



# Apricot Software User Guide

How to navigate and complete data entry tasks in the First 5 Yuba County Apricot system

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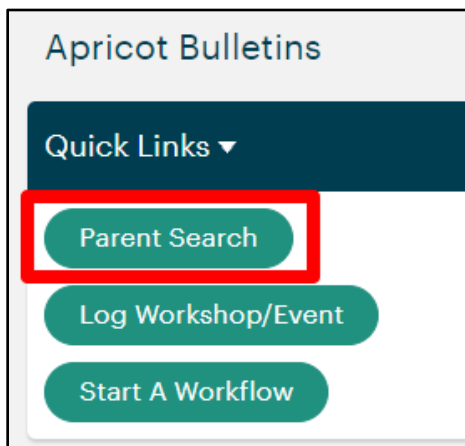
This guide describes general system navigation and data entry for First 5 Yuba County's Apricot 360 database. Quick links to the sections of this guide are provided below. Use CTRL + F to search for specific phrases.

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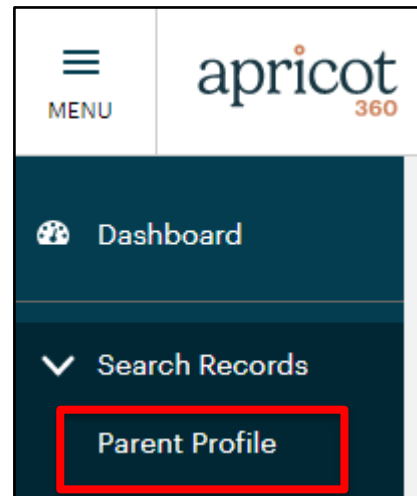
# How to search and create a Parent Profile

The Parent Profile is the face sheet that contains the parent's name along with other identifying and contact information. Once a Parent Profile is created, a document folder allows users to capture the history of all services for the parent over time. There should only be one profile for each parent in the system, even if the parent is served by multiple programs.

- 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.



- You will find **Parent Search** under either **Search Records** or **Quick Links**



- 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 Date of Birth).

**Parent Profile**

**Parent Profile Search**

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

The following 9 Parent Profile records are available

Name ▾	Date of Birth ▾
Jeff Fake	10/29/2021
Test Faker	11/03/2021
Fake Other-Practice	10/28/1932
Fake A Practice 2	02/01/2000
Fake Practice-Account	10/25/1997
Test Record	10/10/1979
Fake Teser	01/01/1980
Jeff Test	10/13/2021
Test Test	10/12/2021

- In the below 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

Parent Profile Search

-- Add Search Field -- Browse All

Name (Parent Profile) Clear Field

test Middle Last

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.

- If no match is found, click the **New Parent Profile** button on the Search Actions menu (to the right of the search screen)

Search Actions

+ New Parent Profile

X Clear Search History

Program Access

Create Referral

- Fill out the Parent Profile while paying attention to the following:

Parent Profile

Participant Details

\*Name First Middle Last

\*Date of Birth MM/DD/YYYY

\*Primary Phone ext.

Social Security Number

Emergency Contact Name

\*Address Lookup Clear Select to map No results found

Address Line 1 Line 2 City State

Email customer\_care@apricot.info

Secondary Phone ext.

Drivers License Number

Emergency Contact Phone ext.

COLLAPSE ALL

Record Save Checklist

Required Field Checks

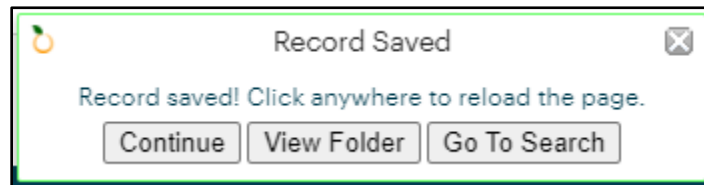
- \*Name
- \*Date of Birth
- \*Primary Phone
- \*Address Lookup
- \*Number of Children
- \*Your relationship to your ...
- \*How did you hear about the ...
- \*Race
- \*Ethnicity
- \*Gender Identity
- \*Marital Status
- \*Primary Language

Field Validation Checks

- **Duplicate Checks:** The double square symbol indicates this field is used to check for duplicates. If you try to add a Parent that already has a profile in Apricot, the system will give

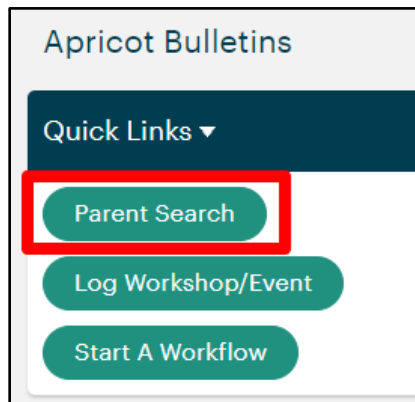
you a warning and prevent you from adding the duplicate. This message appears as soon as you complete all fields that are used for duplicate checks.

- **Required Fields:** An asterisk next to a question indicates that it is required. The form cannot be saved until all required fields are complete. Also see the Record Save Checklist (on the right hand side menu) to see a list of all remaining required fields.
    - The parent DOB is one of the required fields. If you do not know the DOB please enter 01/01/1900
    - The parent email address is a required field. If you do not know the parent email please enter [fake@gmail.com](mailto:fake@gmail.com) until you get the information from the parent
  - **Save the form:** To save the information entered in the form, click the Save Record button before moving away from the screen. Find the Save Record button on the Record Options menu on the right hand side of the screen.
- When you save any record in Apricot successfully, you will see a “Record Saved” pop up with three options: **Continue** (to stay on the current page), **View Folder** (will take you to the Parent's Document Folder), and **Go To Search** (will take you back to the search Parents screen).



# How to search and edit a Parent Profile

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



- 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.
- In the below 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.

A screenshot of the 'Parent Profile Search' results page. At the top, there's a header 'Parent Profile' and a sub-header 'Parent Profile Search'. Below this is a search bar with a dropdown menu set to '-- Add Search Field --' and a 'Browse All' link. The search criteria is 'Name (Parent Profile)' with a 'Clear Field' link. The search results show three records: 'Test Faker', 'Test Record', and 'Test Test'. The 'Name' column is highlighted in a darker shade of green, and the 'Date of Birth' column is gray. A red arrow points to the 'Name' column header. A red 'x' icon is visible in the top right corner of the search results area. Below the table, there is a note: '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.'

- Notice how the field searched by (in this example, name) turns a darker shade of green, and date of birth field stays gray. To edit the Parent profile, click on the green text (their name).

Parent Profile

Parent Profile Search

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

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

test Middle Last

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.

- NOTE: If you click on gray text by mistake and see the Document Folder (looks like the below screen), that's OK, simply click the edit button on the top right to edit the Parent's profile.

Test Faker

[Edit](#) [Create](#) [Print](#)

[Quick View Information](#)

DOCUMENT FOLDER CENSUS LINKS APPOINTMENTS

All Documents

☐ Expand Multiline

- Once you are viewing the Parent profile, you can make edits. When you're finished, be sure to click "Save Record" on the far right for the edits to be saved in Apricot.

**Record Options**

[Save Record](#)

[Print Mode](#)

[Archive Record](#)

[View History](#)

[New Parent Profile](#)

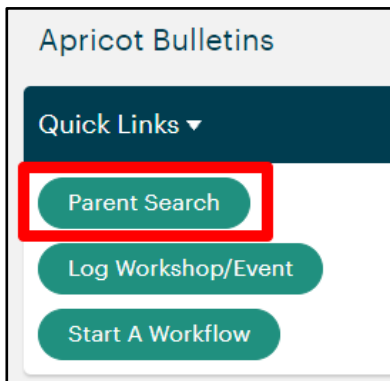
[View Folder](#)

[Go To Search](#)

- When you save any record in Apricot successfully, you will see a "Record Saved" pop up with three options: **Continue** (to stay on the current page), **View Folder** (will take you to the Parent's Document Folder), and **Go To Search** (will take you back to the search Parents screen).

# How to search and open a Parent's folder

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



- 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.
- In the below 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.

