

# Streamlining Staff Access to their Caseload

Welcome, we will start shortly!

# Meet Your Trainer

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# Learning Objective

The goal of this session is to equip you to set up and manage the Caseloads feature so your staff can focus their attention on their assigned Participants.

# Agenda

What is Caseloads

How to Configure

Managing Caseloads

Reminders

# What is Caseloads

# Caseloads

**Ability to assign specific Participants to Users, prioritizing and restricting their access to just those Participants.**

- Can be used with any Tier 1s (Volunteers, Donors, etc.).
- Ideal for organizations with strict security requirements.
- Requires Role Based Permissions.



# User Experience

My Apricot Tab > My Apricot Tools > My Caseloads

The screenshot shows the 'My Caseloads' page in the Apricot 360 system. The top navigation bar includes a menu icon, the 'apricot 360' logo, a notification badge for 'MY APRICOT' (1), the user role 'ADMINISTRATOR', 'All Sites' (Program All Programs), 'CHANGE' (pencil icon), 'NOTIFICATIONS' (bell icon), and the user profile 'Maranda Caseworker' with a dropdown arrow and the text 'Taylor's Role Based Permissions'. The left sidebar contains a 'MENU' and a list of navigation items: 'Dashboard' (with a 'NEW!' badge), 'Search Records', 'My Apricot Tools' (expanded), 'My Caseloads' (with a '2' badge), 'My Workflows', 'My Reports', 'My Bulletins', 'Schedule', 'Classes & Terms', 'My Referrals', 'My Network Referrals', and 'Referrals Directory'. The main content area is titled 'My Caseload' and features a 'Caseload Type:' dropdown menu set to 'Participant Profile'. Below this is a search bar with the placeholder text 'Search by Name...'. A table lists the caseloads with a 'NAME' header and three entries: 'Jane Doe', 'Erik Estrada', and 'Wednesday Addams', each with a right-pointing arrow. At the bottom of the table, there is a pagination control showing 'View 5' (dropdown), a left arrow, 'Page 1' (dropdown), 'of 1', and a right arrow.

