salaries \$1,000.00	Program/Project Salaries: Annual Budget \$16,900.00	Program/Project Salaries: Approved to Date 4225.00 Update	Program/Project Salaries: Amount Remaining in Budget 15795.35
Administrative Salaries \$1,000.00	Administrative Salaries: Annual Budget \$0.00	Administrative Salaries: Approved to Date 0.00 Update	Administrative Salaries: Amount Remaining in Budget 0

NOTE: Each Partner's July – September 2021 Invoice has already been entered.



Invoice

1. Once you have entered all the amounts, ensure the total matches your numbers.
2. Attach the backup documents you normally provide with your invoice.
3. Review the Record Save Checklist (no red X)
4. On the Record Options palette, select Save Record

Indirect Expenses
\$1,000.00

Total Invoice Amount
1

Attachment
2 Choose File No file chosen
Up to 25 MB

Record Options

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

Assigned Programs

- (New) Playgroups and Crea...
- Program Access

Record Save Checklist

- Required Field Checks ✓
- Field Validation Checks ✓



Invoicing –

It was declined! Now what???

1. An email will be sent with an explanation of why the invoice was declined and how to remedy the situation.*
2. You will submit a *new* invoice with “correction” or “update” in the invoice/reference field
3. Staff will review and process as usual.

**Make sure Robin has your fiscal contact's email*

Invoice (2 records)

STATUS	INVOICE DATE
Approved	10/19/2021
Declined	01/10/2022

1

Status

- Record Lock: Locked
- *Status:
 - Submitted
 - Approved
 - Declined
- *Date of Status Determination: 02/10/2022
- *Reason for decline: Back up documentation missing

2

***Invoice Date**
02/10/2022

Grantee Invoice/Reference Number
FY21/22 Q2 Correction





APRICOT USER TRAINING




Onboarding Checklist

1. Strategic Partner Agencies that complete and turn in the checklist will earn a \$100 Amazon gift card for their program.
2. Complete and submit to Carmen (crodriguez@co.yuba.ca.us) by Friday 4/29/2022



APIRCOT 360
Onboarding Checklist

Getting Started

<input type="checkbox"/>	1. Attend Onboarding Meeting Phase 1 with First 5 & ASR
<input type="checkbox"/>	2. Review User Guide
<input type="checkbox"/>	3. Assign Roles & Responsibilities- email form to Robin by Friday, January 7
<input type="checkbox"/>	4. Login & Review Grantee Profile
<input type="checkbox"/>	5. Spend 20 minutes navigating your personal online Apricot site.
<input type="checkbox"/>	6. Practice Data Entry (if applicable):
	a. Parent Profile
	b. Annual Family Survey (FIF) & Consent to Participate
	c. Child(ren)
	d. Program Enrollment
<input type="checkbox"/>	7. Document any questions, barriers, or areas for improvement (FAQ template)

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Thank you for joining us!