A screenshot of the 'Parent Profile Search' results page. The page has a dark blue header with 'Parent Profile Search'. Below the header is a search bar with a dropdown menu labeled '-- Add Search Field --' and a 'Browse All' link. The search bar contains the text 'Name (Parent Profile) Clear Field' and 'test'. Below the search bar is a table with 3 columns: 'Name', 'Date of Birth', and 'Action'. The table contains 3 rows of data: 'Test Faker', 'Test Record', and 'Test Test'. The 'Name' column is highlighted in a darker shade of green, and the 'Date of Birth' column is gray. A red arrow points to the 'Name' column header, and another red arrow points to the 'Test Faker' row. A red 'x' icon is visible in the top right corner of the search bar area. Below the table, there is a note: '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.'

- Notice how the field searched by (in this example, name) turns a darker shade of green, and date of birth field stays gray. To view the Parents Document Folder, click on the gray text (in this example, their date of birth).



## Parent Profile

### Parent Profile Search

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

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

test Middle Last

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.

- NOTE: If you go to their profile by mistake and see the profile screen (looks like the below screen), that's OK, simply click "View Folder" from the Record Options palette on the right side of the screen:

## Parent Profile

### Participant Details

**\*Name**  
Test Middle Faker

**\*Date of Birth**  
11/03/2021

**\*Primary Phone**  
333 333 3333 ext.

**Social Security Number**

**Emergency Contact Name**

**Email**  
jeff+fakeyuba@sidekicksolutionllc.com [Change](#)

**Secondary Phone**  
 ext.

**Drivers License Number**

**Emergency Contact Phone**  
 ext.

**Record Options**

- Save Record
- Print Mode
- Archive Record
- View History
- New Parent Profile
- View Folder**
- Go To Search

**Assigned Programs**

- Intake
- Program Access

- Once you have arrived at the Parent's Document Folder, the screen will look like this:

## Test Faker

[Edit](#) [Create](#) [Print](#)

[Quick View Information](#)

**DOCUMENT FOLDER** [CENSUS](#) [LINKS](#) [APPOINTMENTS](#)

All Documents [Expand Multiline](#)

- Consent to Participate (0 records)
- Annual Family Survey (FIF) (0 records)
- Child (0 records)
- Program Enrollment (0 records)
- Service Log (0 records)
- Referral Log (0 records)
- Screening Log (0 records)

# How to Complete a Child Record

- From the Parent's Document folder, click the "+" icon to the far right of Child
- Note: 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.

**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**

- Enter the required information,
- If, "Has a special need..." is answered, "Yes", additional fields will appear which require a response.

**Has a special need diagnosed by a professional?**  
☒ Yes  
☐ No

**\*Please specify diagnosis.**  
  
This field is required.

**\*Is receiving professional help for a special need?**  
☐ Yes  
☒ No  
This field is required.

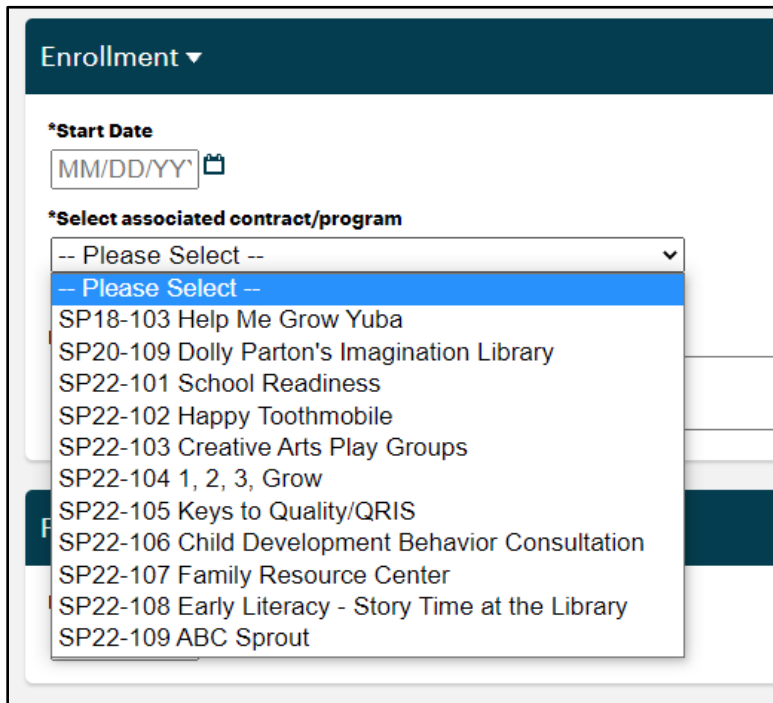
**Comments/Notes**

- Once all required information is entered, select Save Record from the Record Options menu on the far right

Repeat as needed to add all children in the family under the age of six (6).

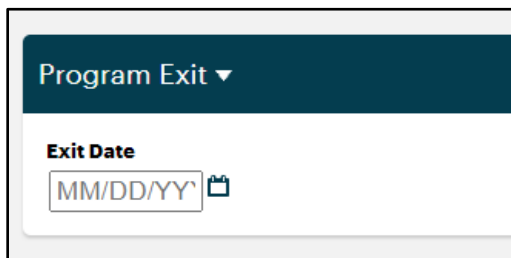
# How to Enter a Program Enrollment

- From the Parent's Document folder, click the "+" icon on the far right of Program Enrollment.
- Enter the Start Date.
- Select the appropriate program from the drop down menu.



The screenshot shows a form titled "Enrollment" with a dropdown arrow. Below the title, there is a field for "\*Start Date" with a date input box showing "MM/DD/YY" and a calendar icon. Below that is a field for "\*Select associated contract/program" with a dropdown menu. The dropdown menu is open, showing a list of programs: "-- Please Select --", "SP18-103 Help Me Grow Yuba", "SP20-109 Dolly Parton's Imagination Library", "SP22-101 School Readiness", "SP22-102 Happy Toothmobile", "SP22-103 Creative Arts Play Groups", "SP22-104 1, 2, 3, Grow", "SP22-105 Keys to Quality/QRIS", "SP22-106 Child Development Behavior Consultation", "SP22-107 Family Resource Center", "SP22-108 Early Literacy - Story Time at the Library", and "SP22-109 ABC Sprout".

- DO NOT ENTER PROGRAM EXIT AT THIS TIME. For information on ending enrollment see the section on "How to End Program Enrollment".



The screenshot shows a form titled "Program Exit" with a dropdown arrow. Below the title, there is a field for "Exit Date" with a date input box showing "MM/DD/YY" and a calendar icon.

- Select Save Record from the Record Options menu on the far right.

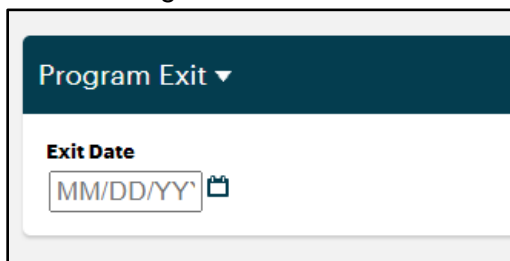
# How to End a Program Enrollment

- From the Parent's Document folder, click the "+" icon to the left of the Program Enrollment. This will expand the subfolder allowing you to see all the active program enrollments under your permission set.
- Click the program to end enrollment

## Program Enrollment (3 records)


START DATE	SELECT ASSOCIATED CONTRACT/PROGRAM
12/14/2021	SP20-109 Dolly Parton's Imagination Library
12/13/2021	SP20-109 Dolly Parton's Imagination Library
12/13/2021	SP18-103 Help Me Grow Yuba

- Navigate to the Program Exit section

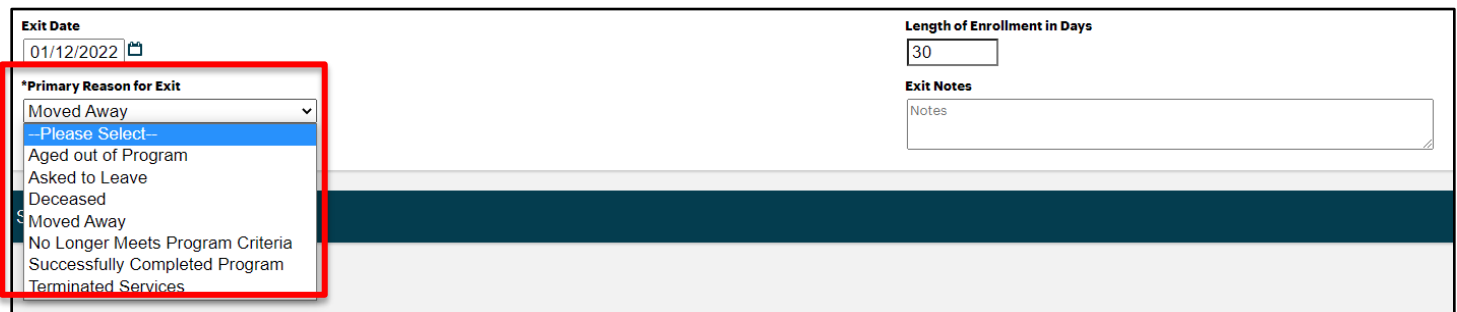



Program Exit ▼

Exit Date

MM/DD/YY 

- Enter an exit date. Once selected additional fields will appear
- Select the Primary reason for exit from the drop down menu