# How to Configure

# Configuring Caseloads

**Step 1:** Configure Tier 1 for Caseloads.

**Step 2:** Configure Role for Caseloads.

**Step 3:** Assign Participants to Users.

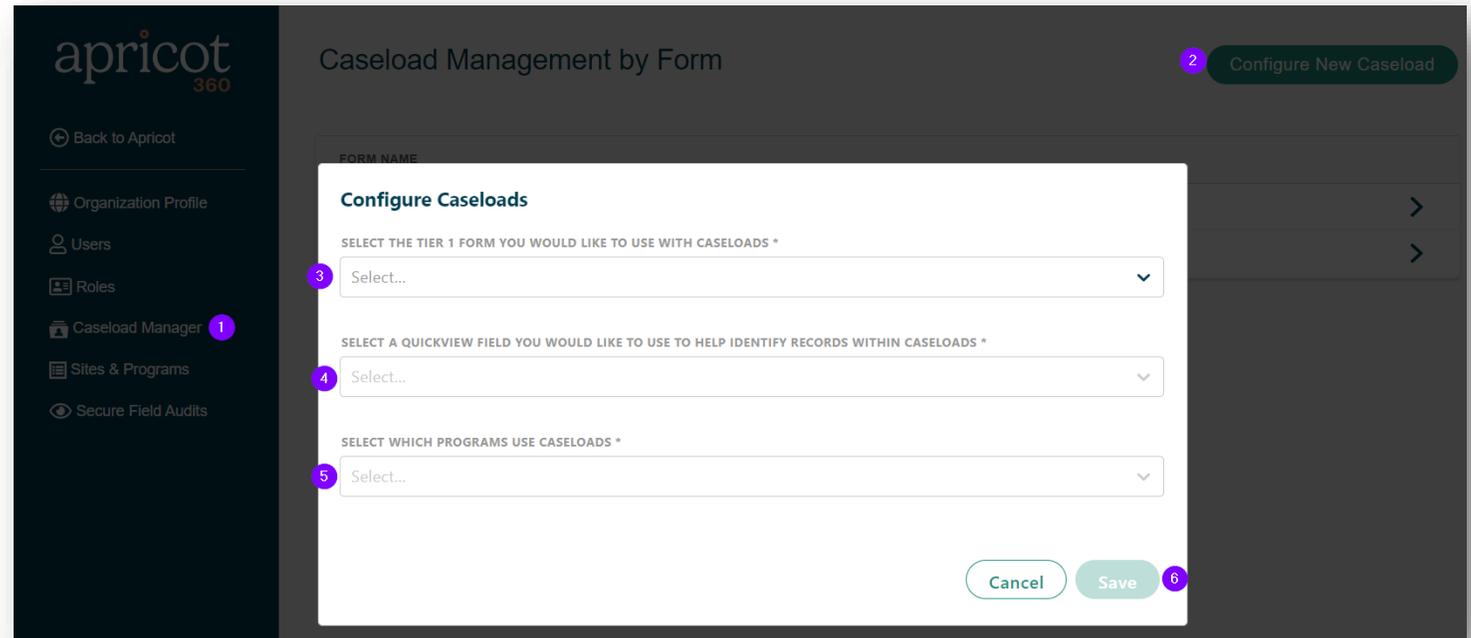
The screenshot displays the 'My Caseload' interface. At the top left, the title 'My Caseload' is visible. To the right, there is a 'Caseload Type:' label and a dropdown menu currently set to 'Participant Profile'. Below this is a search bar with the placeholder text 'Search by Name...'. The main area contains a table with the following data:

PARTICIPANT NAME	
Sarah Greene	>
Vicky Grayson	>
Lizette Williams	>

At the bottom of the interface, there are pagination controls: 'View' with a dropdown set to '5', a left arrow, 'Page' with a dropdown set to '1', 'of 1', and a right arrow.

# Step 1: Configure Tier 1 for Caseloads.

- Go to Access Control and **Sites & Programs**.
- Select **Caseload Manager** from the left menu.
- Click to **[Configure New Caseload]** at top right.
- Select the Tier 1 Form, Quick View field and Programs.



The screenshot displays the 'Apricot 360' interface for 'Caseload Management by Form'. A sidebar on the left contains navigation links: 'Back to Apricot', 'Organization Profile', 'Users', 'Roles', 'Caseload Manager' (marked with a purple circle 1), 'Sites & Programs', and 'Secure Field Audits'. The main area shows a 'Configure New Caseload' button (2) in the top right. A modal window titled 'Configure Caseloads' is open, featuring three dropdown menus: 'SELECT THE TIER 1 FORM YOU WOULD LIKE TO USE WITH CASELOADS \*' (3), 'SELECT A QUICKVIEW FIELD YOU WOULD LIKE TO USE TO HELP IDENTIFY RECORDS WITHIN CASELOADS \*' (4), and 'SELECT WHICH PROGRAMS USE CASELOADS \*' (5). At the bottom of the modal are 'Cancel' and 'Save' buttons (6).

# Step 2: Configure Role for Caseloads.

- Go to **Roles** and check the box for Caseloads for the corresponding Tier 1(s).
- Assign **Users** to that Role.

The screenshot displays the 'Case Management' configuration page in the Apricot 360 system. The left sidebar contains navigation options: Back to Apricot, Organization Profile, Users, Roles, Caseload Manager, Sites & Programs, and Secure Field Audits. The main content area is titled 'Case Management' and has two tabs: 'DETAILS & PERMISSIONS' (selected) and 'ASSIGNED USERS'. Under 'Role Details', the 'NAME' field is 'Case Management' and the 'DESCRIPTION' is 'These permissions allow users to access client records'. The 'Permissions' section includes 'Undo' and 'Redo' buttons and a search bar. Below this are tabs for 'FORMS', 'REPORTS', 'AGGREGATE REPORTS', 'BULLETINS', 'REFERRALS', 'SHARED FILES', and 'NETWORK REFERRALS'. A table shows permissions for various records, with the 'CASELOAD' column highlighted by a purple box. The 'Update' button is at the bottom right.

