

Streamlining Staff Workflow

Welcome, we will start shortly!

Meet Your Trainer

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Learning Objective

Our goal for this session is to arm you with features and best practices that will streamline your staff's day-to-day workflow in Apricot, optimizing their data entry and management experience.

Agenda

Workflow Overview

Document Folder Design

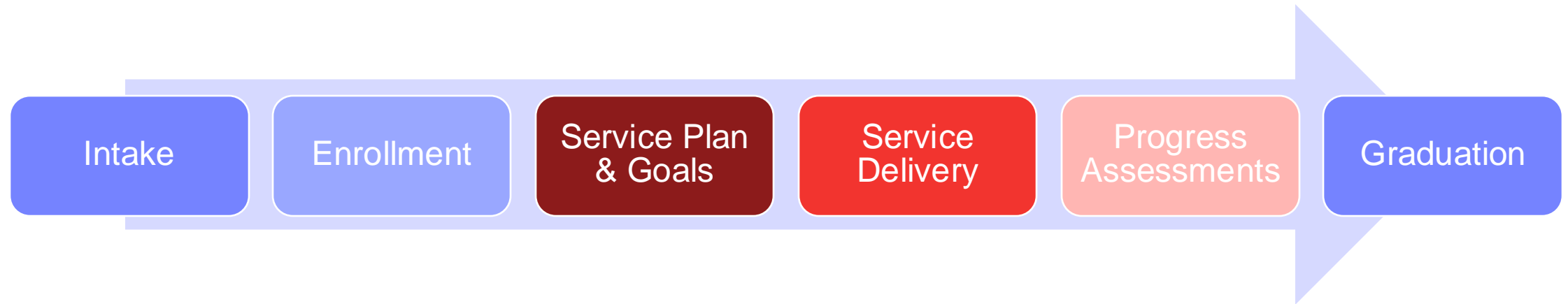
Single Form Optimization

Multi-Form Workflows

Workflow Overview

Workflow Overview

- Process your staff goes through to manage Participants from Intake to Exit.
- Opportunity to optimize based on features that reduce time & effort required.



Questions to Consider:

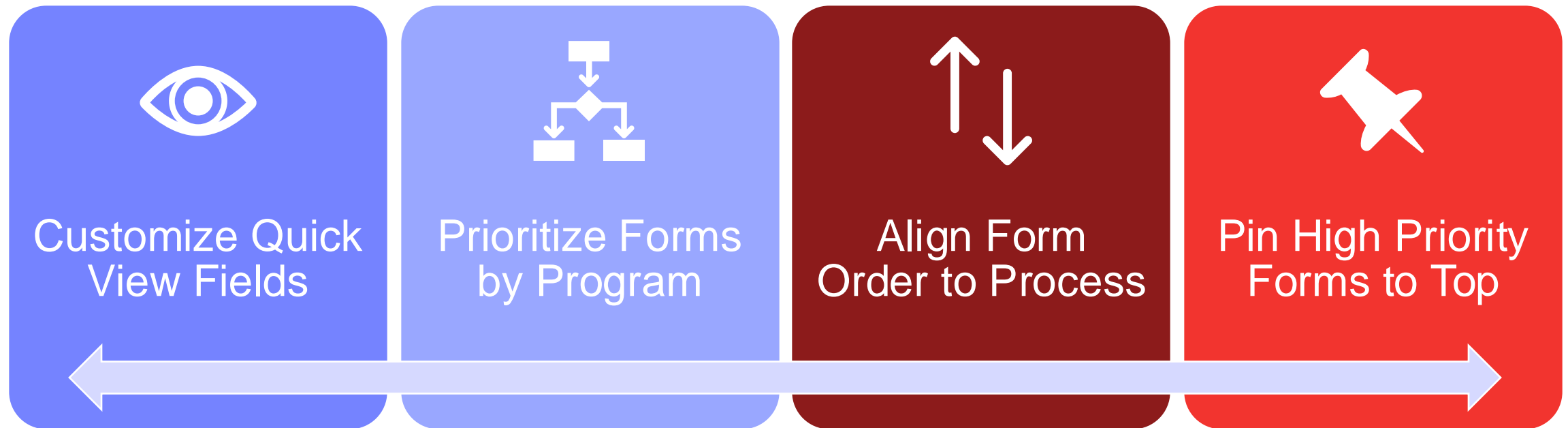
- How can you fit Apricot into the steps your staff are taking offline?
- Are there ways to improve our current processes with digital support?
- Can you improve your current Apricot Workflow to reduce barriers?

