Streamlining Staff Workflow

Welcome, we will start shortly!

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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.

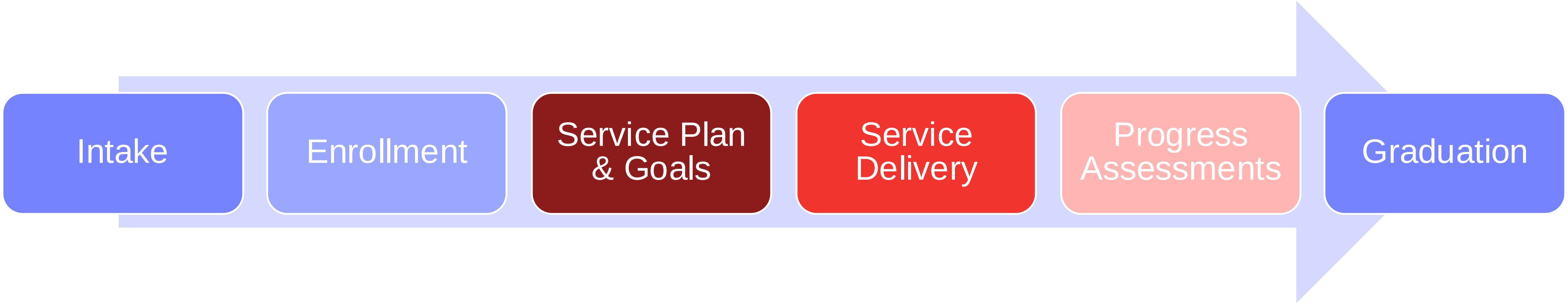
Agenda

- 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:

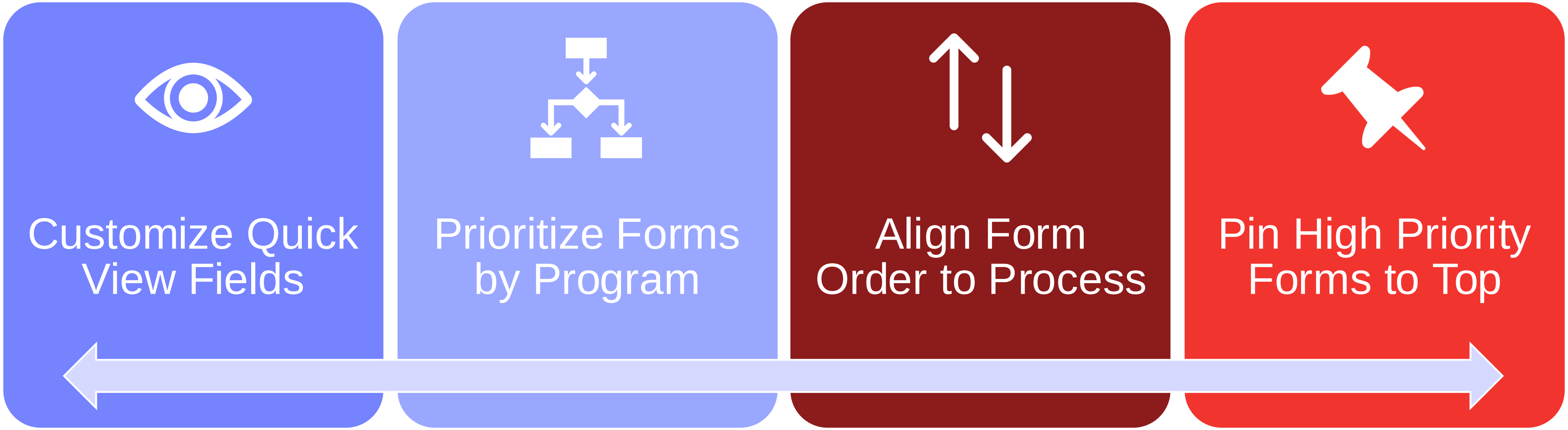
- How can you fit Apricot into the steps your staff are taking offline?
- Are there ways to improve our current processes with digital support?
- Can you improve your current Apricot Workflow to reduce barriers?

Document Folder Design

Document Folder Design

Information Hub for Each Participant

Opportunities to Streamline:



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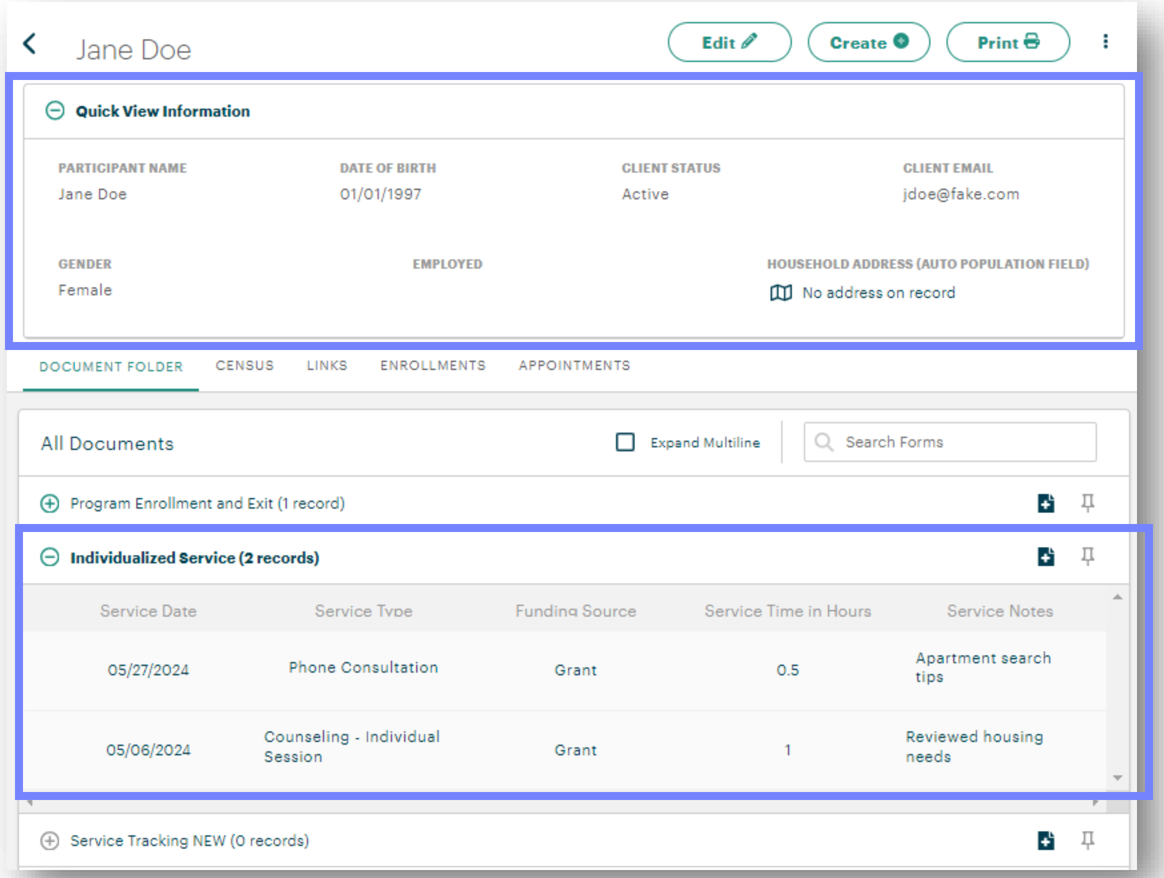
Quick View Fields

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 glace & supports finding the right record to open?*

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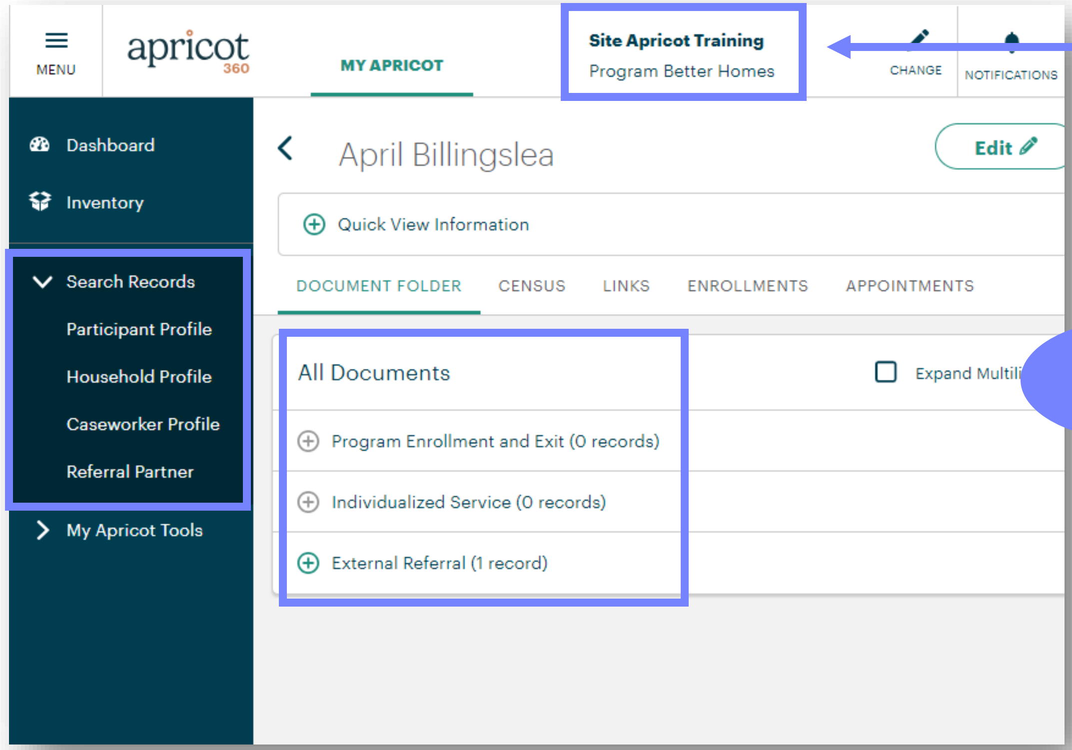
Prioritize Forms by Program

