

Searching for Records/Record Access

Apricot Targeted Webinar

Meet Your Trainer

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Learning Objective

This training will cover:

- Searching Tier 1 Records
- Understanding Record Access

By the end of this session, the goal is for you to understand how to effectively search through Tier 1 Records and where to find and update record access in Apricot.

Agenda

Searching Tier 1 Records

Record Access by Program

Program Assignment

Searching Tier 1 Records

Search Records

- Easily locate records that meet criteria
- Recommended to avoid duplicate data entry
- Accessible on the 'My Apricot' tab
- Navigate to Search Records on left-hand side
- Select the Tier 1 Form you wish to search through

The screenshot displays the Apricot 360 web application interface. At the top, the logo 'apricot 360' is visible, along with a 'MENU' icon and the user's role 'ADMINISTRATOR'. A red circle with the number '1' highlights the 'MY APRICOT' tab. On the left-hand side, a dark teal navigation menu lists various options: Dashboard, Inventory, Search Records (highlighted with a red circle '2'), Household, Participant (highlighted with a red circle '3'), Class Profile, Staff/Volunteer Profile, Donor Profile, and Request for Services. The main content area is titled 'Participant' and features a 'Participant Search' section. This section includes a search input field with a dropdown menu set to '-- Add Search Field --' and a 'Browse All' link. Below the search field, a message states 'The following 8 Participant records are available'. A table displays the search results with two columns: 'Legal Name' and 'Preferred Name/Nickname'. The table contains the following data:

Legal Name	Preferred Name/Nickname
Sammy Costello	
Leo Dodds	Leo Son
Michael L Jones	
Leo W Morales	
Henry W Smith	
Rashida P Tray	
Molly Walker	
Maisy Zurcher	

Search Fields

- Search fields allow you to narrow down results
- Fields marked as “Searchable” will show up in this drop down
- Fields pulled from Tier 1 form and corresponding Tier 2 forms

Participant

Participant Search

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

The following 8 Participant records are available

Legal Name ▼	Preferred Name/Nickname ▼	Date Of Birth ▼	Monthly Income ▼
Sammy Costello		10/10/1999	\$2,500.00
Leo Dodds	Leo Son	05/15/1994	\$97,000.00
Michael L Jones		10/10/1999	\$47,000.00
Leo W Morales		06/06/2005	\$10,000.00
Henry W Smith		10/10/2010	\$68,000.00
Rashida P Tray		11/11/1990	\$88,000.00
Molly Walker		02/02/2004	\$94,000.00
Maisy Zurcher		04/15/1999	\$75,000.00

EXPAND ALL

Search Actions ▼

- + New Participant
- ✕ Clear Search History
- 🔒 Program Access
- ↔ Create Referral
- ↔ Show Enrollment Actions

Favorite Lists ▼

-- Select Favorite List -- ▼

Favorite Details ▼

Tier 1 Search Field

- Searched by “Legal Name” which is a field on the Tier 1 form
- You will now see a list of Participants that meet this criteria
- The mint text will take you directly into their Tier 1 record
- The grey text will take you to their document folder

Participant

Participant Search

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

Legal Name (Participant) [Clear Field](#)

First

Middle

Last

The following 8 Participant records matched your search criteria

Legal Name ▼	Preferred Name/Nickname ▼	Date Of Birth ▼	Monthly Income ▼
Sammy Costello		10/10/1999	\$2,500.00
Leo Dodds	Leo Son	05/15/1994	\$97,000.00
Michael L Jones		10/10/1999	\$47,000.00
Leo W Morales		06/06/2005	\$10,000.00
Henry W Smith		10/10/2010	\$68,000.00
Rashida P Tray		11/11/1990	\$88,000.00
Molly Walker		02/02/2004	\$94,000.00
Maisy Zurcher		04/15/1999	\$75,000.00

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.

Tier 2 Search Field

- Searched by “Program Enrolling” which is a field on a Tier 2 form
- You will now see a list of Participants that meet this criteria
- You can see all corresponding Tier 2 records
- The mint text will now take you into the Tier 2 record directly
- The grey text will take you to the document folder

Participant

Participant Search

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

Program Enrolling (Program Enrollment) [Clear Field](#)

Workforce Development

The following 1 Participant records matched your search criteria

	Legal Name	Preferred Name/Nickname	Date Of Birth	Monthly Income
1	Leo Dodds	Leo Son	05/15/1994	\$97,000.00

Displaying 1 Program Enrollment record. [More Columns...](#)

Program Enrolling	Site	Start Date	Exit Date
Workforce Development	Main Office	02/15/2024	

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.

Considerations

- If you are unsure of the exact spelling, use a wildcard value (%) before, after, or around the characters

Participant

Participant Search

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

Legal Name (Participant) [Clear Field](#) ✕

Middle Last

The following 4 Participant records matched your search criteria

Legal Name ▼	Preferred Name/Nickname ▼	Date Of Birth ▼	Monthly Income ▼
Sammy Costello		10/10/1999	\$2,500.00
Michael L Jones		10/10/1999	\$47,000.00
Rashida P Tray		11/11/1990	\$88,000.00
Maisy Zurcher		04/15/1999	\$75,000.00

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.