Document Folder Design

Document Folder Design

Information Hub for Each Participant

Opportunities to Streamline:



Quick View Fields

Tier 1 Form:

- Data from Tier 1 visible at top of Document Folder & when viewing / completing Tier 2s.
- *What might your staff need to reference?*

Tier 2 Forms:

- Table of data for created Tier 2s records.
- *What is most important at a glance & supports finding the right record to open?*

The screenshot displays a user interface for a client named Jane Doe. At the top, there are navigation buttons for 'Edit', 'Create', and 'Print'. Below this is a 'Quick View Information' section, which is highlighted with a blue box. This section contains a table with the following data:

PARTICIPANT NAME	DATE OF BIRTH	CLIENT STATUS	CLIENT EMAIL
Jane Doe	01/01/1997	Active	jdoe@fake.com

GENDER	EMPLOYED	HOUSEHOLD ADDRESS (AUTO POPULATION FIELD)
Female		No address on record

Below the quick view information is a navigation bar with tabs for 'DOCUMENT FOLDER', 'CENSUS', 'LINKS', 'ENROLLMENTS', and 'APPOINTMENTS'. The 'DOCUMENT FOLDER' tab is selected. Underneath, there is a section for 'All Documents' with an 'Expand Multiline' checkbox and a search bar. Below this, there are three expandable sections: 'Program Enrollment and Exit (1 record)', 'Individualized Service (2 records)', and 'Service Tracking NEW (0 records)'. The 'Individualized Service (2 records)' section is highlighted with a blue box and contains a table with the following data:

Service Date	Service Type	Funding Source	Service Time in Hours	Service Notes
05/27/2024	Phone Consultation	Grant	0.5	Apartment search tips
05/06/2024	Counseling - Individual Session	Grant	1	Reviewed housing needs

Prioritize Forms by Program

- Use Programs & Roles to streamline which Forms & Records are visible by relevance.

The image displays two side-by-side screenshots of the Apricot 360 user interface, illustrating how program selection affects the visibility of records for a user. A central blue oval with the text "Vs." is positioned between the two screenshots, with blue arrows pointing from it to the respective program selection boxes in each interface.

Left Screenshot (Program: Site Apricot Training - Program Better Homes):

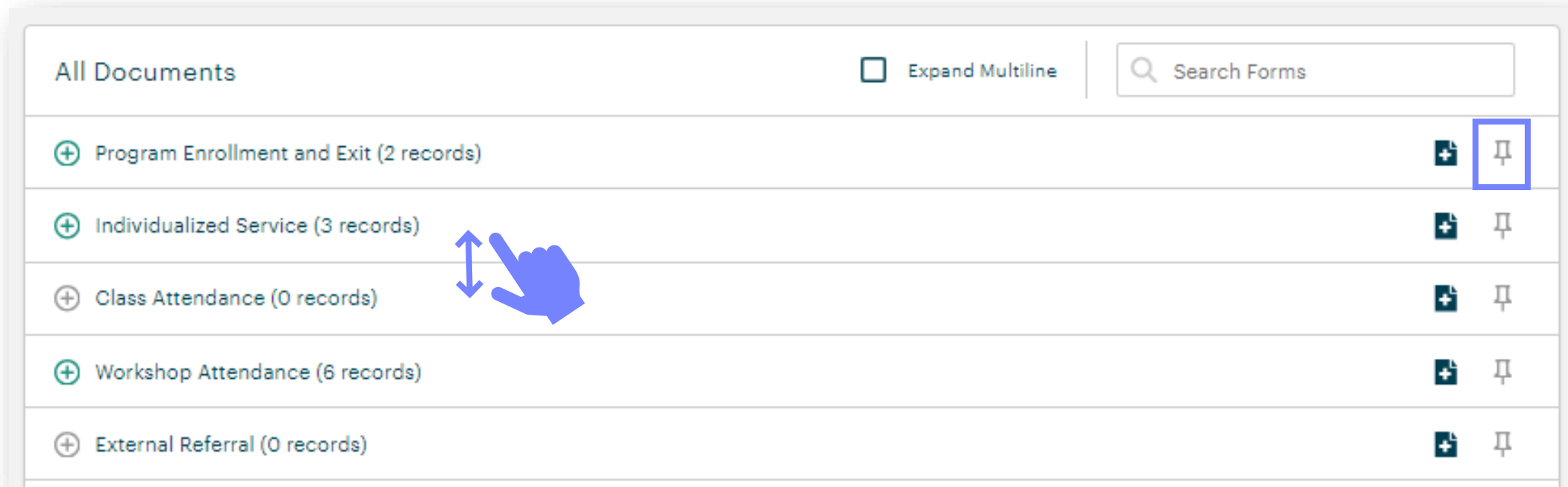
- Header:** Site Apricot Training, Program Better Homes
- User:** April Billingslea
- Menu:** Search Records (expanded), Participant Profile, Household Profile, Caseworker Profile, Referral Partner, My Apricot Tools
- Records:** All Documents (Expand Multiline), Program Enrollment and Exit (0 records), Individualized Service (0 records), External Referral (1 record)