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



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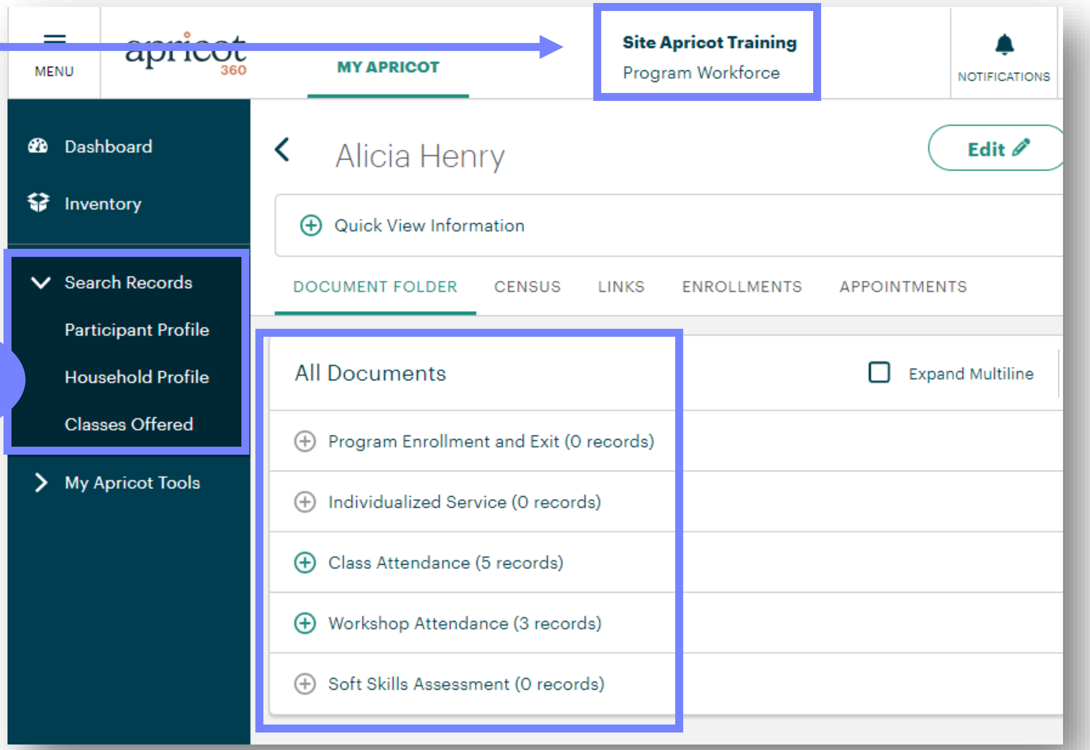
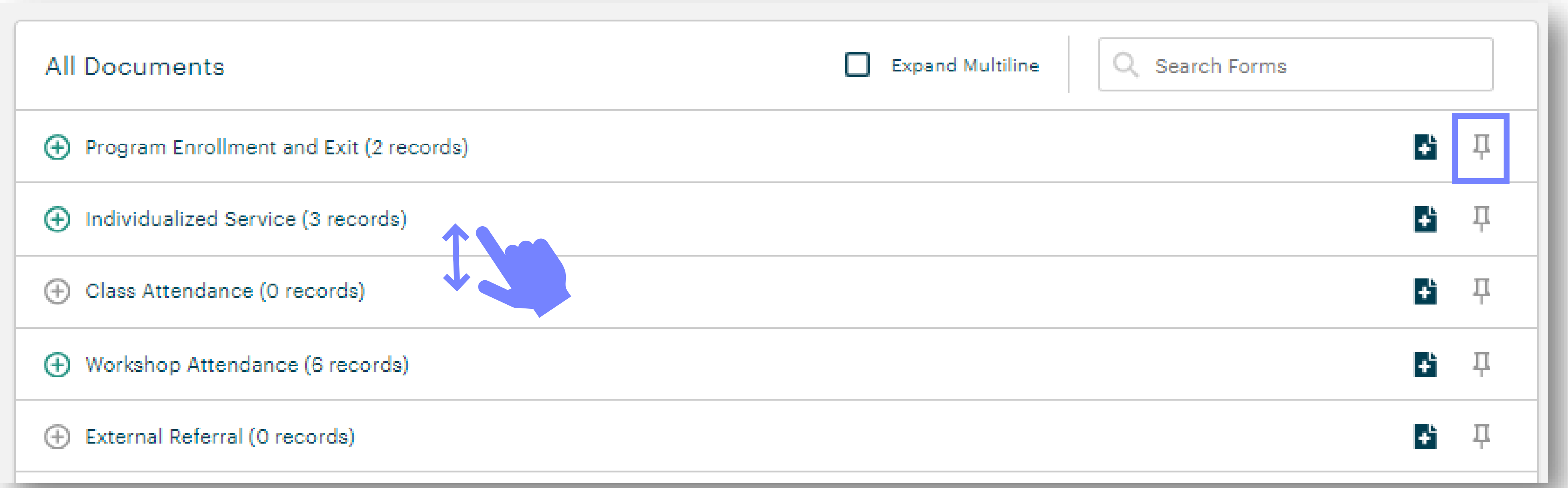