Exit Date  
01/12/2022 

\*Primary Reason for Exit

- Moved Away
- Please Select--
- Aged out of Program
- Asked to Leave
- Deceased
- Moved Away
- No Longer Meets Program Criteria
- Successfully Completed Program
- Terminated Services

Length of Enrollment in Days  
30

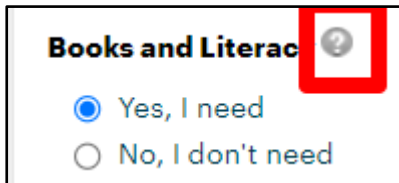
Exit Notes  
Notes

- Add any relevant exit notes
- Select Save Record under Record Options at the far right

# How to complete an Annual Family Survey (FIF) & Consent to Participate

The Annual Family Survey & Consent is a combined form used when enrolling a new family in services and annually with returning families. The FIF can be completed in one of several ways:

1. As part of a workflow
2. Entered manually after the family has completed a paper version of the form
3. Entered directly by the parent through “Connect.” – Instructions follow
  - a. Notice this form contains fields with Hints - to see the hint, hover your mouse over the question mark icon:



**Books and Literacy** ⓘ

☒ Yes, I need

☐ No, I don't need

- From the Parent's Document folder, click the “+” icon from the far right next to Annual Family Survey



All Documents Board Multiline Search Forms

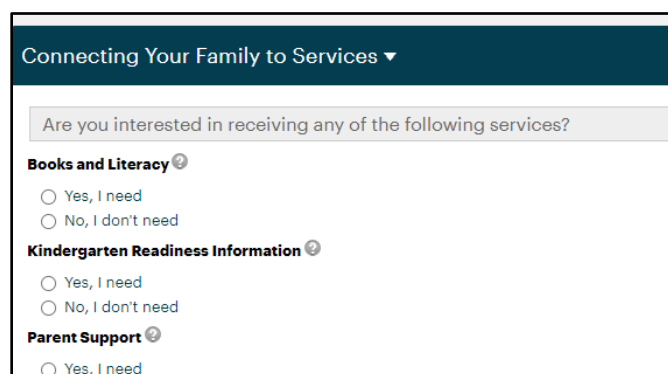
Annual Family Survey (FIF) (1 record)

DATE

01/16/2022

- Complete form.

Note: Several questions on the FIF are repeated from the Parent Profile. Because the profile will be on file for several years, the FIF will catch a change in those items over time (such as an increase in income, change in employment status, etc.)



**Connecting Your Family to Services** ▼

Are you interested in receiving any of the following services?

**Books and Literacy** ⓘ

☐ Yes, I need

☐ No, I don't need

**Kindergarten Readiness Information** ⓘ

☐ Yes, I need

☐ No, I don't need

**Parent Support** ⓘ

☐ Yes, I need

- Click “Save Record” from the Record Options Menu

**BEST PRACTICE:** If there is an existing Annual Family Survey on file, check the date. If the date is equal to or newer than July 1 of the current program year, you do not need a new one.

## To send the FIF directly to a family for completion follow these steps

- Follow the directions on How to Send a Survey/Form to a Parent in this guide
- When you get to “Compose Message” section find the “Form Linked” drop down

1 Message Setup > 2 Select Recipients > 3 Compose Message > 4 Review & Send

MESSAGE TITLE  
Example for User Guide - Consent Form

**Compose Message**

**FROM\***  
no-reply@socialsolutions.com

**REPLY TO\***

**EMAIL SUBJECT\***  
Consent Form from First 5 Yuba Enclosed - Action required

**EMAIL MESSAGE\***  
Greetings!  
We are looking forward to working with you. Please complete the link below to sign our consent form to participate in our program.  
Thanks,]

**FORM LINKED\***  
Consent to Participate

**PROGRAM ASSIGNMENT\***  
Intake

**FORM LINK EXPIRATION DATE\***  
mm/dd/yyyy

**ATTACH FILE(S) TO THIS MESSAGE...**  
SELECT FILE

- In the Form Linked Drop Down select Annual Family Survey

**FORM LINKED**

-- Select --

-- Select --

Annual Family Survey (FIF)

Child

Program Enrollment

Service Log

- Select Next at the bottom right of the screen
- Review the message
- Select Send at the bottom right of the screen

Note: You may send a form to one or more parents at a time

Note: The email is defaulted to show from First 5 Yuba. However, you should set your own email for the reply to address or your parents emails will come to First 5.

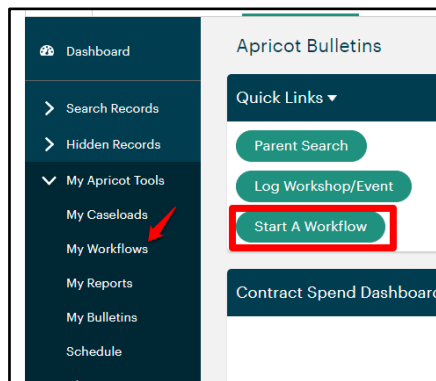
# How to complete Family Intake Workflow

Complete the Family Intake Workflow when enrolling a new family in services. The intake workflow guides users through completing the following tasks in Apricot:

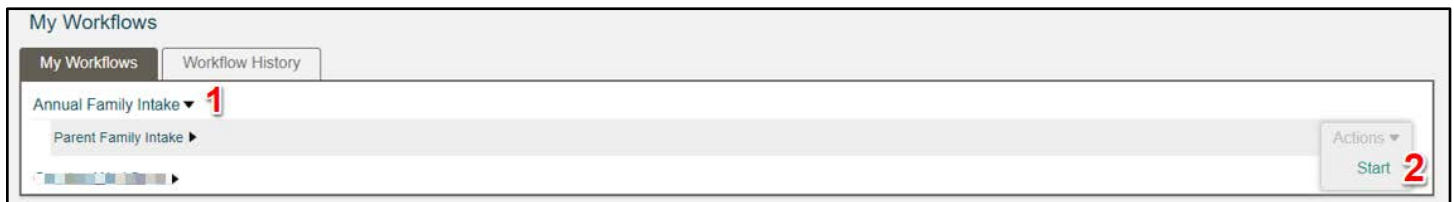
- Create or edit Parent Profile - Required
- Create Annual Family Survey (FIF) - Required
- Create Program Enrollment Record - Required
- Create or edit Child – 1 is Required, may add up to 4 records as part of the workflow

The intake workflow is a stepped procedure that navigates a user through each step of the intake sequence outlined above. However, you may also complete these steps individually, one at a time, from the Parent's document folder if preferred.

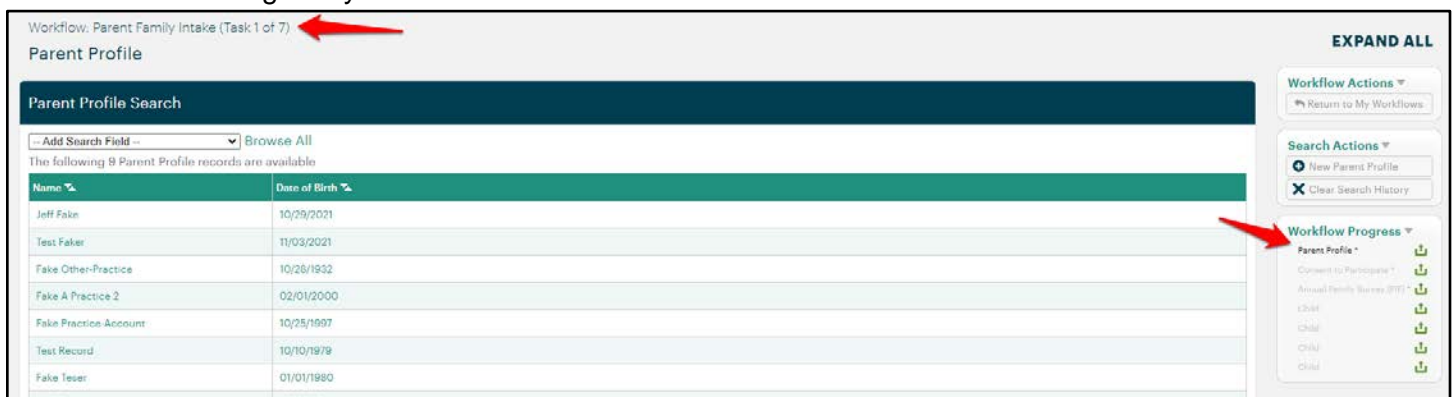
- From the home page, click Start A Workflow from the Quick Links bulletin - or click "My Apricot Tools" on the left navigation menu then "My Workflows"



- Once you have reached "My Workflows," hover your mouse over "Annual Family Intake," click the gray arrow, then hover your mouse over "Actions" and click "Start"



- Once started, you will see the number of tasks required at the top of your screen and the status of each task to the right of your screen.