Considerations

- By default, the Search Records remembers your previous search criteria – use the Clear Search History on the right to remove the fields

Search Actions ▼

 New Participant

 Clear Search History

 Program Access

 Create Referral

 Show Enrollment Actions

Record Access

Record Access by Program

- Apricot can have multiple programs
- When a new Tier 1 record is created, it is assigned to a program
- The program you are in will dictate the records you have access to

The screenshot displays the Apricot system interface. At the top, there is a header with the text "All Sites" and "Program All Programs". To the right of this header is a red-bordered button with a pencil icon and the word "CHANGE". Below the header is a dark navigation bar. A white dropdown menu titled "Sites & Programs" is open, showing a search bar and a list of programs: "All Sites & Programs", "Megan's Training Site", "Counselling", "Extrajudicial Sanctions", "Housing & Food Pantry", "Intake", "Workforce Development", and "Youth Services". At the bottom of the screen, there are links for "Reporting | Table of Contents" and "Self Service Tools | Setting up Connect".

Program Assignment

- You may manually assign programs using the “Assigned Programs” button
- The record may automatically be assigned to the site that you are logged into (shown in the middle of your Apricot top bar)

ot 360 MY APRICOT ADMINISTRATOR

Site Megan's Training Site
Program Counselling

CHANGE Megan Dodds
Megan's Apricot 360 (117741)

Assign Programs

Available Programs Add All >>

Extrajudicial Sanctions
Housing & Food Pantry
Intake

Assigned Programs << Remove All

Counselling

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

Record Options ▾

Save Record
New Participant
Go To Search

Assigned Programs ▾

(New) Counselling
Program Access

Record Save Checklist ▾

Required Field Checks ✕

- *Legal Name
- *Date of Birth
- *Pronouns
- *Race
- *Ethnicity
- *Gender Identity
- *Primary Language

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)

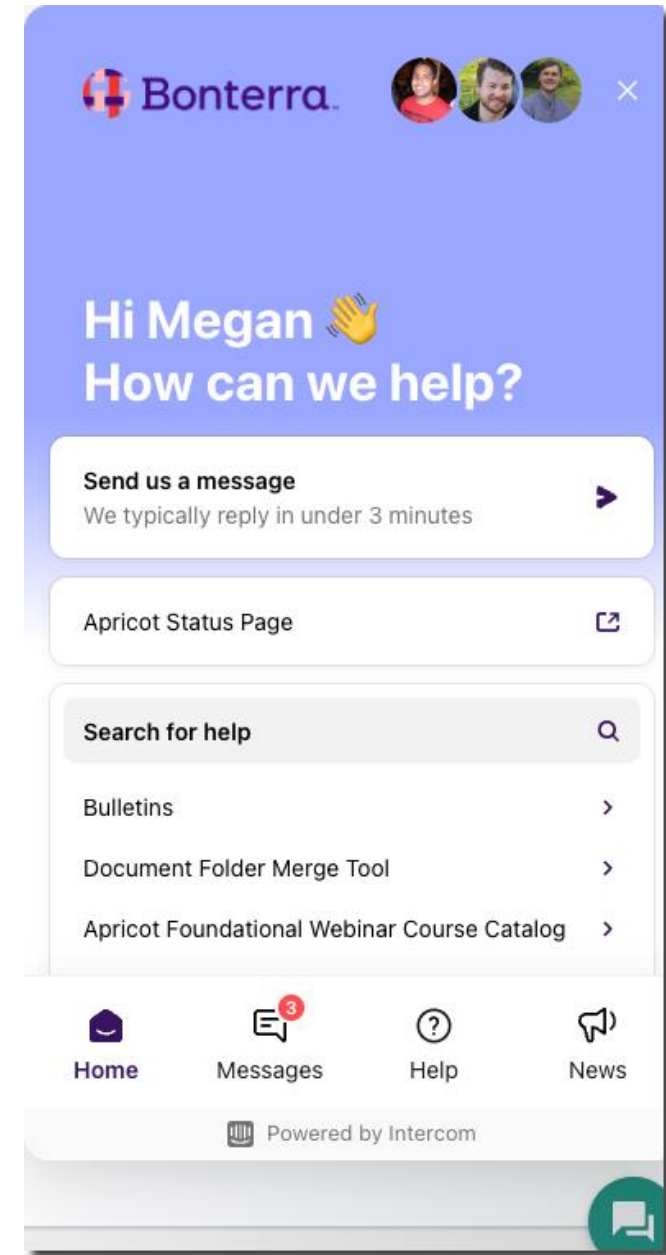


Build confidence & knowledge in
our software!

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.