Order & Pin Tier 2 Forms

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



Single Form Optimization

Single Form Optimization

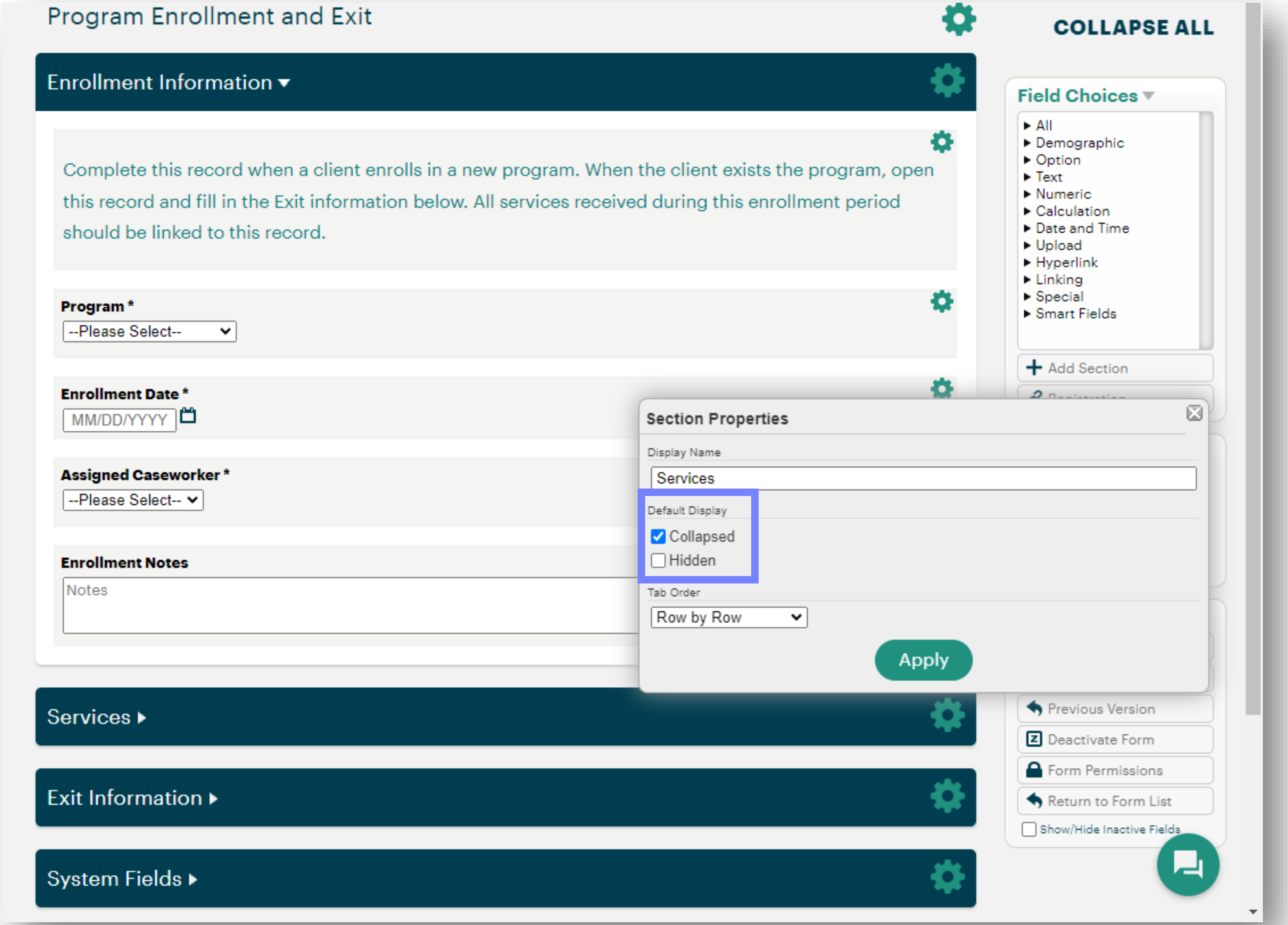
Process for Completing Individual Forms

Opportunities to Streamline:

- Organize into Sections
- Use Form Logic for Relevance
- Include Tips & Instructions
- Record Program Assignment

