

Apricot Getting Staff Buy-in Webinar

Meet Your Trainer

First Name Last Name

Training & Development Associate

Learning Objective

To provide tips, best practices and suggestions for making Bonterra Case Management more user friendly for your staff so that it's easier to encourage your team to use the software.

Agenda

Field Properties

Form Properties

Email Triggers

Report Ideas for Staff

Field Properties

Field Properties

Make Viewing Existing Data Easier

- Searchable
- Quick View

Field Properties (phone)

Display Name
Client Phone Number

Standard Properties

Required Quick View **2** Duplicate Check Searchable **1** Locked
 Restricted Clear On Copy Hidden

Special Properties

Format
US

Tooltip

Deactivate Apply

Field Properties - Searchable

- Show in Record Search dropdown

The screenshot shows a web application interface. On the left is a dark blue sidebar menu with the following items: Search Records (expanded), Incoming Referral, Participant Profile (highlighted in orange), Household Profile, Caseworker Profile, Classes Offered, Staff Profile, My Apricot Tools (with a right arrow), Customer Care (with a headset icon), and Help Center (with a question mark icon). The main content area is titled 'Participant Profile' and contains a 'Participant Profile Search' dropdown menu. The dropdown is open, showing a search field with the text '-- Add Search Field --' and a 'Browse All' button. Below the search field, it says 'Showing 1 - 20 of 60 available Participant Profile records' and 'More Columns...'. A table of records is displayed below the search field.

Participant Name	Date Of Birth	Client Status	Client Email
Adam Voght	09/21/1987		adamv@officemail.com
Alicia Henry	08/19/1965	Active	henry.alicia@ymail.com
Alonzo LaBarca	04/03/1998	Active	alonzorocks@mymail.com
Alonzo LaBatsille	03/04/1998	Active	AlonzoL@gmail.com
Alvy Singer	10/01/1978	pending	alvy.singer@gmail.com
Andrew Jones	05/16/1985	Active	aj@ymail.com
April Billingslea	04/15/1982	Active	aprilb@yahoo.com
Asher Billingslea	06/09/1984	Active	abillingslea@gmail.com
Ashton Carter	06/12/2003	pending	ashton@mymail.com
Austin Hill	11/18/1997	Active	

Field Properties - Searchable

- Show in Record Search dropdown
- Include Tier 1 & Tier 2 fields

Participant Profile

Participant Profile Search

-- Add Search Field -- Browse All

-- Add Search Field --

Participant Profile

- Participant Name
- Date of Birth
- Client Status
- How did you hear about us?
- Client Phone Number
- Client Email
- Gender
- Employed
- Household Address (Auto Population Field)

Goals

- Start Date
- Goal Status
- Goal Category
- Goal

Individual Service Plan (ISP)

- Date Service Plan Created
- Plan Title
- Presenting Problems, Challenges, Needs

Tier 1 Fields

Tier 2 Fields

Austin Hill	11/18/1997	Active
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Field Properties - Searchable

- Show in Record Search dropdown
- Include Tier 1 & Tier 2 fields
- Gives Record Search practical application (example: creating invite list for job fair)

The screenshot displays the 'Participant Profile' search interface. On the left is a dark sidebar with navigation options: Search Records (expanded), Incoming Referral, Participant Profile (highlighted), Household Profile, Caseworker Profile, Classes Offered, Staff Profile, My Apricot Tools, Customer Care, and Help Center. The main content area is titled 'Participant Profile' and contains a search section. The search criteria are set to 'Goal Category (Goals)' with 'Employment' selected. Below the search bar, a message states 'The following 8 Participant Profile records matched your search criteria'. A table lists these records, with the record for 'Cherise Alexander' expanded to show a detailed 'Goals' record. This detailed record is also highlighted with an orange border.

...	Participant Name	Date Of Birth	Client Status	Client Email	Gender
▶ 1	April Billingslea	04/15/1982	Active	aprilb@yahoo.com	Nonbinary
▶ 1	Beth Crane	06/04/1974	Active	b.crane@gmail.com	Nonbinary
▼ 1	Cherise Alexander	02/28/1969	Active		Female

Displaying 1 Goals record.