1. The first task in this workflow sequence is to either select an existing Parent Profile, or create a new one. This task is complete when a Parent Profile is saved
  - a. Notice the Workflow Actions pallet on the far right, when complete, click “Save and Next”:

Workflow: Parent Family Intake (Task 1 of 7)

Parent Profile

**Participant Details**

\*Name    Email  [Change](#)

\*Date of Birth

\*Primary Phone    ext.

Secondary Phone    ext.

Social Security Number

Drivers License Number

Emergency Contact Name

Emergency Contact Phone    ext.

\*Address Lookup [Clear](#) [Select to map](#)

Address

**Workflow Actions**

Next Task

Save

Save and Next

Return to My Workflows

**Assigned Programs**

Intake

Program Access

**Record Save Checklist**

Required Field Checks ☒

Field Validation Checks ☒

**Form Logic Rules**

How did you hear about the program? contains Other

**Workflow Progress**

Parent Profile ☒

- b. Once you have completed task 1, you will see a new pop up that states “Workflow Task Complete.” Notice that the Workflow Progress now shows a checkmark for Parent Profile. To Navigate to the next task, Click “Next” from the pop up or “Next Task” from the Workflow actions palette.

Workflow: Parent Family Intake (Task 1 of 7)

Parent Profile

**Participant Details**

\*Name    Email  [Change](#)

\*Date of Birth

\*Primary Phone    ext.

Secondary Phone    ext.

Social Security Number

Drivers License Number

Emergency Contact Name

Emergency Contact Phone    ext.

\*Address Lookup [Clear](#) [Select to map](#)

Address

**Record Saved**

Workflow is complete.  
Click "Next" to complete any optional tasks.

[Continue](#) [Finish](#) [Next](#)

**Workflow Actions**

Next Task

Save

Save and Next

Return to My Workflows

**Assigned Programs**

Intake

Program Access

**Record Save Checklist**

Required Field Checks ☒

Field Validation Checks ☒

**Form Logic Rules**

How did you hear about the program? contains Other

**Workflow Progress**

Parent Profile ☒

2. The next task in this workflow is to complete an Annual Family Survey (FIF) record.
  - a. Notice this form contains fields with Hints - to see the hint, hover your mouse over the question mark icon:



Books and Literacy

☒ Yes, I need
 ☐ No, I don't need

- The next task in this workflow is to complete a program enrollment record. While the creation of a Program Enrollment record is the final required step in this workflow, you may also click “Next” to search and enter information about the Parent’s children.

Workflow: Parent Family Intake (Task 4 of 8)

Program Enrollment

Test Faker

Quick View Information

Enrollment

Workflow Complete!

Workflow is complete. Click "Next" to complete any optional tasks.

Previous Finish **Next**

Workflow Actions

Previous Task Save Save and Next Return to My Workflows

Workflow: Parent Family Intake (Task 5 of 8)

Child

Child Search

Test Faker

Quick View Information

Name

Test Faker

Date of Birth

11/03/2021

Click "new" if none exist

Click "new" if none exist

Child's Name (Child)

Clear Field

First Middle Last

Select a record to view or update

Child (0 record)

Child's Name

Intake Date

Child DOB

If children are already entered, they appear here

Enter up to 4

Workflow Actions

Previous Task Next Task Return to My Workflows

Search Actions

New Child Clear Search History

Workflow Progress

Parent Profile \*

Consent to Participate \*

Annual Family Survey (FIF) \*

Child Enrollment \*

Child

Child

Child

- You may stop and go back to a workflow at any point in the process by clicking Workflow History from the My Workflow screen. Click “In Progress” to pick up where you left off.

My Workflows

My Workflows Workflow History

Workflow Name

Last Modified by User

Date Started

Date Last Modified

Date Completed

Status

Parent Family Intake

Sidekick Solutions

11/29/2021 2:28 PM CST

11/29/2021 2:28 PM CST

In Progress

Parent Family Intake

Sidekick Solutions

11/29/2021 2:10 PM CST

11/29/2021 2:19 PM CST

11/29/2021 2:19 PM CST

Complete

# How to log a Service

- From the Parent's Document folder, click the "+" icon from the far right next to Service Log:

The screenshot shows the 'Test Faker' document folder interface. At the top, there are buttons for 'Edit', 'Create', and 'Print'. Below these is a 'Quick View Information' section. The main area is titled 'All Documents' and contains a list of document types: 'Consent to Participate (1 record)', 'Annual Family Survey (FIF) (1 record)', 'Child (0 records)', 'Program Enrollment (1 record)', and 'Service Log (0 records)'. Each entry has a '+' icon on the left and a document icon on the right. The 'Service Log' entry's document icon is highlighted with a red box.

- Notice this form requires you to select the Parent's Program Enrollment record in the first dropdown. If you don't see an option in this dropdown, please follow the instructions to the right of your screen.

The screenshot shows the 'Service Log' form for 'Test Faker'. The 'Details' section is expanded. The first field is '\*Select associated Program Enrollment' with a dropdown menu showing '-- Please Select --'. This field is highlighted with a red box. Below it is a red text message: 'This field is required'. To the right of the dropdown, a red arrow points to a text instruction: 'If you don't see a Program Enrollment for this Service, please navigate back to the Parent's document folder to enroll the Parent in services.' Below the dropdown are fields for '\*Service date' (MM/DD/YYYY), '\*Service type' (dropdown), and '\*Service provided to' (radio buttons for 'Parent/Caregiver' and 'Child(ren)'). At the bottom is a 'Notes' section with a text area.

- Complete the required fields and any notes related to the service, you believe are appropriate.
- Select Save Record from the Record Options menu on the far right.

The screenshot shows the 'Record Options' menu. It contains four options: 'Save Record' (highlighted), 'New Service Log', 'View Folder', and 'Go To Search'.

## How to log a Screening

- From the Parent's Document folder, click the "+" icon from the far right next to Screening Log:

The screenshot displays the 'Test Faker' application interface. At the top, there are buttons for 'Edit', 'Create', and 'Print'. Below these, there's a 'Quick View Information' section. The main content area is titled 'All Documents' and includes a search bar and an 'Expand Multiline' checkbox. A list of documents is shown, each with a plus icon on the left and a document icon with a pin icon on the right. The 'Screening Log (0 records)' entry is highlighted with a red box around its document icon.

- Notice this form requires you to select the Parent's Program Enrollment record in the first dropdown. If you don't see an option in this dropdown, please follow the instructions to the right of your screen.
- This form also requires you to select which child this screening is for. If you do not see the correct child in the dropdown, you will need to enter the child in the Parent's Document folder before you can complete this form.
- Notice the "Result Required?" field changes based on the Screening Type selected. Some additional fields may be revealed based on Screening Type selected (example for ASQ-3 shown below).