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



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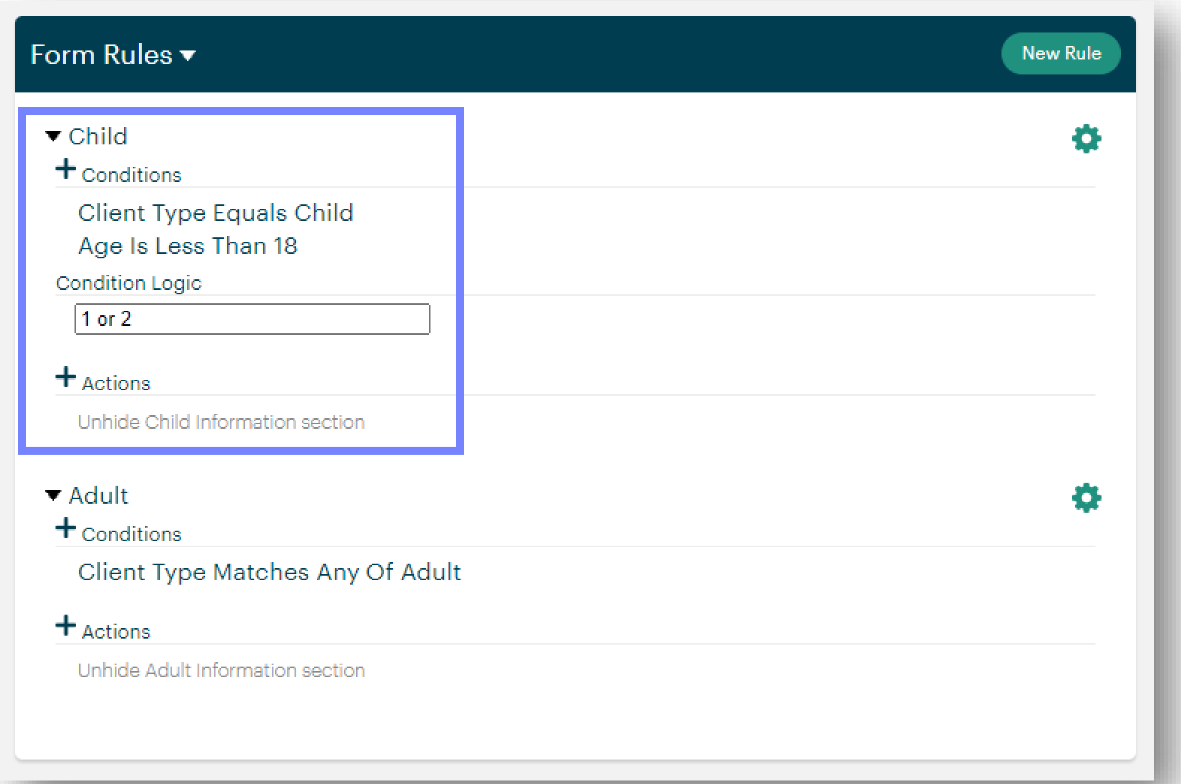
Form Logic for Relevance

- 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



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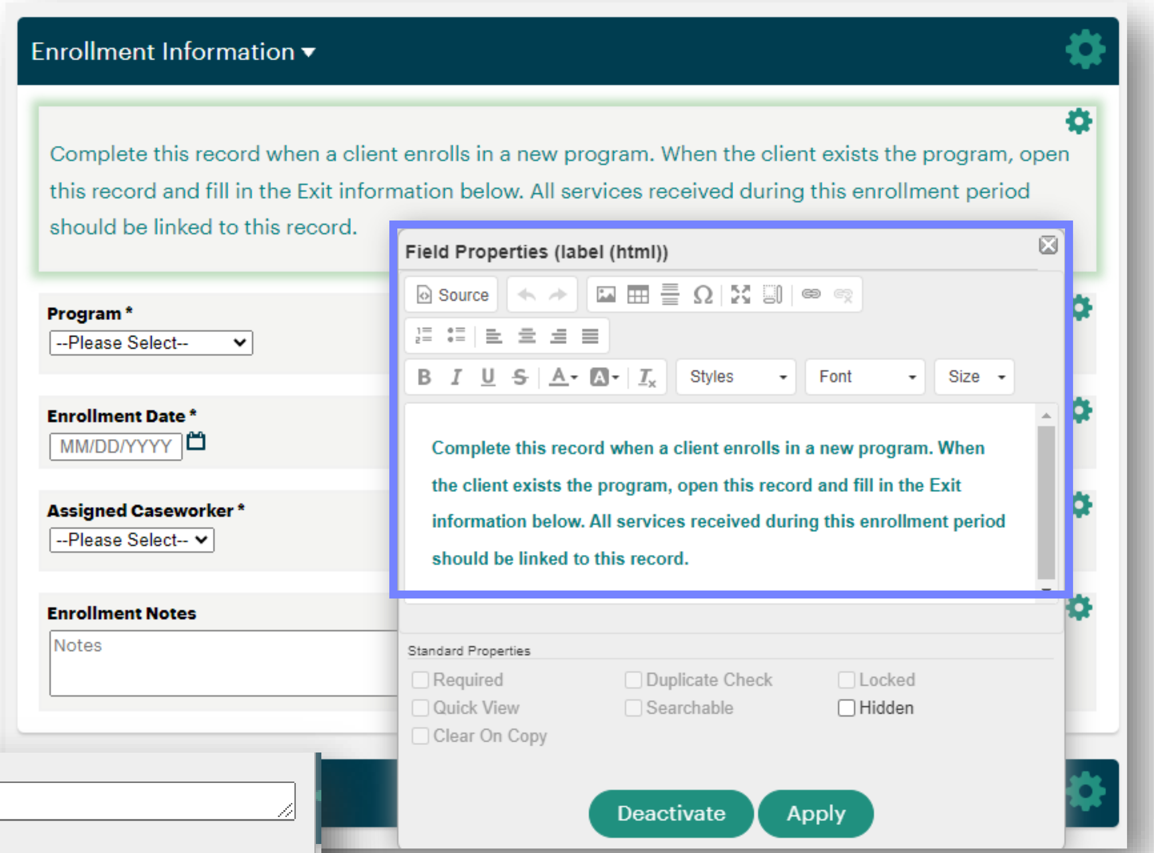
Include Tips & Instructions