Right Screenshot (Program: Site Apricot Training - Program Workforce):

- Header:** Site Apricot Training, Program Workforce
- User:** Alicia Henry
- Menu:** Search Records (expanded), Participant Profile, Household Profile, Classes Offered, My Apricot Tools
- Records:** All Documents (Expand Multiline), Program Enrollment and Exit (0 records), Individualized Service (0 records), Class Attendance (5 records), Workshop Attendance (3 records), Soft Skills Assessment (0 records)

Order & Pin Tier 2 Forms

- Admins can drag & reorder forms based on process.
- Individual Users can pin or Favorite forms to the top.



The screenshot displays a user interface for managing documents. At the top, there is a header with the text "All Documents", a checkbox labeled "Expand Multiline", and a search bar labeled "Search Forms". Below the header is a list of five document categories, each with a plus icon, a title, and a record count. To the right of each category are two icons: a plus icon and a pin icon. A blue hand cursor is positioned over the "Class Attendance (0 records)" category, with a vertical double-headed arrow indicating a drag action. The pin icon for the "Program Enrollment and Exit (2 records)" category is highlighted with a blue square.

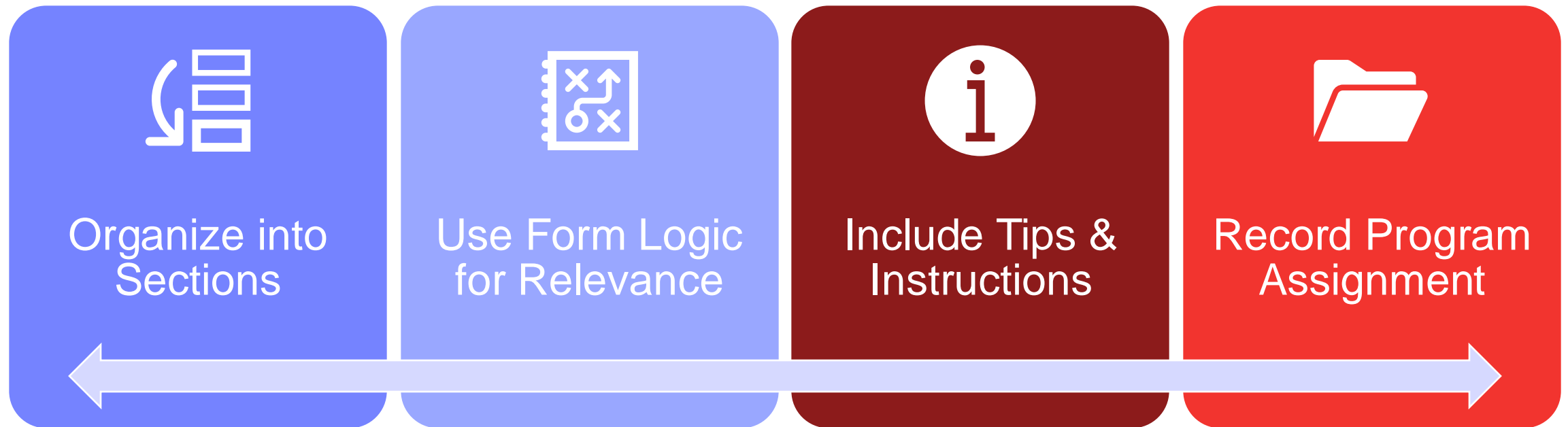
Document Category	Records	Expand Icon	Pin Icon
Program Enrollment and Exit	2 records	+	📌
Individualized Service	3 records	+	📌
Class Attendance	0 records	+	📌
Workshop Attendance	6 records	+	📌
External Referral	0 records	+	📌