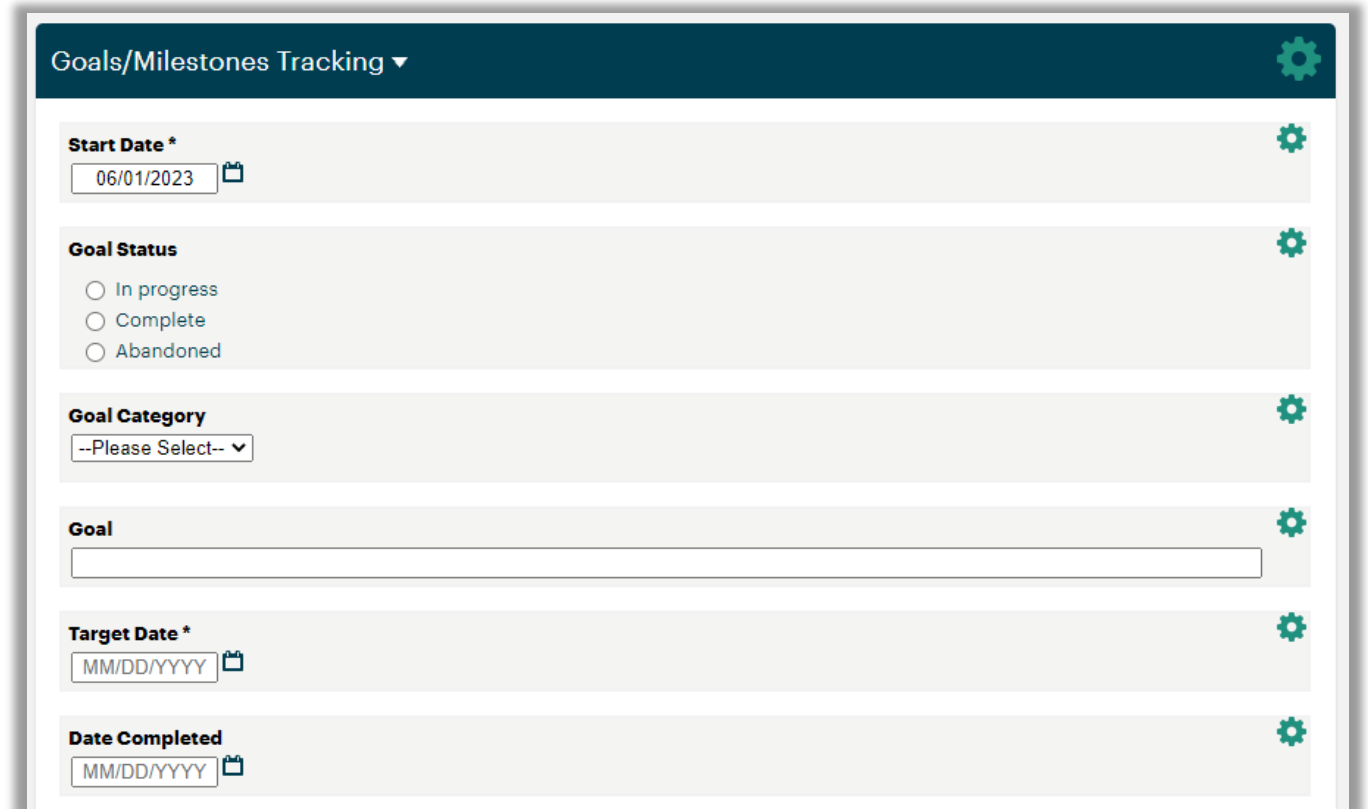
Goal Category	Goal Status	Goal	Target Date
Employment	In progress	Secure Stable Employment	06/30/2023

▶ 1	Jimmy Aquino	12/26/1983	Active	jimmy@fakemail.com	Male
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Field Properties - Searchable

Steps

1. Open desired form in Edit view



The screenshot displays a form titled "Goals/Milestones Tracking" with a dark teal header bar containing a gear icon. The form is divided into several sections, each with a gear icon on the right side for configuration:

- Start Date ***: A date input field containing "06/01/2023" and a calendar icon.
- Goal Status**: A section with three radio button options: "In progress", "Complete", and "Abandoned".
- Goal Category**: A dropdown menu currently showing "--Please Select--".
- Goal**: A single-line text input field.
- Target Date ***: A date input field with the placeholder "MM/DD/YYYY" and a calendar icon.
- Date Completed**: A date input field with the placeholder "MM/DD/YYYY" and a calendar icon.