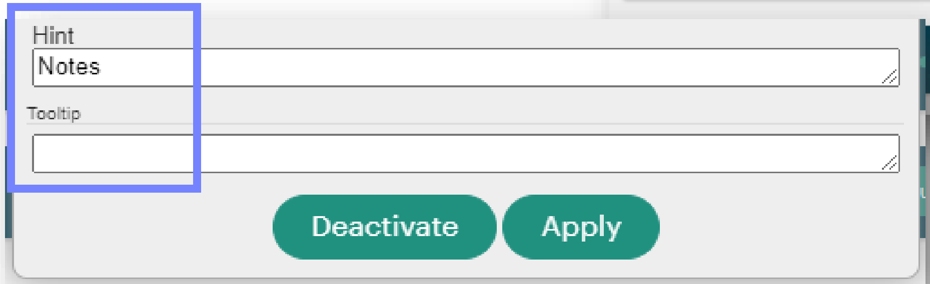
Label Fields:

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

Tool Tips & Hints:

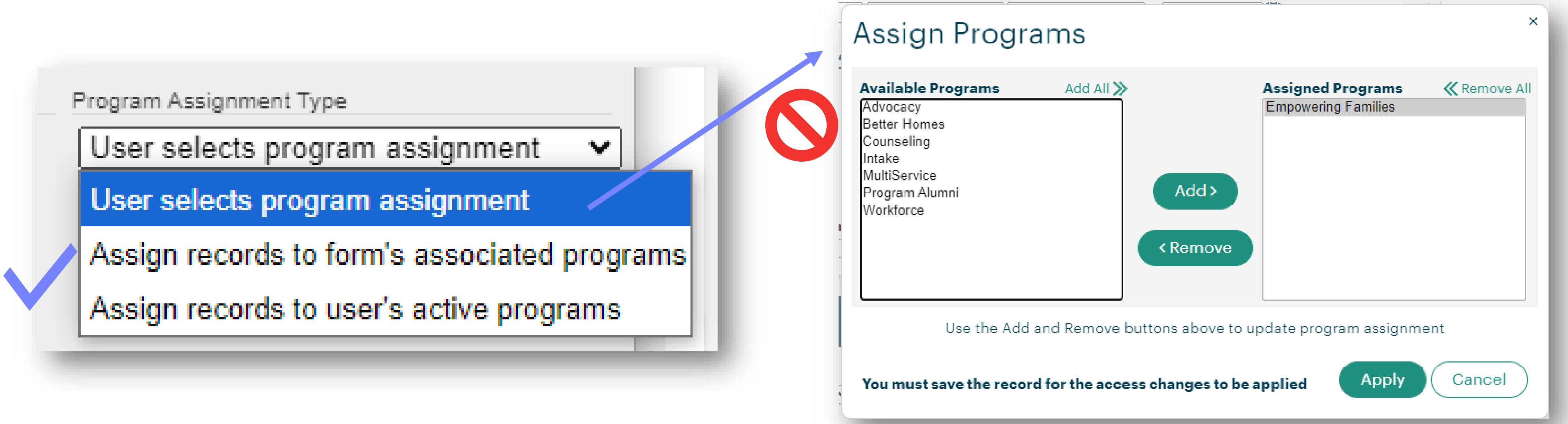
- Offer clarification & guidance by field
- Give example data





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.