PROG. SPECIFIC	NAME	RECORDS								FORMS
		VIEW	SEARCH	CREATE	EDIT	ARCHIVE	IGNORE PROGRAM ASSIGNMENT	CASELOAD	VIEW SECURE FIELDS	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Caseloads, Standard User, Connect Test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Classes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Donor Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Step 3: Assign Participants to Users.

- For each **User** with a Caseload, assign **Participants** (Tier 1 Records).
- New Tier 1 records will be automatically assigned to the creating user or can be manually assigned by Admin.

### Assign Record(s) to Maranda Caseworker

Current Caseload: 3 records

All Available Records: **11 records**

<input type="checkbox"/>	Name
<input type="checkbox"/>	John Smith
<input type="checkbox"/>	Mary Robins
<input type="checkbox"/>	Clint Standard Program A/B
<input type="checkbox"/>	Carl Winslow
<input type="checkbox"/>	Test Testerson

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# Managing Caseloads

# Managing Caseloads

- Manage access limited to **Admins** and **Site Admins**.

The screenshot displays the 'Caseload Manager' interface in the Apricot 360 system. The sidebar on the left contains the following navigation items: 'Back to Apricot', 'Organization Profile', 'Users', 'Roles', 'Caseload Manager', 'Sites & Programs', and 'Secure Field Audits'. The main content area features a search bar (1) labeled 'Search by Staff Name...', a dropdown menu (2) set to 'All Programs', and a table with the following data:

STAFF NAME	CASELOAD	(3)	(4)
Maranda Caseworker	3 records	+	✎
Taylor Caseworker	4 records	+	✎
Referral Dude	1 records	+	✎
Test Login	3 records	+	✎

# Managing Caseloads

- Participant Records can be added, removed or transferred from a User's Caseload as needed.
- When viewing one Caseworker's Caseload, you can see where there are multiple staff assigned.

### Edit Maranda Caseworker's Caseload

Current Caseload: 3 record(s)

CASELOAD   TRANSFER

Search:  Select...

NAME	ASSIGNED STAFF	
Jane Doe	Taylor Caseworker, Clint RBP, Maranda Caseworker, Bottom Text, Test Login, Referral Dude	<input type="button" value="trash"/>
Erik Estrada	Taylor Caseworker, Maranda Caseworker, Bottom Text, Test Login, Inactive Pablo	<input type="button" value="trash"/>
Wednesday Addams	Taylor Caseworker, Maranda Caseworker, Test Login, Inactive Pablo	<input type="button" value="trash"/>

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# Managing Caseloads

- New Records can be assigned individually or in bulk to Users.
- Only apply to Tier 2s if more strict security required (URLA).

### Assign Programs

**Add Case Manager**  
   
**Assigned Case Managers**

**Available Programs**   
Advocacy  
All Access  
Better Homes  
College Prep TX  
Donor Management  
Empowering Families

**Assigned Programs**   
Counseling  
Employment Support  
Housing Support

You must save the record for the access changes to be applied

# User Record Level Access

- Applying Caseloads to Tier 1 and Tier 2 records.
- Limits access to only records a user creates or has been assigned.
- Requires more effort to manage.
- Recommended if your org has strict confidentiality requirements.