Single Form Optimization

Single Form Optimization

Process for Completing Individual Forms

Opportunities to Streamline:



Organize into Sections

- Group related fields for logical data entry flow
- Use the “Start Collapsed” for special use case sections
- Couple with Form Logic to Unhide when relevant

The screenshot displays a form titled "Program Enrollment and Exit" with a "COLLAPSE ALL" button in the top right. The form is organized into sections: "Enrollment Information", "Services", "Exit Information", and "System Fields". Each section has a gear icon for configuration. The "Enrollment Information" section is expanded, showing a text box with instructions, a "Program *" dropdown menu, an "Enrollment Date *" date picker, an "Assigned Caseworker *" dropdown menu, and an "Enrollment Notes" text area. A "Section Properties" dialog box is open over the "Services" section. The dialog box has a "Display Name" field with the value "Services". Under "Default Display", the "Collapsed" checkbox is checked, and the "Hidden" checkbox is unchecked. The "Tab Order" dropdown is set to "Row by Row". An "Apply" button is at the bottom right of the dialog box. On the right side of the form, there is a "Field Choices" panel with a list of field types: All, Demographic, Option, Text, Numeric, Calculation, Date and Time, Upload, Hyperlink, Linking, Special, and Smart Fields. Below this panel are buttons for "+ Add Section" and "2 Resources". At the bottom right of the form, there are buttons for "Previous Version", "Deactivate Form", "Form Permissions", "Return to Form List", and a "Show/Hide Inactive Fields" checkbox.

Form Logic for Relevance

- Ability to base future fields on previous answer choices

Example Optimizations:

- Unhide or Require Fields / Sections
- Expand or Scroll to relevant Section
- Choose Lookup List for fitting answers
- Lock Fields that shouldn't be edited

The screenshot displays the 'Form Rules' configuration interface. At the top, there is a dark teal header with the text 'Form Rules' and a dropdown arrow, and a 'New Rule' button on the right. Below the header, there are two main sections: 'Child' and 'Adult'. Each section has a gear icon for settings. The 'Child' section is highlighted with a blue border. It contains a '+ Conditions' section with two conditions: 'Client Type Equals Child' and 'Age Is Less Than 18'. Below these conditions is a 'Condition Logic' section with a dropdown menu set to '1 or 2'. Underneath is a '+ Actions' section with one action: 'Unhide Child Information section'. The 'Adult' section also has a '+ Conditions' section with one condition: 'Client Type Matches Any Of Adult', and a '+ Actions' section with one action: 'Unhide Adult Information section'.

Include Tips & Instructions

Label Fields:

- Allow for adding text into Forms
- Simple text & HTML / formatted options
- Form Logic can show when relevant

Tool Tips & Hints:

- Offer clarification & guidance by field
- Give example data

The image displays a software interface for editing a form titled "Enrollment Information". The form contains several fields: "Program*" (a dropdown menu with "--Please Select--"), "Enrollment Date*" (a date input field with a calendar icon and the format "MM/DD/YYYY"), "Assigned Caseworker*" (a dropdown menu with "--Please Select--"), and "Enrollment Notes" (a text area labeled "Notes").

A "Field Properties (label (html))" dialog box is open over the form, showing a rich text editor toolbar with options for source, undo, redo, bold, italic, underline, strikethrough, text color, background color, text size, styles, font, and size. The text area in the dialog contains the instruction: "Complete this record when a client enrolls in a new program. When the client exists the program, open this record and fill in the Exit information below. All services received during this enrollment period should be linked to this record." Below the text area are "Standard Properties" checkboxes for Required, Duplicate Check, Locked, Quick View, Searchable, and Hidden. At the bottom of the dialog are "Deactivate" and "Apply" buttons.

A second dialog box, titled "Hint", is also open, showing a "Hint" field with the text "Notes" and an empty "Tooltip" field. It also has "Deactivate" and "Apply" buttons at the bottom.

Record Program Assignment

- Choose automatic assignment options as much as possible for ease & consistency.
- Only use manual assignment when necessary to avoid extra clicks & user error.