Multi-Form Workflows

Multi-Form Workflows

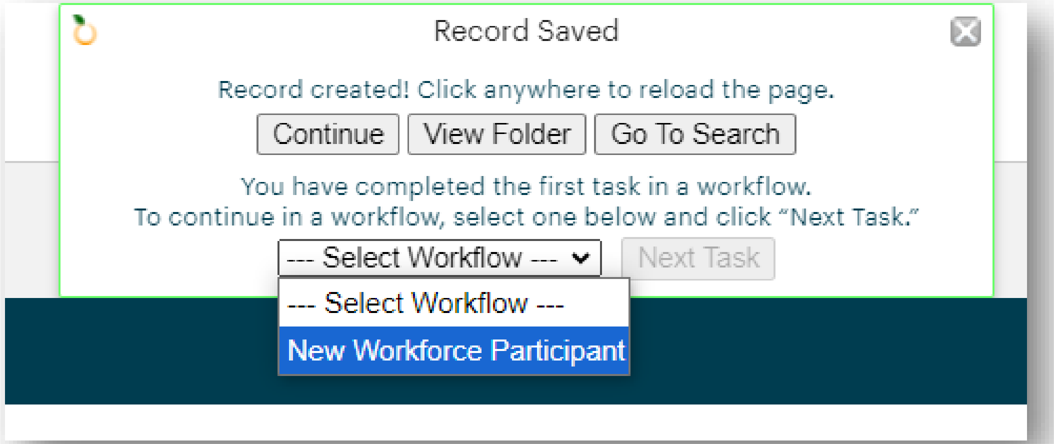
Process for Completing Related Forms in Order

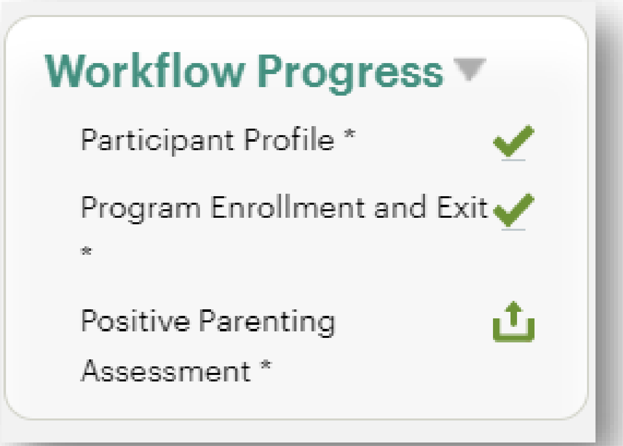
Opportunities to Streamline:

- Workflows Feature
- Links Connecting Forms
- Report Tracking Phases

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]

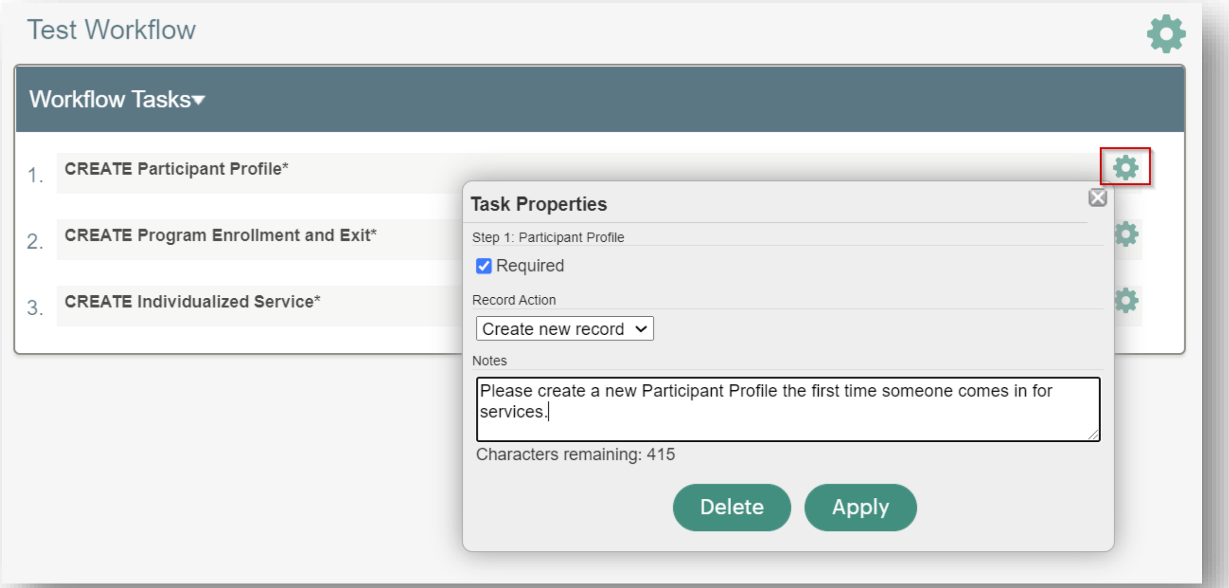
Step 2: Choose a Category & Name.

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**.