Field Properties - Searchable

Steps

1. Open desired form in Edit view
2. Open Field Properties for desired field
3. Check box next to the Searchable option
4. Click Apply
5. Publish to save changes

The screenshot shows a form in edit view with a 'Field Properties (dropdown)' dialog box open. The dialog box has a title bar with a close button. Below the title bar, the 'Display Name' is 'Goal Category'. Under 'Standard Properties', the 'Searchable' checkbox is checked and highlighted with a red box and the number '3'. Other options include 'Required', 'Duplicate Choice', 'Locked', 'Restricted', 'Hidden', and 'Clear On Copy'. Under 'Field Choices', there is a list of categories: Employment, Education, Housing, Transportation, and Relationships. At the bottom of the dialog, there are 'Bulk Entry', 'Deactivate', and 'Apply' buttons. The 'Apply' button is highlighted with a red box and the number '4'. A callout box with the text 'Click to open Field Properties' and the number '2' points to a gear icon on the right side of the form. The form background shows fields for 'Start Date', 'Goal Status', 'Goal Category', 'Goal', 'Target Date', 'Date Completed', and 'Reason goal was abandoned'.

Field Properties – Quick View

- Makes viewing data easier



Field Properties – Quick View

- Makes viewing data easier
- Tier 1 data shows on Record Search
 - What might help make search practical?

Participant Profile

Participant Profile Search

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

Showing 1 - 20 of 60 available Participant Profile records [More Columns...](#)

Participant Name ▼	Date Of Birth ▼	Client Status ▼	Client Email ▼
Adam Voght	09/21/1987		adamv@officemail.com
Alicia Henry	08/19/1965	Active	henry.alicia@ymail.com
Alonzo LaBarca	04/03/1998	Active	alonzorocks@mymail.com
Alonzo LaBatsille	03/04/1998	Active	AlonzoL@gmail.com

Field Properties – Quick View

- Makes viewing data easier
- Tier 1 data shows on Record Search
 - What might help make search practical?
- Tier 2 data shows preview in Document Folder
 - What might help staff prepare to meet with client?

Alicia Henry

DOCUMENT FOLDER OVERVIEW LINKS ENROLLMENTS APPOINTMENTS

All Documents Expand Multiline

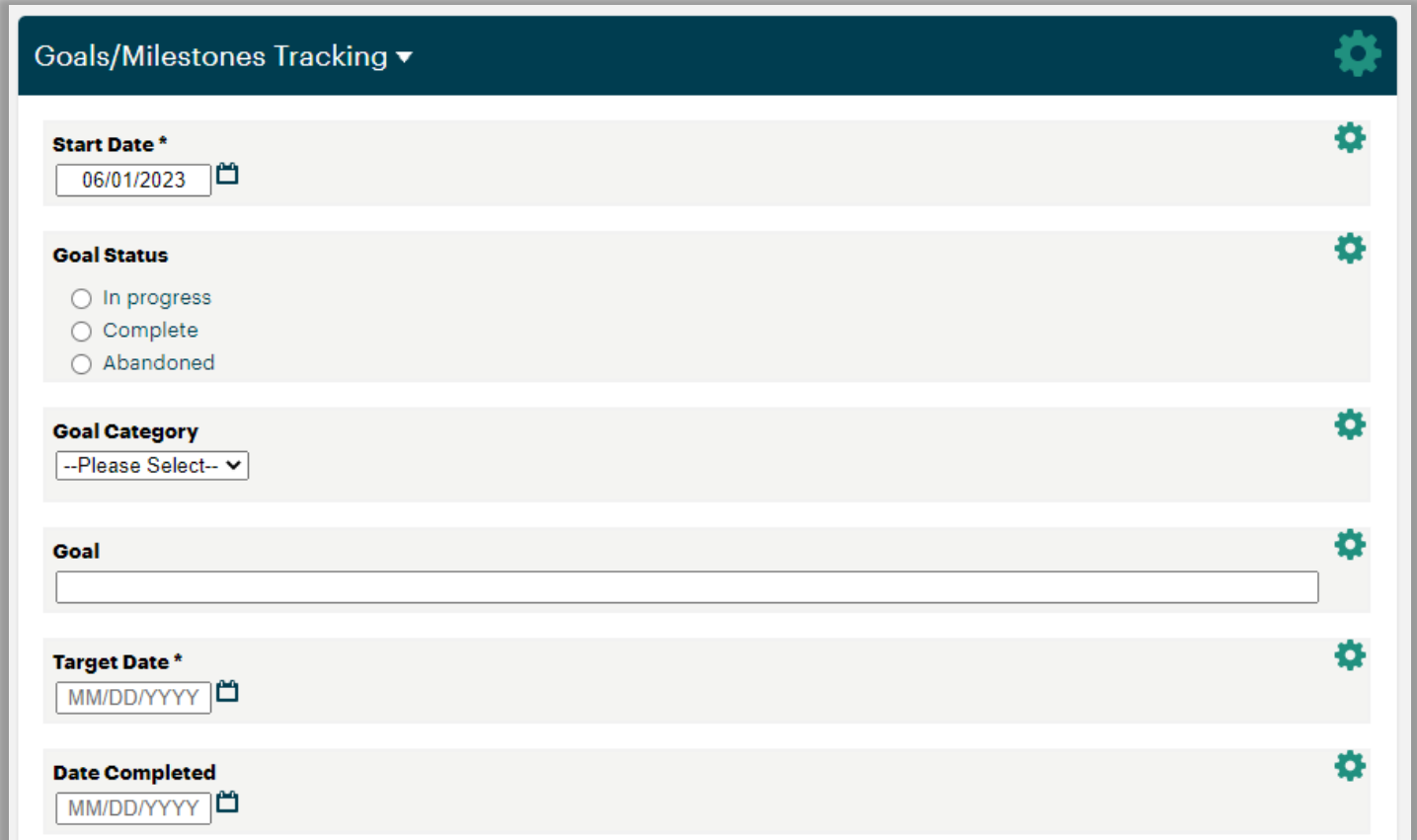
Services (3 records)