PROG. SPECIFIC	NAME	RECORDS							CASELOAD	VIEW SECURE FIELDS
		VIEW	SEARCH	CREATE	EDIT	ARCHIVE	DESIGN	IGNORE PROGRAM ASSIGNMENT		
	<b>Caseworker Profile</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<b>Classes Offered</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<b>Household Profile</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Emergency Service	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Referred By	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<b>Participant Profile</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Class Attendance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Counseling Appointment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Individualized Service	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Positive Parenting Assessment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Program Enrollment and Exit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

# Reminders

# Best Practices

1. When using Caseloads, make sure those users don't have another Role without or it will negate this feature.
2. Designed to be used at the Tier 1 level, but can be applied to Tier 2s to further restrict access (like URLA).
3. Caseloads are managed by Admins, but you can give Standard Users access to manage by making them Site Admins.



# Additional Resources

# Additional Training Opportunities

- [Knowledge Base](#) – How-To Articles (Search Chat or Visit Online)
- [Bonterra Academy](#) – Free Webinars & Recordings
- [Foundations](#) – Intensive, Multiday Courses to Cover Admin Basics
- [Admin Labs](#) – 2 Hour Live Trainings on Specific Capabilities
- [Private Training](#) – 1:1 Sessions with Training Expert in Your Apricot (End User & Admin Topics Available)

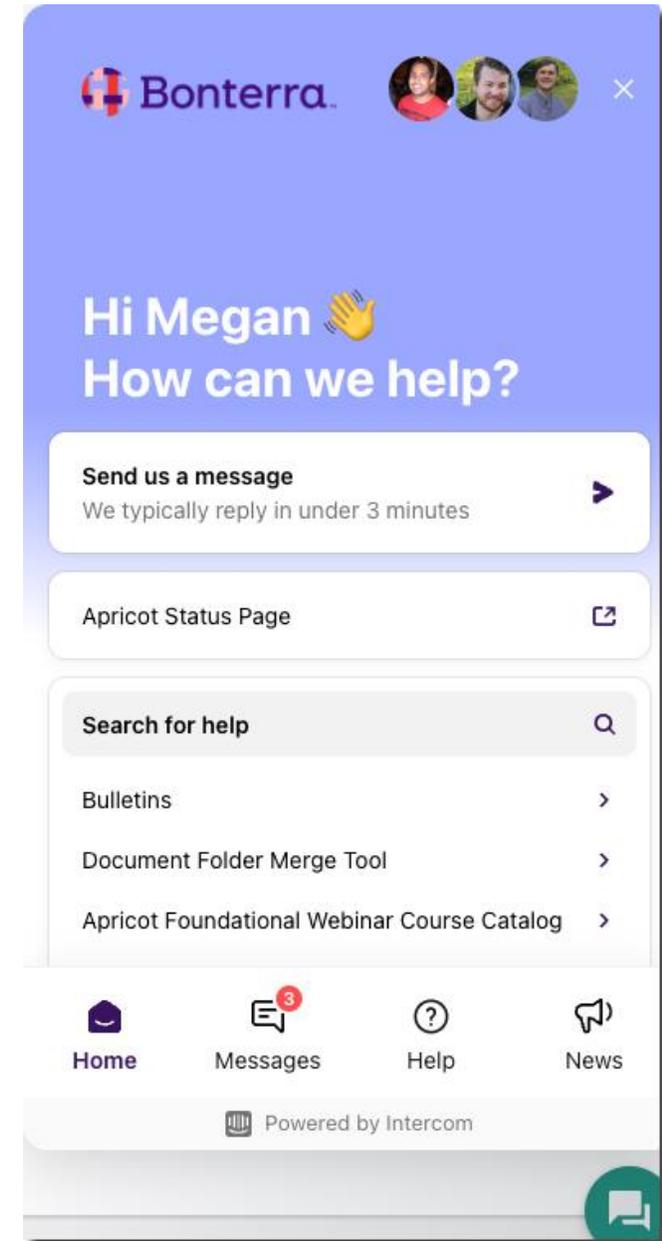


Build confidence & knowledge in  
our software!

# Customer Support

Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email:  
[apricot@bonterratech.com](mailto:apricot@bonterratech.com)



# Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you  
in future trainings.