## Screening Log

### Test Faker

Quick View Information ▶

Details ▾

\*Select an associated Program Enrollment  
-- Please Select -- ▾

\*Date  
 📅

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

\*Screening type

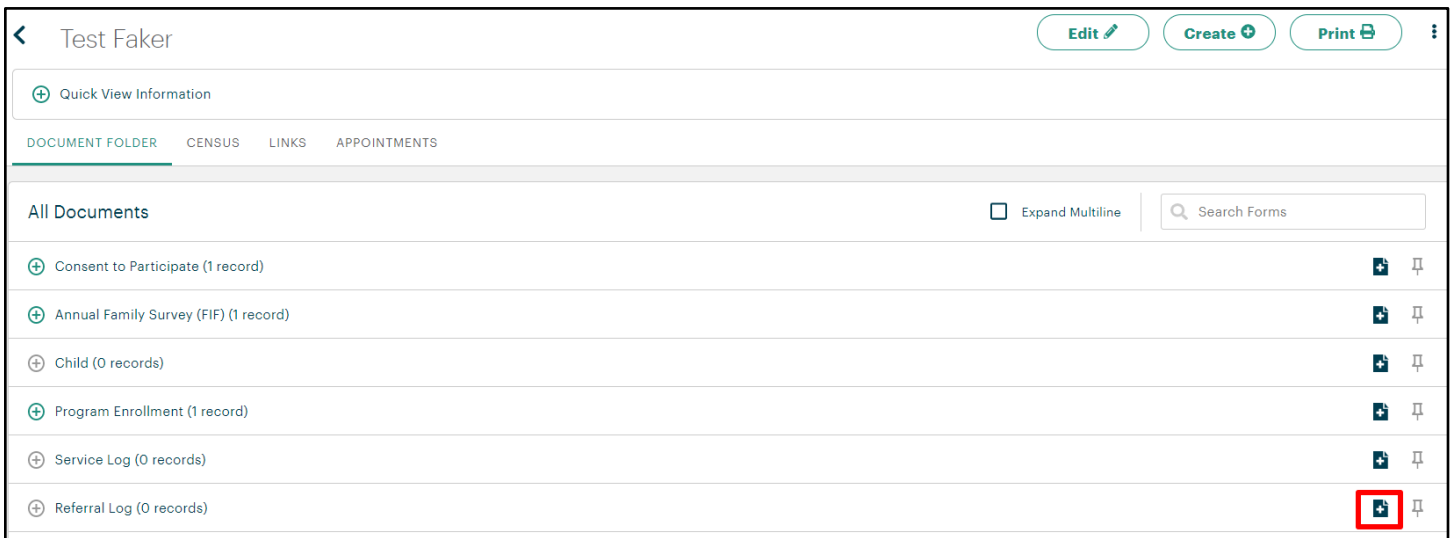
\*Result required? 🔒  
☒ Yes  
☐ No

\*Result  
☐ Normal  
☐ Minor concern - monitor  
☐ Concern - referral needed  
This field is required.

If you don't see a Program Enrollment for this Screening, please navigate back to the Parent's document folder to enroll the Parent in services.

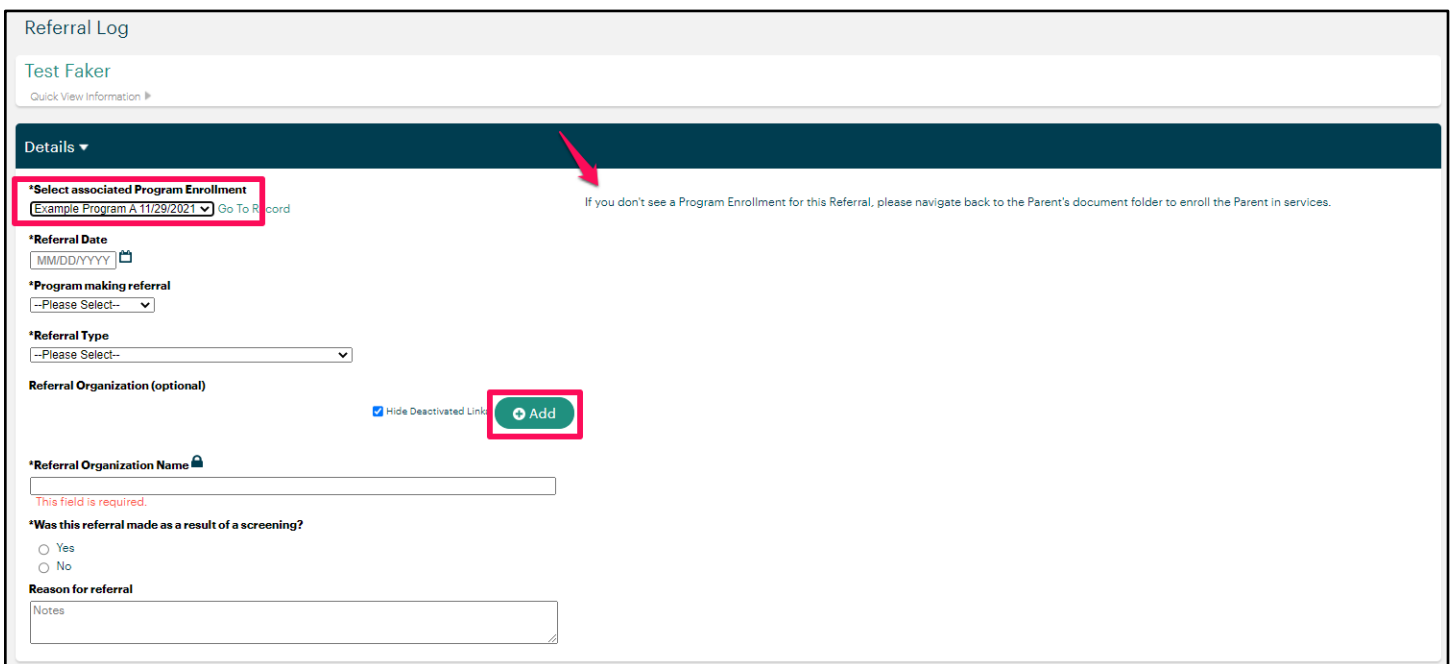
# How to log a Referral

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



The screenshot shows the 'Test Faker' document folder interface. At the top, there are buttons for 'Edit', 'Create', and 'Print'. Below these are tabs for 'DOCUMENT FOLDER', 'CENSUS', 'LINKS', and 'APPOINTMENTS'. The 'All Documents' section lists several documents: 'Consent to Participate (1 record)', 'Annual Family Survey (FIF) (1 record)', 'Child (0 records)', 'Program Enrollment (1 record)', 'Service Log (0 records)', and 'Referral Log (0 records)'. Each document entry has a '+' icon on the right. The '+' icon for 'Referral Log (0 records)' is highlighted with a red box.

- Notice this form requires you to select the Parent's Program Enrollment record in the first dropdown. If you don't see an option in this dropdown, please follow the instructions to the right of your screen.



The screenshot shows the 'Referral Log' form. The 'Details' section is expanded, showing a dropdown menu for 'Select associated Program Enrollment' with 'Example Program A 11/29/2021' selected. A red arrow points to the 'Details' section. Below this are fields for 'Referral Date', 'Program making referral', 'Referral Type', and 'Referral Organization (optional)'. The 'Add' button is highlighted with a red box. At the bottom, there is a 'Referral Organization Name' field and a 'Was this referral made as a result of a screening?' section with radio buttons for 'Yes' and 'No'. A 'Reason for referral' section with a 'Notes' field is also present.

- This form also 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.

Referral Organization Profile Search

Create New
Link All
Clear History

-- Add Search Field --
Browse All

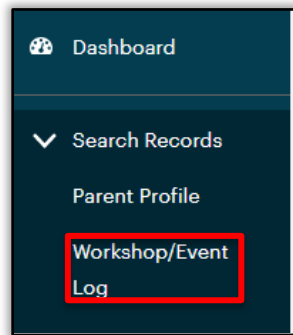
The following 3 Referral Organization Profile records are available

Organization	Status	Category
First 5 Yuba	Active	
First 5 Yuba - Program B	Active	
Sidekick Solutions	Active	

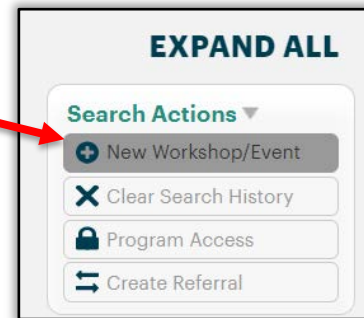
- Selecting an existing organization profile will auto-fill the name of the organization on the Parent's referral form. Additional information about Internal and External Referrals can be found below.

# How to Enter a New Workshop/Event Log

- From the My Apricot page expand “Search Records”
- Select Workshop/Event Log



- On the right side palette select New Workshop/Event



- Enter the event name, date and type

A screenshot of the 'Workshop/Event Log' form. The 'Main' dropdown is set to 'Main'. The 'Event Name' field contains 'Parent Information Night'. The 'Date' field is empty with a calendar icon. The 'Type' dropdown menu is open, showing options like 'Community Event', 'Community Workshop', and 'Other Activity/Event'. The 'Event Name', 'Date', and 'Type' fields are grouped together and highlighted with a red rounded rectangle.