SERVICE DATE	SERVICE TYPE	FUNDING SOURCE	SERVICE TIME IN HOURS	SERVICE NOTES
05/10/2023	Family Coaching	SSG	2.5	Introduced family to gentle parenting approach. Explained Read More
05/05/2023	Family Coaching	SSG	2.5	First family coaching session. Family seeking support to help get o Read More

Field Properties – Quick View

Steps:

1. Open desired form in edit view



The screenshot displays a form titled "Goals/Milestones Tracking" with a dark teal header bar containing a gear icon. The form is divided into several sections, each with a gear icon on the right side for configuration:

- Start Date ***: A date input field containing "06/01/2023" and a calendar icon.
- Goal Status**: Three radio button options: "In progress", "Complete", and "Abandoned".
- Goal Category**: A dropdown menu with the text "--Please Select--".
- Goal**: A single-line text input field.
- Target Date ***: A date input field with the placeholder "MM/DD/YYYY" and a calendar icon.
- Date Completed**: A date input field with the placeholder "MM/DD/YYYY" and a calendar icon.

Field Properties – Quick View

Steps:

1. Open desired form in edit view
2. Open the Field Properties
3. Check the box next to Quick View
4. Click Apply
5. Publish Form

The screenshot shows a 'Field Properties (dropdown)' dialog box overlaid on a form. The dialog box has a title bar with a close button. Below the title bar, the 'Display Name' is 'Goal Category'. Under 'Standard Properties', the 'Quick View' checkbox is checked and highlighted with a red circle and the number '3'. Other checkboxes include 'Required', 'Restricted', 'Duplicate Check', 'Searchable', 'Clear On Copy', 'Locked', and 'Hidden'. The 'Field Choices' section lists 'Employment', 'Education', 'Housing', 'Transportation', and 'Relationships'. At the bottom of the dialog, the 'Apply' button is highlighted with a red circle and the number '4'. A red callout box with the text 'Click to open Field Properties' and a red circle with the number '2' points to a gear icon in the top right corner of the form. The form background shows fields for 'Start Date *' (06/01/2023), 'Goal Status' (In progress, Complete, Abandoned), 'Goal Category' (--Please Select--), 'Goal', 'Target Date *' (MM/DD/YYYY), 'Date Completed' (MM/DD/YYYY), and 'Reason goal was abandoned' (--Please Select--).