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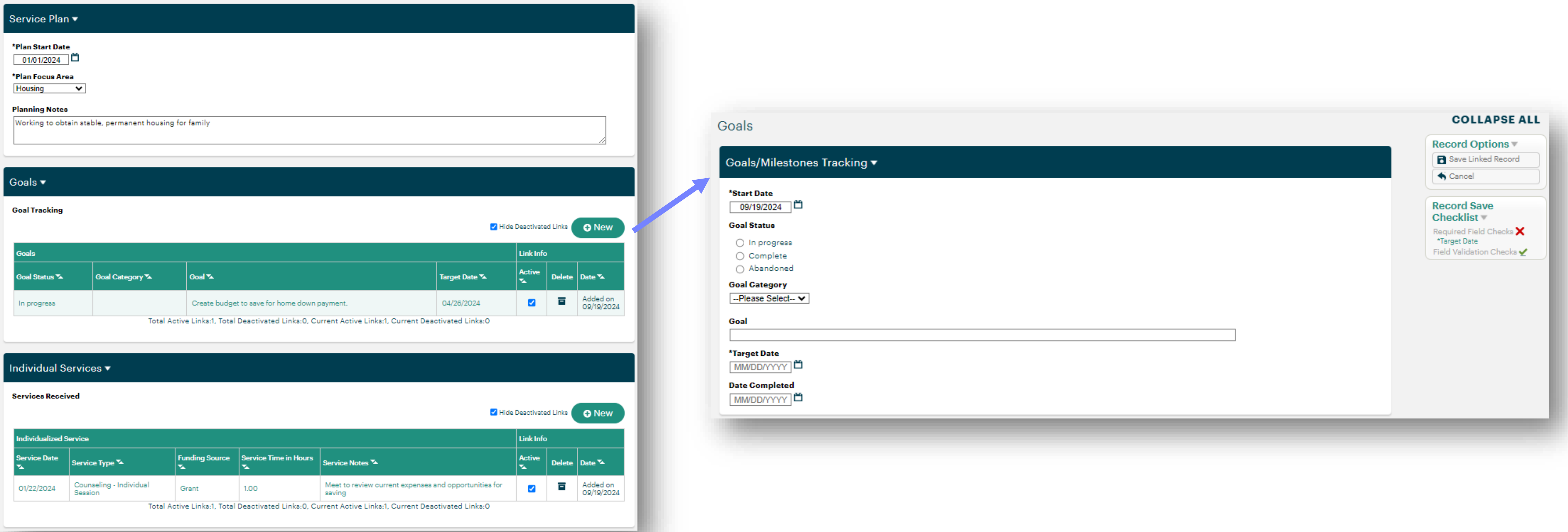
Linking Forms

- 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



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 Billingslea (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

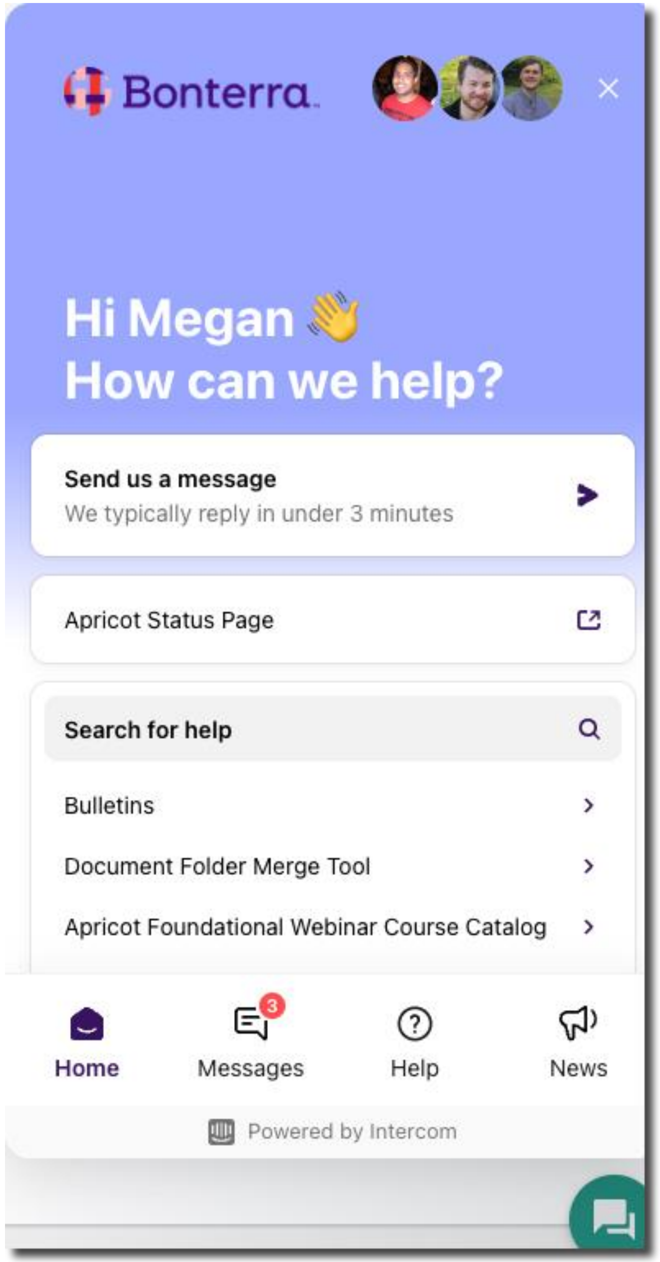
- Knowledge Base – How-To Articles (Search Chat or Visit Online)
- Bonterra Academy – Free Webinars & Recordings
- Foundations – Intensive, Multiday Courses to Cover Admin Basics
- Admin Labs – 2 Hour Live Trainings on Specific Capabilities
- Private Training – 1:1 Sessions with Training Expert in Your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



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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.

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