- Answer Is part of SOW (Y/N). If the answer is yes, you will enter the appropriate scope of work activity.

A screenshot of a form section titled '\*Is part of Scope of Work?'. It has two radio buttons: 'Yes' (selected) and 'No'. Below this is a red star icon next to the text 'Scope of Work Activity' with a question mark, followed by an empty text input field.

- Continue through the form answering the remaining questions
- Attendance – enter the total number of people present in each category (parents, children, and providers)

**Screenings ▼**

**Were screening provided?**

☒ Yes  
☐ No

**Which of the following screenings were provided?**

☒ ASQ  
☐ ASQ-SE  
☐ Other developmental screening  
☒ ACEs  
☐ Mental health screening (e.g. Edinburgh)  
☒ Dental  
☐ Hearing  
☐ Vision  
☐ Immunization  
☐ Health insurance  
☐ Other

**How many ASQs?**

**How many ACEs?**

**Attendance ▼**

Number of parents	Number of children	Number of providers
<input type="text" value="20"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

- Complete the Resources section. If you answer, yes, a list of possible resources will appear
- Check the appropriate boxes and indicate the approximate number of resources provided

**Resources ▼**

**Did you provide any resources?**

☒ Yes  
☐ No

**Which of the following resources did you provide?**

☐ Pamphlets/Brochures  
☒ Educational materials  
☐ Community resources  
☒ Gift cards/incentives  
☒ Developmental activities/toys  
☐ Diapers  
☐ PPE  
☐ Calming kits  
☐ Books  
☐ New parent kits  
☐ Other

**How many developmental activities/toys?**

**How many gift cards/incentives?**

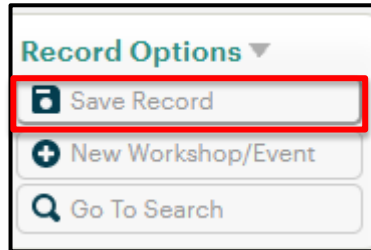
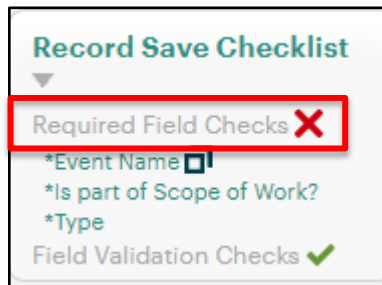
- Complete the Screenings section. If you answer, yes, a list of possible screenings will appear
- Check the appropriate boxes and indicate the approximate number of screenings provided
- On right side palette check the Assigned Program Palette

**Record Options ▼**

**Assigned Programs ▼**

- If your program is not listed, click program access and select your program

- On the right side palette check the Record Save Checklist
- Is there a ✓ next to Required Fields Checks and Field Validation Checks? If yes, Select Save Record on the record options palette



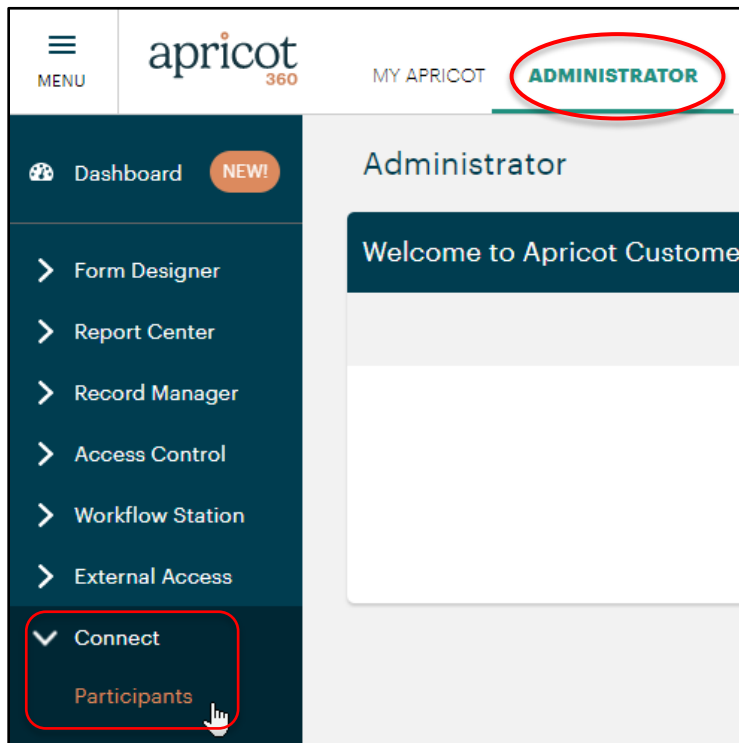


# How to Enroll a Parent in Connect

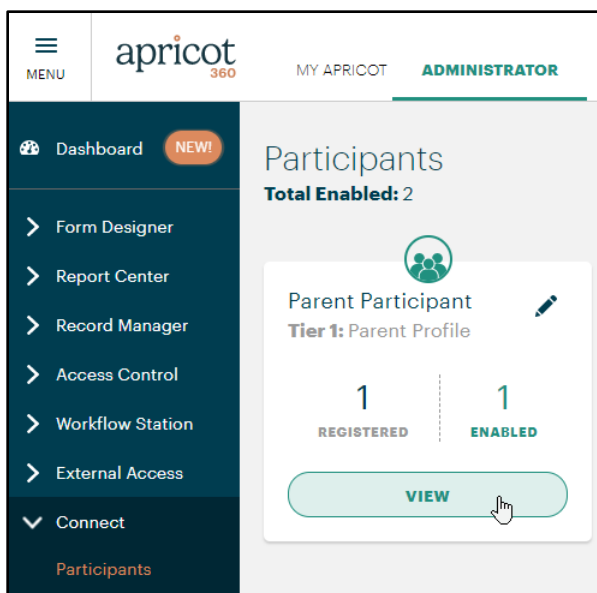
This is the first step in being able to send a form or other document through Connect.

Before a parent can receive a survey/form via Connect, they must first be registered. Registering parents will send them an email to create their password for Connect portal access.

- Click the Administrator Tab
- Click Connect on the left palette
- Select Participants



- Under “Parent Participant”, select the “VIEW” button.



- Select the “UNREGISTERED ” tab,
- Select the checkbox next to all the Parent Profiles that need to be registered, and
  - Optional - If you would like to customize the email that will be sent to your participants with their login information, click the text to **"Add some custom email language."**

REGISTERED 2 UNREGISTERED 52

① An email with a password setup link will be sent to all enabled participants. [Add some custom email language](#)

☒ Restrict list to participants updated within the last year.

- Optional – Add custom language in the pop up form and click “Save.”

**Account Setup - Custom Email Message**

Hello [Participant Name],

First 5 Yuba County has granted you access to Connect. Click the link below to set a password and log in.

<https://a112270.socialsolutionsportal.com/set-password?tokenid=00000000-0000-0000-0000-000000000000>

**ADD YOUR MESSAGE HERE...**

5000 characters remaining

- Select to “Create Account”.

apricot 360 MY APRICOT ADMINISTRATOR

< BACK Parent Participant Enabled: 2

REGISTERED 2 UNREGISTERED 60

① An email with a password setup link will be b

☒ Restrict list to participants updated withi

**Create Account (1)** Search...

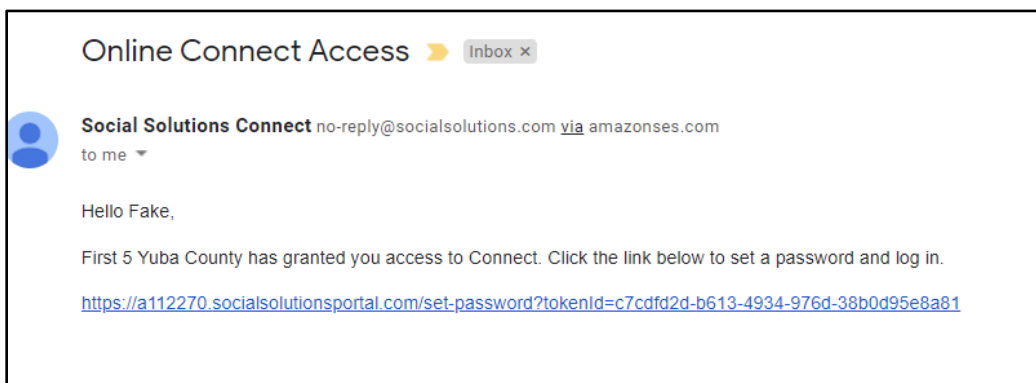
FIRST NAME 12

☒

- 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
- 

Account Creation Complete! <span>✕</span>			
✓ <b>Successful: 1 account</b>			
FIRST NAME ⇅	LAST NAME ⇅	EMAIL ⇅	REPORT ⌵
Carmen	Fake	crodriguez@co...	✓ <b>Success:</b> Password setup link sent!