Form Properties

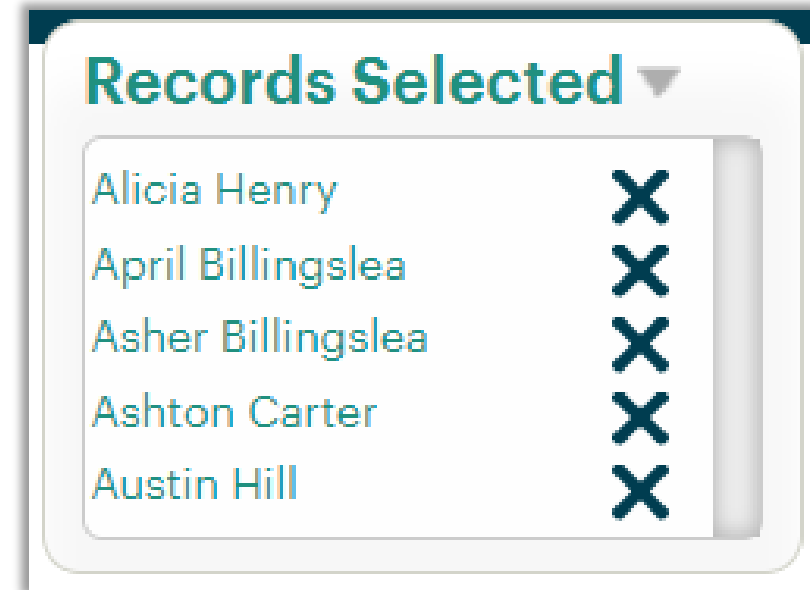
Form Properties – Batch Records

- Simplifies data entry



Form Properties – Batch Records

- Simplifies data entry
- Track interaction with multiple participants all at once



Form Properties – Batch Records

- Simplifies data entry
- Track interaction with multiple participants all at once
- Accessed via Record search

Participant Profile

Participant Profile Search

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

Showing 1 - 20 of 60 available Participant Profile records [More Columns...](#)

Participant Name	Date Of Birth	Client Status	Client Email	Gender	Employed
Adam Voght	09/21/1987		adamv@officemail.com	Female	No
Alicia Henry	08/19/1965	Active	henry.alicia@ymail.com	Female	Yes
Alonzo LaBarca	04/03/1998	Active	alonzorocks@mymail.com	Male	No
Alonzo LaBatsille	03/04/1998	Active	AlonzoL@gmail.com	Male	Yes
Alvy Singer	10/01/1978	pending	alvy.singer@gmail.com	Male	Yes
Andrew Jones	05/16/1985	Active	aj@ymail.com	Male	Yes

EXPAND ALL

Search Actions

- + New Participant Profile
- X Clear Search History
- Program Access
- Merge Folders
- Create Referral
- Show Enrollment Actions

Create Batch Records

- Services
- Class Attendance

Form Properties – Batch Records

- Simplifies data entry
- Track interaction with multiple participants all at once
- Accessed via Record search
- Data applies to all participants selected
- Update unique data via document folder

The screenshot displays the 'Services' form interface. The main form area is titled 'Service Information' and contains the following fields:

- *Service Date:** 05/30/2023
- *Service Type:** Counseling - Group Session
- *Funding Source:** SSG
- *Service Time in Hours:** 2.5

An orange callout box points to the form fields with the text: "Data applies to everyone >".

On the right side of the interface, there is a 'COLLAPSE ALL' button and a 'Record Options' panel with the following actions:

- Pick Participant Profiles
- Save Services
-
-

Below the 'Record Options' panel is a 'Records Selected' list:

Records Selected	
Alicia Henry	X
April Billingslea	X
Asher Billingslea	X
Ashton Carter	X
Austin Hill	X

Required fields are indicated with an * and must be populated prior to saving the record.

Form Properties – Batch Records

Steps:

1. Open desired form in edit view

The screenshot displays the 'Services' form in edit view. The form is organized into sections, each with a gear icon for configuration. The 'Service Information' section is expanded, showing several fields:

- Service Information** (Section Header): Includes a note: "This form should be completed when a client receives any individualized service."
- Service Date ***: A date field with a calendar icon and the placeholder "MM/DD/YYYY".
- Service Type ***: A dropdown menu with "--Please Select--" as the selected option.
- Funding Source ***: A dropdown menu with "--Please Select--" as the selected option.
- Service Time in Hours ***: A numeric input field with the value "0.0".

The 'Service Notes' section is also visible at the bottom of the form, with a gear icon for configuration.

Form Properties – Batch Records

Steps:

1. Open desired form in edit view
2. Open the Form Properties
3. Check the box next to the Allow Batch Record Creation option
4. Click Apply
5. Publish your changes

The screenshot shows the 'Form Properties (Participant Profile Tier 2)' dialog box overlaid on a form editor. The dialog contains the following fields and options:

- Form Name:** Services
- Description:** (empty text area)
- Settings:**
 - Allow Batch Record creation? (Callout 3)
 - Allow Copies
 - Record Limit
 - Hide from Document Folder
 - Enable Form Logic
- Program Assignment Type:** User selects program assignment
- Record Name Field:** Service Date
- Blueprint Form Tag:** -- Please Select --
- Quick View Fields:**
 - Service Date
 - Service Type
 - Service Time in Hours
 - Funding Source
 - Service Notes
- Searchable Fields:**
 - Service Date
 - Service Type
 - Funding Source
- History:**
 - First published by: Shelly Johnson
 - Last published by: Sabrina Gilbert
- Apply** button (Callout 4)

Callout 2 points to a gear icon in the top right corner of the dialog, with the text: "Click to open Form Properties".

