

# Building Your Intake Form

Apricot Targeted Webinar



# Meet Your Trainer

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# Learning Objective

This training will cover:

- What is an Intake form
- Steps for how to build an Intake form
- Steps to edit an existing Intake form

By the end of this session, the goal is for you to feel confident building, and utilizing an Intake form within Apricot.

# Agenda

Intake Forms

Building an Intake Form

Editing an Intake Form

# Intake Form

# Intake Forms

- Feature that allows individuals/agencies to refer in through a link on your website/email
- Creates a Tier 1 record in your Apricot
- Configurable to capture important details


Services / Case Notes


**Michael L Jones**  
Quick View Information ▶

Main ▼


**\* Related Program Enrollment**

Links to be Added Upon Save  
- Housing & Food Pantry

**Program**   
Housing & Food Pantry ▼

**\*Date of Service**  
04/29/2024 

**\*Service Provided**  
Meal Provided ▼

**\*Total Time**   
30

**Did you discuss goals?**

Yes  
 No

**Service Notes**  
Intro discussion around food security workshops and meal provided. Will dive into goals if client agrees to participate further.

# Building Your Intake Form

# Accessing your Intake Form

- Accessible from the Administrator side of Apricot underneath the “External Access” section
- You can view and/or edit existing Intake forms
- You can create a new Intake form

apricot 360

MY APRICOT **ADMINISTRATOR** 1

Site Megan's Training Site  
Program Counselling

CHANGE

Megan Dodds  
Megan's Apricot 360 (117741)

MENU

Dashboard

Inventory

Form Designer

Report Center

Record Manager

Access Control

Workflow Station

External Access

2 Intake Forms

## Intake Forms

4 CREATE NEW FORM

Intake Forms List View 10

FORM NAME ↓	TIER 1	ATTACHED TIER 2	STATUS	
Participant Intake Form - Spanish	Participant		Unpublished	3

View 10



# Create New Intake Form

- Select “Create New Form” in the top right
- Name the form
- Select the associated Tier 1
- Edit form details
  - Name
  - Description
  - Add additional fields
  - Program Enrollment

Helping Hands Intake Form **1**

Please complete this form to be contacted by a member of our intake team for an initial consultation.

Legal Name\*

FIRST\*

MIDDLE

LAST\*

Date of Birth\*

false

**Program Enrollment**

**3** Intake

**Form Designer Choices**

Search...

Legal Name differs from Preferred Name?

Preferred Name/Nickname

Nickname or Alias?

Email

**2** Mobile Phone

Monthly Income

Social Security Number

Home Phone

Drivers License Number

Mailing Address

CANCEL PREVIEW SAVE

# Program Enrollment

- Ensure all Tier 1 and 2 forms you are using in the Intake form are assigned to the selected program
- On the form, Program Assignment type must be:
  - User selects program assignment
  - Assign records to user's active programs

## Program Enrollment

Intake



## Program Enrollment

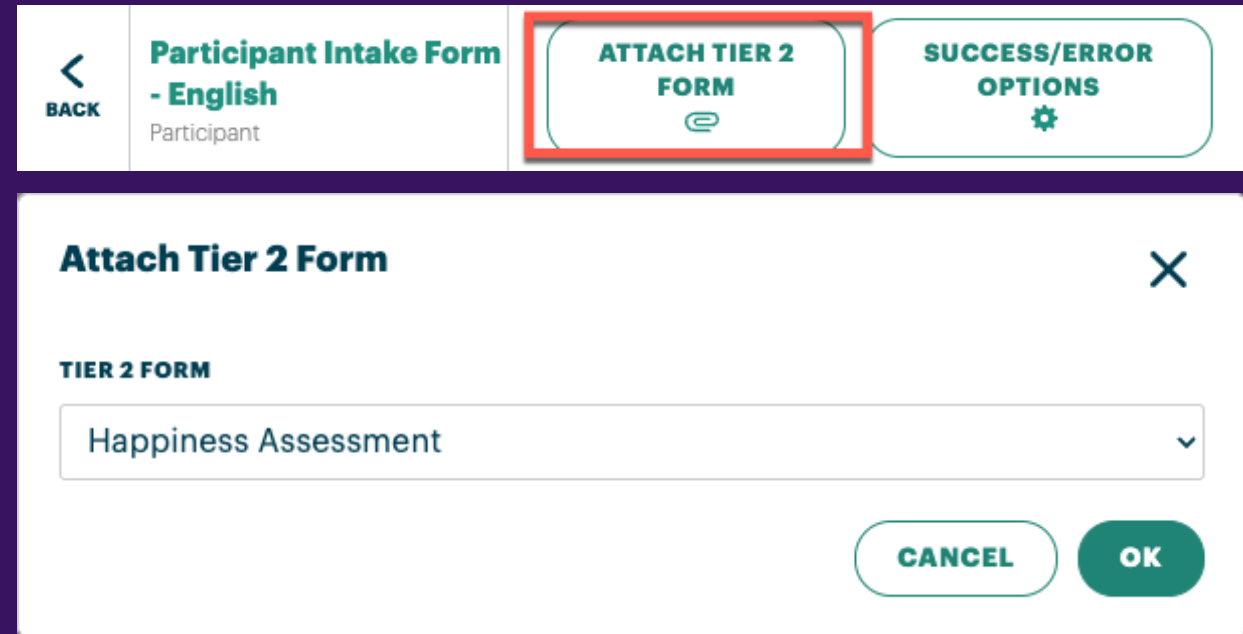
The Program Assignment Type for the selected forms are set to use "Forms Associated Permissions".