- Parents will receive an email like this one

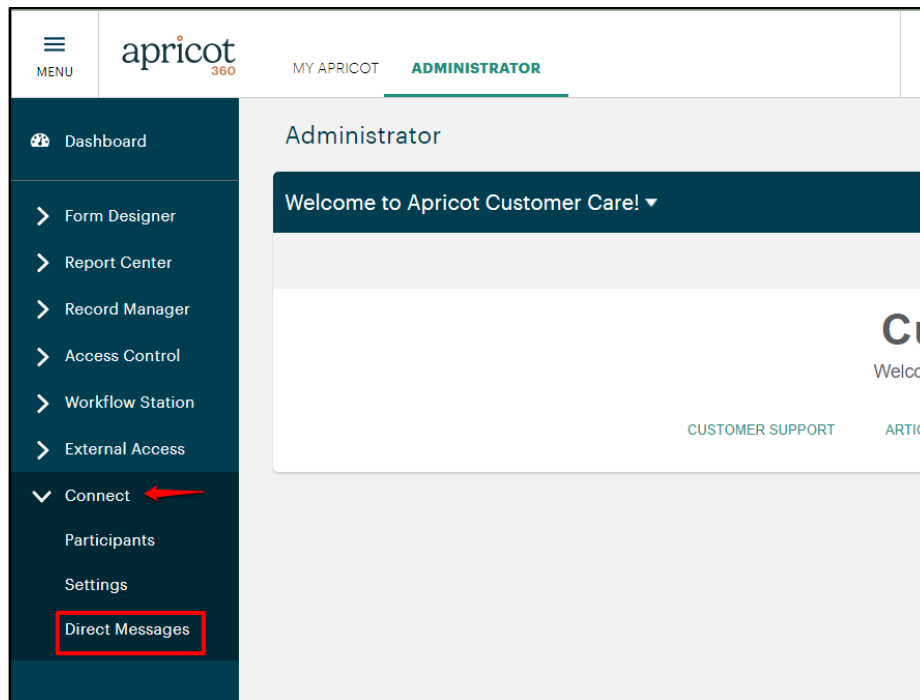


- Parent does not have to create an account to send them emails through Connect

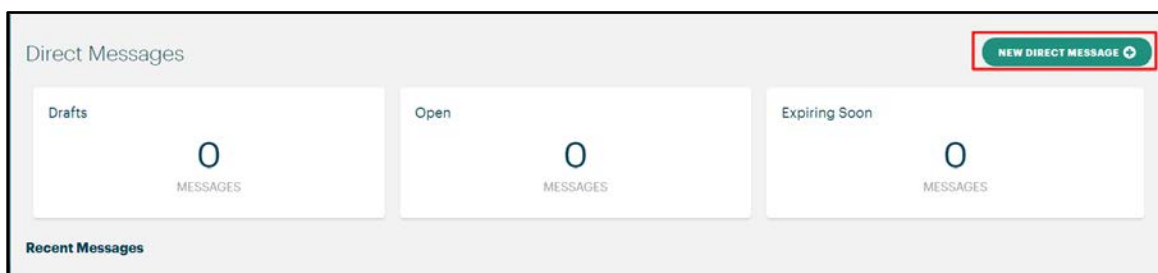
# How to Send a Survey/Form to a Parent via Connect

This feature is currently only available to administrators or standard users with elevated privileges assigned within Apricot. Before sending a parent a survey/form via Connect, you will first need to be sure they are registered to receive messages from 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.”



- 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
  - If your Parent Profile contains multiple email addresses or phone numbers, you will need to select which email/phone to use for your message.
  - When sending text messages, be sure the phone number listed on the Parent Profile is a mobile phone number, *not* a landline.

**New Direct Message**

1 Message Setup > 2 Select Recipients > 3 Compose Message > 4 Review & Send

**Message Setup** \*Required

**MESSAGE TITLE\***  
Example for User Guide - Consent Form  
Message Title is for tracking purposes in the Dashboard

**PARTICIPANT TYPE\***  
Parent Participant

**MAP NAME\***  
Name  
Select which Tier 1 field should be used for Name.

**MAP EMAIL**  
Email  
Select which Tier 1 field should be used for Email.

**MAP PHONE**  
-- Select --

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

SAVE & EXIT NEXT >

- **Select Recipients:** Use the search bar to search for individual recipients, or, sort the list by first or last name. Select the recipient(s) to whom you would like to send the form.

1 Message Setup > 2 Select Recipients > 3 Compose Message > 4 Review & Send

MESSAGE TITLE  
Example for User Guide - Consent Form

**Select Recipients** OPTED OUT PRIOR FAILURE Search... SEARCH

FIRST NAME	LAST NAME	EMAIL ADDRESS	EMAIL
Fake	Other-Practice	rtimoszyk@co.yuba.ca.us	<input type="checkbox"/>
Fake	Practice 2	rtimoszyk@gmail.com	<input type="checkbox"/>
Fake	Practice-Account	first5@co.yuba.ca.us	<input type="checkbox"/>
Fake	Teser	jeff+f5yuba@sidekicksolutionsllc.com	<input checked="" type="checkbox"/>

View 10

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

SAVE & EXIT NEXT >

- **Compose Message:** Configure the email title to read how you want your email message to start.
  - Best practice is to explain what the message is for and who it is from (for example “Annual Family Survey Form from First 5 Yuba Enclosed - Action required”)
  - The “From” email is set to default to First 5 Yuba ([first5@co.yuba.ca.us](mailto:first5@co.yuba.ca.us)).
- Select which survey/form you would like to send to the parent; in the image below we selected “Consent.”
- Select the correct program assignment

- You may also chose to attach additional documentation to the email, if needed (for example, instructions for the parent on how to log into the connect portal and complete the form.)

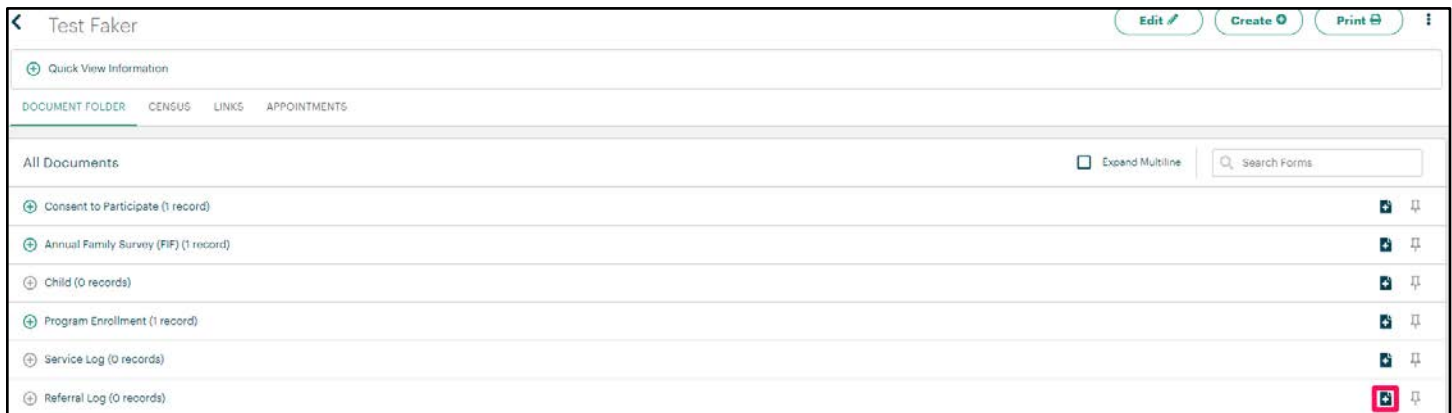
Click next at the bottom of the screen to move to the next step

- **Review and Send** - This screen will show a preview of the direct message as well as a list of recipients.

- Click the Send button at the bottom of the screen to send.