Form Properties – Record Copy

- Save Time



Form Properties – Record Copy

- Save Time
- Copies previous responses



Form Properties – Record Copy

- Save Time
- Copies previous responses
- Commonly used for pre/post assessments

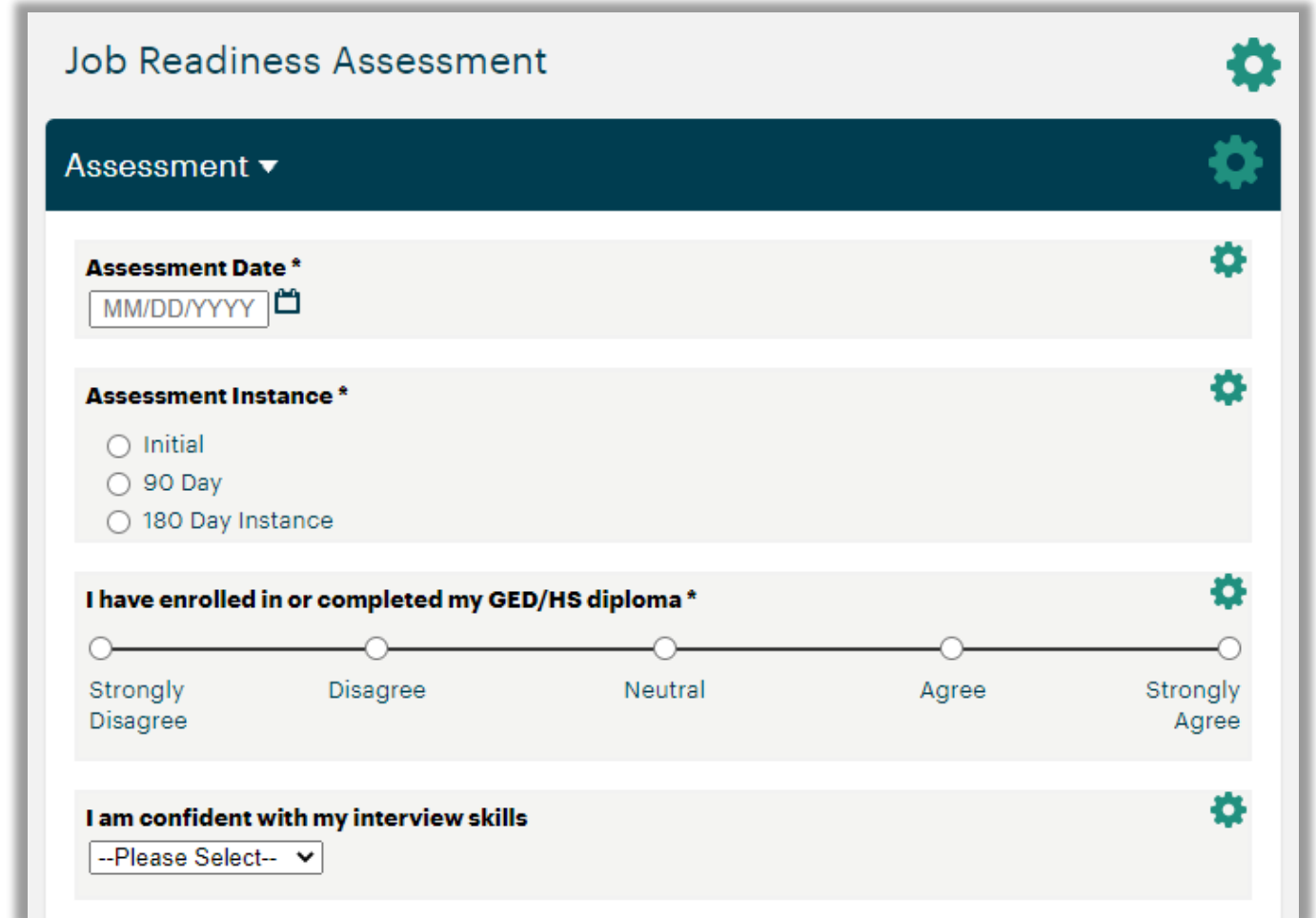
The screenshot shows a user profile page for Sharon Matthews. At the top, there are navigation tabs: DOCUMENT FOLDER (selected), OVERVIEW, LINKS, ENROLLMENTS, and APPOINTMENTS. To the right of the name are buttons for Edit, Create, and Print. Below the tabs, there is a section for 'All Documents' with an 'Expand Multiline' checkbox and a 'Search Forms' input field. Two document folders are listed: 'Enrollment and Exit Details (1 record)' and 'Job Readiness Assessment (2 records)'. The 'Job Readiness Assessment' folder is expanded, showing a table with the following data:

ASSESSMENT DATE	ASSESSMENT INSTANCE	JOB READINESS SCORE
02/14/2023	90 Day	8
11/15/2022	Initial	5

Form Properties – Record Copy

Steps

1. Open desired form in edit view



The screenshot displays the 'Job Readiness Assessment' form in edit view. The form is titled 'Job Readiness Assessment' and includes a gear icon for settings. Below the title is a dark blue header with the text 'Assessment' and a dropdown arrow, also with a gear icon. The form contains four sections, each with a gear icon for settings:

- Assessment Date ***: A text input field with the placeholder 'MM/DD/YYYY' and a calendar icon.
- Assessment Instance ***: A radio button selection with three options: 'Initial', '90 Day', and '180 Day Instance'.
- I have enrolled in or completed my GED/HS diploma ***: A horizontal scale with five points: 'Strongly Disagree', 'Disagree', 'Neutral', 'Agree', and 'Strongly Agree'.
- I am confident with my interview skills**: A dropdown menu with the placeholder '--Please Select--'.

Form Properties – Record Copy

Steps

1. Open desired form in edit view
2. Open the Form Properties
3. Check the box next to Allow Copies
4. Click Apply
5. Enable Clear On Copy property on necessary fields
6. Publish Form

MENU

Form Properties (Incoming Referral Tier 2)

Form Name
Job Readiness Assessment

Description

Settings

Allow Batch Record creation?

Allow Copies

Record Limit

Hide from Document Folder

Enable Form Logic

Record Name Field
Assessment Instance

Blueprint Form Tag
--- Please Select ---

Quick View Fields

- Assessment Date
- Assessment Instance
- Job Readiness Score

Searchable Fields

History

First published by: Sabrina Gilbert
Last published by: Sabrina Gilbert

Apply

Click to open Field Properties

2

3

4

Form Properties – Record Copy

Data Entry Steps

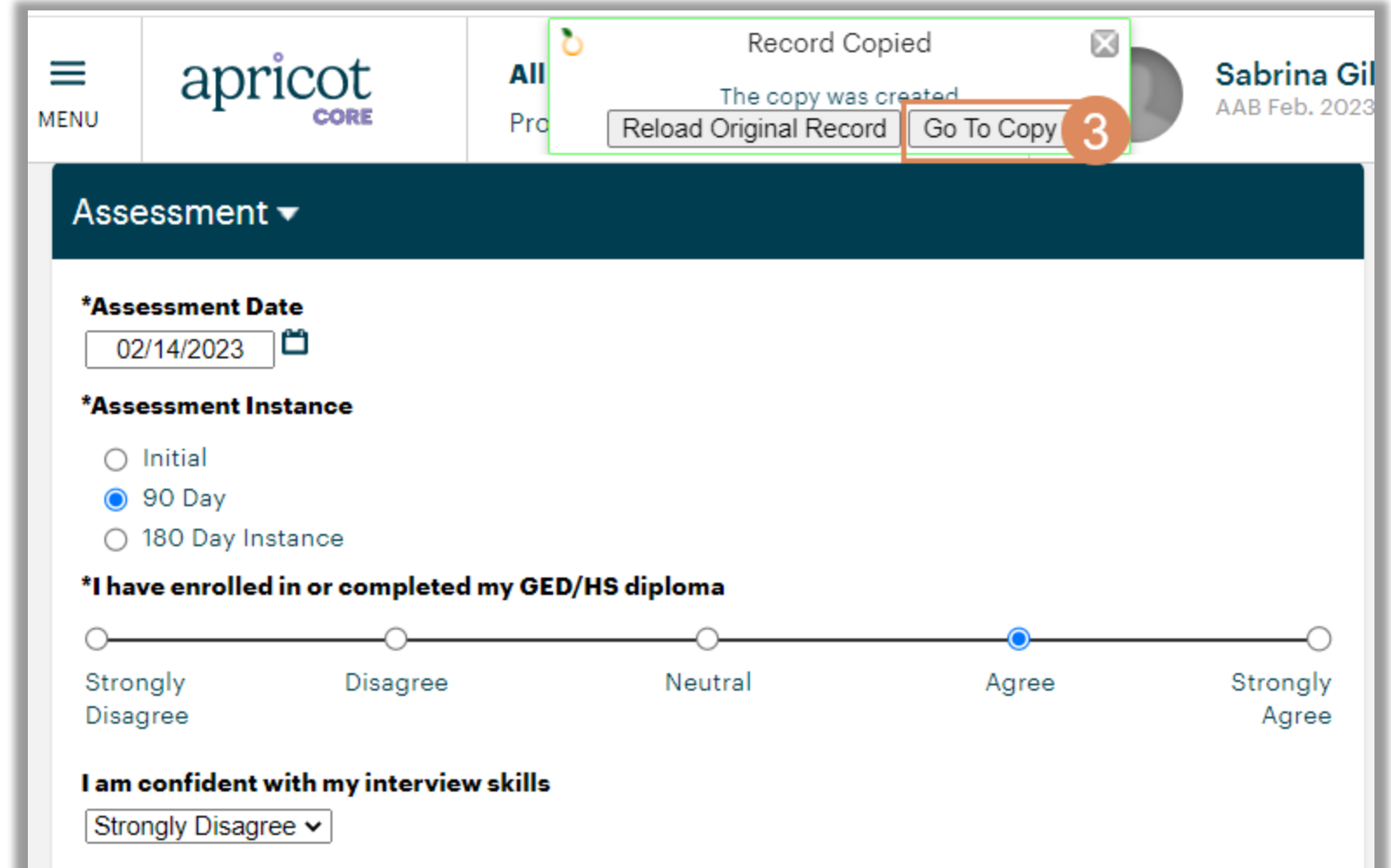
1. Open desired record in edit view
2. Click Copy Record