Program Assignment Type

User selects program assignment

User selects program assignment

Assign records to form's associated programs

Assign records to user's active programs



Assign Programs

Available Programs Add All >>

- Advocacy
- Better Homes
- Counseling
- Intake
- MultiService
- Program Alumni
- Workforce

Assigned Programs << Remove All

- Empowering Families

Add >

< Remove

Use the Add and Remove buttons above to update program assignment

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

Apply Cancel

Multi-Form Workflows

Multi-Form Workflows

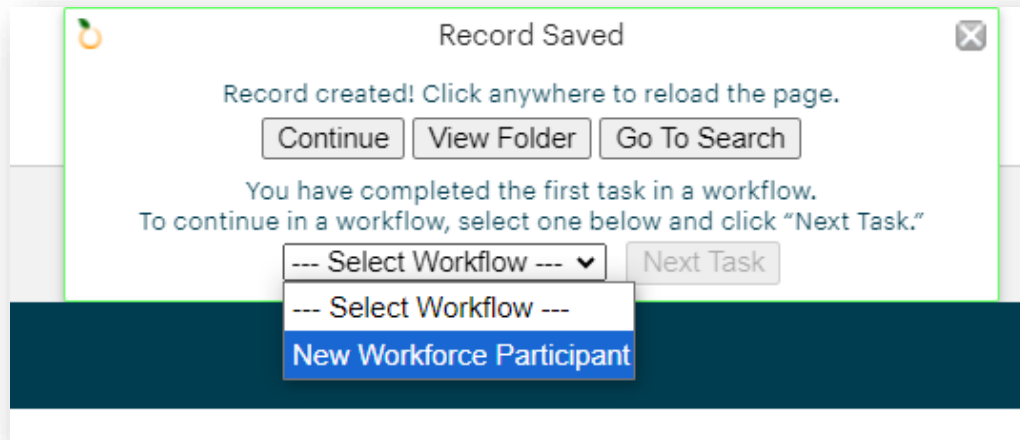
Process for Completing Related Forms in Order

Opportunities to Streamline:



Workflows

- Guide users through set list of form / tasks to complete
- Align to data entry process & minimize training required
- Triggered by creating or editing a Tier 1 record
- Saves progress if interrupted or paused mid-list
- Steps can be required or optional with instructions



Workflows

Administrator > Workflow Station > Workflow Builder

Step 1: Click [Create New Workflow]

Step 2: Choose a Category & Name.

Step 3: Add Initial Task (must be Tier 1).

Step 4: Add Additional Tasks.

Step 5: Configure Steps.

Step 6: Publish!

➤ In progress Workflows are managed from the **My Workflows** page under **My Apricot Tools**.

The screenshot displays the 'Test Workflow' interface. On the left, a list of 'Workflow Tasks' is shown:

1. CREATE Participant Profile*
2. CREATE Program Enrollment and Exit*
3. CREATE Individualized Service*

A 'Task Properties' dialog box is open for the first task, 'Step 1: Participant Profile'. It includes the following fields:

- Required
- Record Action: Create new record (dropdown menu)
- Notes: Please create a new Participant Profile the first time someone comes in for services. (text area)
- Characters remaining: 415
- Buttons: Delete, Apply

Red boxes highlight the gear icons for configuration on the task list and the dialog box.

Linking Forms

- Tactic that connects associated forms to be completed together & perhaps in order
- Consider using single form as home base with Wizard links to each additional step

Service Plan ▾

*Plan Start Date
01/01/2024 📅

*Plan Focus Area
Housing ▾

Planning Notes
Working to obtain stable, permanent housing for family

Goals ▾

Goal Tracking Hide Deactivated Links New

Goals	Link Info					
Goal Status ▾	Goal Category ▾	Goal ▾	Target Date ▾	Active ▾	Delete	Date ▾
In progress		Create budget to save for home down payment.	04/26/2024	<input checked="" type="checkbox"/>		Added on 09/19/2024

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

Individual Services ▾

Services Received Hide Deactivated Links New

Individualized Service	Link Info						
Service Date ▾	Service Type ▾	Funding Source ▾	Service Time in Hours ▾	Service Notes ▾	Active ▾	Delete	Date ▾
01/22/2024	Counseling - Individual Session	Grant	1.00	Meet to review current expenses and opportunities for saving	<input checked="" type="checkbox"/>		Added on 09/19/2024