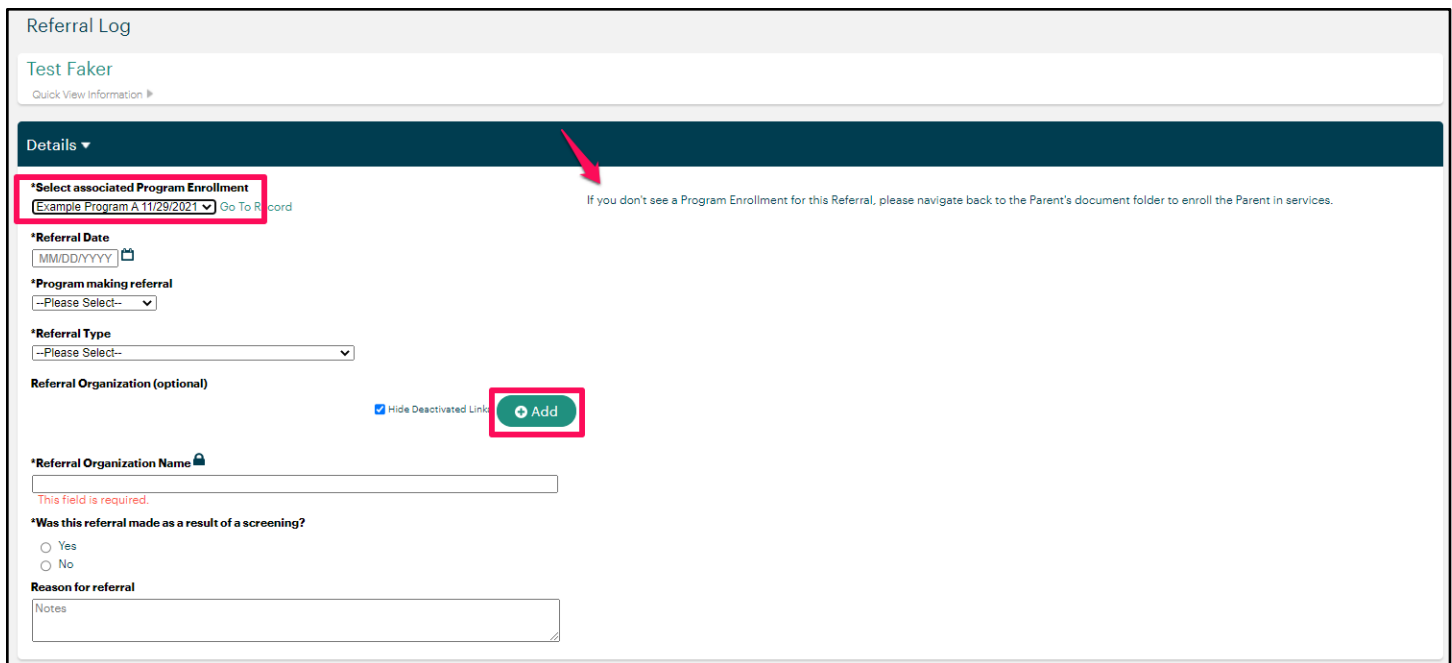
# How to Make an Internal Referral to a First 5 Grantee

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



The screenshot shows the 'Test Faker' document folder interface. At the top, there are tabs for 'DOCUMENT FOLDER', 'CENSUS', 'LINKS', and 'APPOINTMENTS'. Below these is a list of documents: 'Consent to Participate (1 record)', 'Annual Family Survey (FIF) (1 record)', 'Child (0 records)', 'Program Enrollment (1 record)', 'Service Log (0 records)', and 'Referral Log (0 records)'. The 'Referral Log' entry at the bottom has a red square icon with a white plus sign on its right side, indicating where to click to add a new referral.

- Notice this form requires you to select the Parent's Program Enrollment record in the first dropdown. If you don't see an option in this dropdown, please follow the instructions to the right of your screen.



The screenshot shows the 'Referral Log' form. The 'Details' section is expanded. The first dropdown menu, '\*Select associated Program Enrollment', is highlighted with a red box and shows 'Example Program A 11/29/2021'. A red arrow points to a message on the right: 'If you don't see a Program Enrollment for this Referral, please navigate back to the Parent's document folder to enroll the Parent in services.' Below this, there are fields for '\*Referral Date' (MM/DD/YYYY), '\*Program making referral' (a dropdown menu), '\*Referral Type' (a dropdown menu), and 'Referral Organization (optional)' (a checkbox for 'Hide Deactivated Link' and a '+ Add' button). The '+ Add' button is highlighted with a red box. Below these are fields for '\*Referral Organization Name' (with a red error message 'This field is required.'), '\*Was this referral made as a result of a screening?' (radio buttons for 'Yes' and 'No'), and 'Reason for referral' (a text area).

- 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. Click "save record" when complete.

Referral Log

Test Faker

Quick View Information

**Details**

\*Select associated Program Enrollment  
 Example Program A 11/29/2021 Go To Record

If you don't see a Program Enrollment for this Service, please navigate back to the Parent's document folder to enroll the Parent in services.

\*Referral Date  
 11/30/2021

\*Program making referral  
 Example Program B

\*Referral Type  
 Early learning setting or parent and child interaction activity

Referral Organization (optional)

Hide Deactivated Links Add

Referral Organization Profile			Link Info		
Organization %	Status %	Category %	Active %	Delete %	Date %
First 5 Yuba - Program B	Active	Child Development, Preschool, & Early Learning Parent Support	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Added on 11/30/2021

Total Active Links:1, Total Deactivated Links:0, Current Active Links:1, Current Deactivated Links:0

Referral Organization Name  
 First 5 Yuba - Program B

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

Reason for referral  
 Notes

**Record Options**

- Save Record
- Print Mode
- Archive Record
- View History
- New Referral Log
- View Folder
- Go To Search

**Assigned Programs**

- Playgroups and Creative Ar...
- Program Access

**Record Save Checklist**

- Required Field Checks
- Field Validation Checks

**Form Logic Rules**

If referral type is Other, make Other type required. Referral Organization is not empty. Referral Organization is empty. Send External Referral to Yes and Record ID is empty. Send External Referral to yes and Record ID is not empty.

**Last Saved**  
 11/30/2021 10:27 AM CST  
 Session Solutions

- NOTE: If referral organization is tagged as Grantee, after you save the record, a new section will appear at the bottom of the form to indicate if the referral is pending or complete:

**Referral Status for First 5 Yuba Grantees**

**Status**

☒ Pending  
☐ Complete

**Date Complete**  
 MM/DD/YYYY

- Once this status button is marked complete, a new field will appear to allow the user to create a new Program Enrollment record for the Parent from this form. Click "New" to create a new Program Enrollment record.

**Referral Status for First 5 Yuba Grantees**

**Status**

☐ Pending  
☒ Complete

**Date Complete**  
 11/30/2021

**Enroll Parent in Program**

Hide Deactivated Links New



## How to Make an External Referral to an Organization that is eligible for Apricot 360 Connect

- 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:

The screenshot shows the 'Fakey McFake Fake' form in the 'All Documents' view. The interface includes a header with the form name and buttons for 'Edit', 'Create', and 'Print'. Below the header, there's a 'Quick View Information' section. The main area displays a list of documents, each with a '+' icon on the right. A red arrow points to the '+' icon in the bottom right corner, indicating the 'Add New' button.

- Notice this form requires you to select the Parent's Program Enrollment record in the first dropdown. If you don't see an option in this dropdown, please follow the instructions to the right of your screen.

## Referral Log

### Test Faker


[Quick View Information](#)

**Details** ▾

**\*Select associated Program Enrollment**

Example Program A 11/29/2021 ▾ [Go To Record](#)

**\*Referral Date**



**\*Program making 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

If you don't see a Program Enrollment for this Referral, please navigate back to the Parent's document folder to enroll the Parent in services.

- 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 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

- 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 Links + Add

- Select “+Add” to open the “External Connect Referral Search” window, then click “(new)” to enter the External Referral.

External Connect Referral Search						Link All	Clear History	
-- Add Search Field -- 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			

- When new is selected, the external Connect Referral screen will open. 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 Options ▼

Save Record

New External Connect

View Folder

Go to Search

Assigned Programs ▼

Program Access

Record Save Checklist ▼

Required Field Checks ✖

\*Referral Date ✖

\*Participant/Client Informa... ✖

\*Reason for Referral ✖

\*Referral from ✖

Field Validation Checks ✔