To use with Connect, please change the setting to use any other Program Assignment Type.

# Adding Tier 2 Form

You can add a Tier 2 form to your Intake if that is part of your workflow:

- Select "Attach Tier 2 Form"
- Select Form and "OK"



The screenshot displays the 'Participant Intake Form - English' interface. The top navigation bar includes a 'BACK' button, the title 'Participant Intake Form - English', and a 'Participant' label. The main content area features three buttons: 'ATTACH TIER 2 FORM' (highlighted with a red box), 'SUCCESS/ERROR OPTIONS', and a settings gear icon. Below this, a modal window titled 'Attach Tier 2 Form' is open, showing a dropdown menu for 'TIER 2 FORM' with 'Happiness Assessment' selected. The modal also contains 'CANCEL' and 'OK' buttons.

# Add Tier 2 Fields

- All required fields from Tier 2 form will now populate on the Intake form
- Under “Form Designer Choices”, you can navigate between the Tier 1 and Tier 2 form to add in additional questions
- Drag and drop questions as needed into the form

The screenshot displays the Bonterra form designer interface. At the top, there is a navigation bar with a back arrow, the title "Participant Intake Form - English", and the subtitle "Participant". To the right, it indicates "ATTACHED TIER 2 Happiness Assessment" and a "SUCCESS/ERROR OPTIONS" button. Below the navigation bar, the form fields are visible: "Gender Identity\*", "Primary Language\*", and "Happiness Assessment". The "Happiness Assessment" field is highlighted with a red border and contains two radio button options: "Pre" and "Post". On the right side, there is a sidebar with "Program Enrollment" (set to "Intake") and "Form Designer Choices". The "Form Designer Choices" section includes a search bar and a dropdown menu set to "Tier 2 Form". Below this, a list of questions is shown, with "Date of Assessment" highlighted by a red callout box with the number "2".

# Edit Fields

Once added into the form, you can edit:

- The name of the field
- The tooltip to provide context/instruction for clients when answering
- Whether the question is required

The screenshot displays a form editor interface. The main form area contains a section titled "Happiness Assessment" with a "Pre/Post Assessment\*" label and two radio button options: "Pre" and "Post". Below this is a visual scale for the question "I feel happy most days", ranging from "Always" to "Never" with a "Sometimes" midpoint. A red circle with the number "1" and an edit icon are positioned over the question text. At the bottom of the form is a reCAPTCHA "I'm not a robot" checkbox.

The right-hand configuration panel is titled "Edit I feel happy most days" and includes the following settings:

- Label:** I feel happy most days (1978 characters remaining)
- Tooltip:** (500 characters remaining)
- Standard Properties:**  Required

At the bottom of the configuration panel, there are "Remove" and "Apply" buttons, with a red circle containing the number "2" over the "Apply" button.

# Success/Error Options

Upon successful completion of the intake form, you can choose to:

- Reload the intake form upon successful completion
- Redirect to another page
- Display specific language –a success message or next steps

If there is an error and the form was not submitted, you can choose which error to display to your participants.

## Success/Error Options

**SUCCESS OPTIONS**

ERROR OPTIONS

Please select which action your participants should experience upon successful completion of the form.

- Kiosk Mode (Default)**  
Default success message will display before automatically loading a new, blank version of this form.
- Redirect URL**  
Enter redirect URL  
  
e.g. <http://www.yourcustomurl.com/>
- Custom Language Display**  
Write custom language for display  
  
Custom language here...

CANCEL

SAVE

# Preview & Publish

Once you have finished editing your form you will want to:

1. Preview
2. Publish

The screenshot displays the Bonterra form editor interface. At the top, there is a navigation bar with a 'BACK' button, the title 'Participant Intake Form - English' (with 'Participant' below it), and 'ATTACHED TIER 2 Happiness Assessment'. A 'SUCCESS/ERROR OPTIONS' button with a gear icon is also present. On the right side of the navigation bar, there are icons for 'FORM URL', 'RETRACT' (with a red circle containing '2'), 'PUBLISH', and 'DELETE'.