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

Goals

Goals/Milestones Tracking ▾

*Start Date
09/19/2024 📅

Goal Status
 In progress
 Complete
 Abandoned

Goal Category
--Please Select-- ▾

Goal

*Target Date
MM/DD/YYYY 📅

Date Completed
MM/DD/YYYY 📅

COLLAPSE ALL

Record Options ▾
 Save Linked Record

Record Save Checklist ▾
Required Field Checks ✗
*Target Date
Field Validation Checks ✓

Tracking Report

- Build report(s) tracking completed or missing forms in process to prioritize next steps
- Feature as a report bulletin to give relevant staff easy access & daily reminder

Outgoing Referrals ▼ Pending Referrals

New Section
Report last run September 19th 2024, 11:53 am
[Click to refresh data](#)

► More Info Requested Row Count
2

▼ Sent / Pending Row Count
4

Search Displaying 4 of 4 Rows (Expand All Cells)

Participant	Referral Date	Agency Name	Referral Reason	Referral Notes	Referral Status
April Billingalea (34)	08/05/2024	Catholic Charities	Needs Other Services		Sent / Pending
Luis Ortiz (631)	07/12/2024	Grandma's Pantry	Needs Other Services	Has dietary restrictions we cannot meet.	Sent / Pending
Deandre Reynolds (685)	08/13/2024	Goodwill	Needs Other Services	Children need back to school clothes	Sent / Pending
Heather Lightfoot (687)	08/30/2024	Grandma's Pantry	We Do Not Have Space	We are out of food boxes for the week	Sent / Pending

Total Rows
6

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)

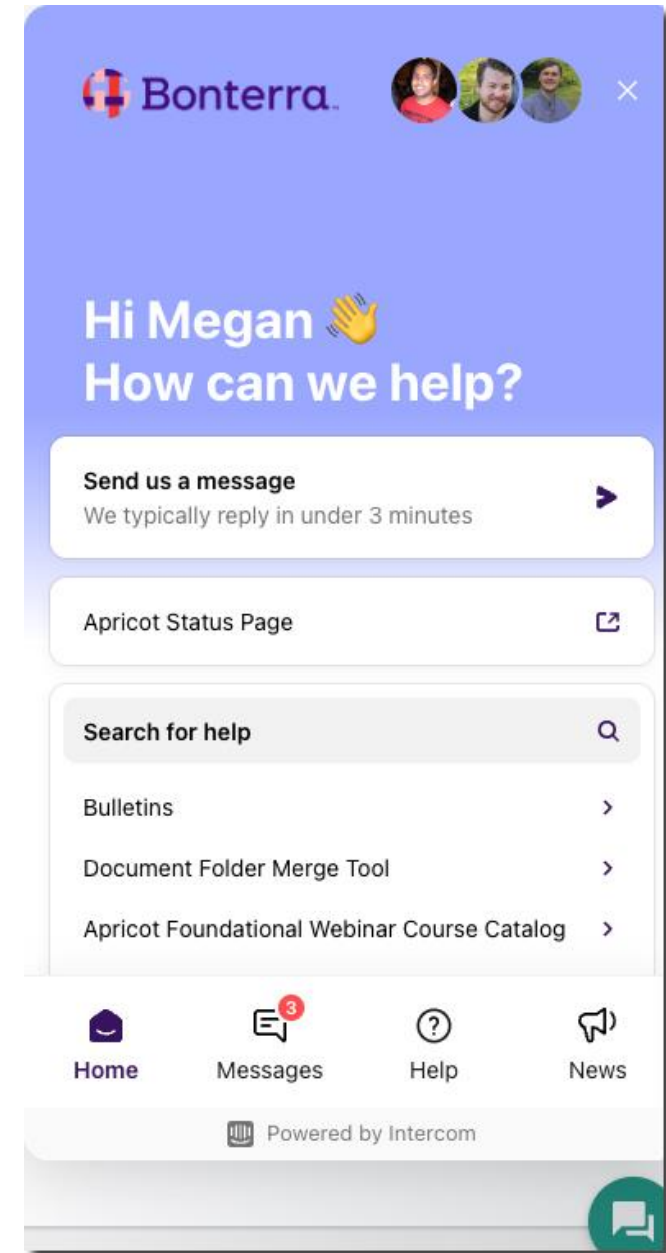


Build confidence & knowledge in
our software!

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



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.