The main content area shows the form preview. The title is 'Helping Hands Intake Form'. Below the title is a text box containing the instruction: 'Please complete this form to be contacted by a member of our intake team for an initial consultation.' The form fields are as follows:

- Legal Name\***: A section with three input fields labeled 'FIRST\*', 'MIDDLE', and 'LAST\*'. The 'FIRST\*' field is currently empty.
- Date of Birth\***: An input field containing the text 'false'.

On the right side, there is a sidebar with two sections:

- Program Enrollment**: A dropdown menu currently set to 'Intake'.
- Form Designer Choices**: A search bar with the text 'Search...' and a dropdown menu set to 'Tier 1 Form'. Below this are several toggleable options, each with a grid icon: 'Legal Name differs from Preferred Name?', 'Preferred Name/Nickname', 'Nickname or Alias?', 'Email', 'Mobile Phone', 'Monthly Income', 'Social Security Number', 'Home Phone', 'Drivers License Number', and 'Mailing Address'.

At the bottom of the interface, there is a dark teal bar with a 'CANCEL' button, a red circle containing the number '1', a 'PREVIEW' button, and a 'SAVE' button. A chat icon is visible in the bottom right corner.

# Editing Your Intake Form



# Edit Intake Forms

- You can edit Intake forms after they have published, or you can save unpublished forms to continue editing at a later time



View Form URL – only published forms



Edit Intake Form



Publish (green)/Unpublish (red)



Delete Intake Form



Preview Intake Form

Participant Intake Form - English

Participant

Happiness Assessment

Unpublished



Participant Intake Form - Spanish

Participant

**Published**



# 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)

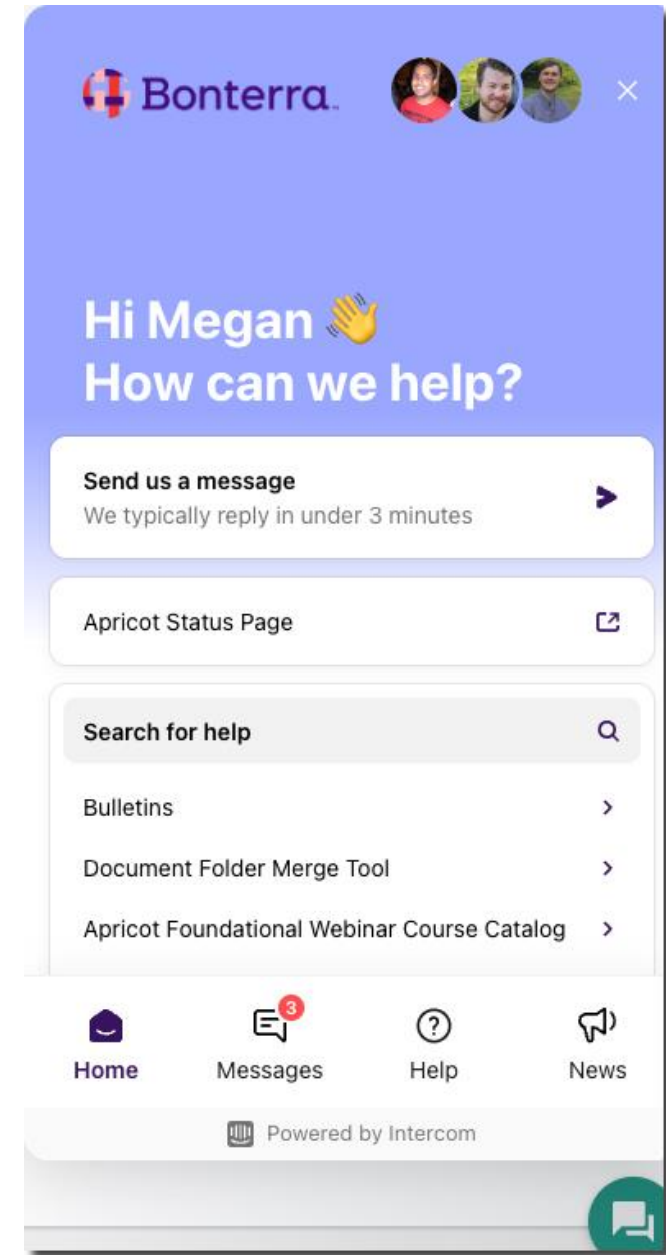


Build confidence & knowledge in  
our software!

# 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.