The screenshot displays the 'Job Readiness Assessment' form for Sharon Matthews. The form includes a header with the name and a 'Quick View Information' link. Below this is an 'Assessment' dropdown menu. The main content area contains several sections: '*Assessment Date' with a date field set to 02/14/2023; '*Assessment Instance' with radio buttons for 'Initial', '90 Day' (selected), and '180 Day Instance'; '*I have enrolled in or completed my GED/HS diploma' with a horizontal scale from 'Strongly Disagree' to 'Strongly Agree', where 'Agree' is selected; and 'I am confident with my interview skills' with a dropdown menu set to 'Strongly Disagree'. On the right side, there is a sidebar with a 'COLLAPSE ALL' button and several sections: 'Record Options' (with 'Copy Record' highlighted and a red circle containing the number 2), 'Attached Enrollments', 'Assigned Programs' (with 'Program Access'), and 'Record Save Checklist'.

Form Properties – Record Copy

Data Entry Steps

1. Open desired record in edit view
2. Click Copy Record
3. Click Go to copy



The screenshot displays the 'apricot CORE' interface. At the top, a notification box titled 'Record Copied' with a close button (X) contains the text 'The copy was created' and two buttons: 'Reload Original Record' and 'Go To Copy'. The 'Go To Copy' button is highlighted with an orange circle containing the number '3'. Below the notification is a dark teal header with the text 'Assessment' and a dropdown arrow. The main form area contains several sections:

- *Assessment Date**: A date input field showing '02/14/2023' with a calendar icon.
- *Assessment Instance**: Three radio button options: 'Initial', '90 Day' (which is selected), and '180 Day Instance'.
- *I have enrolled in or completed my GED/HS diploma**: A horizontal Likert scale with five points: 'Strongly Disagree', 'Disagree', 'Neutral', 'Agree' (selected), and 'Strongly Agree'.
- I am confident with my interview skills**: A dropdown menu currently showing 'Strongly Disagree'.

Form Properties – Record Copy

Data Entry Steps

1. Open desired record in edit view
2. Click Copy Record
3. Click Go to copy
4. Make desired changes
5. Click Save Record

Sharon Matthews
Quick View Information ▶

Assessment ▼

***Assessment Date**
MM/DD/YYYY 📅

***Assessment Instance**

Initial
 90 Day
 180 Day Instance

***I have enrolled in or completed my GED/HS diploma**

Strongly Disagree Disagree Neutral Agree Strongly Agree

I am confident with my interview skills
Strongly Disagree ▼

I am confident with writing my resume

Strongly Disagree
 Disagree
 Neutral

Record Options ▼

Save Record 5
 Print Mode
 Copy Record
 Archive Record
 View History
 New Job Readiness
 View Folder
 Go To Search

Attached Enrollments ▼

Attach to Enrollment

Assigned Programs ▼

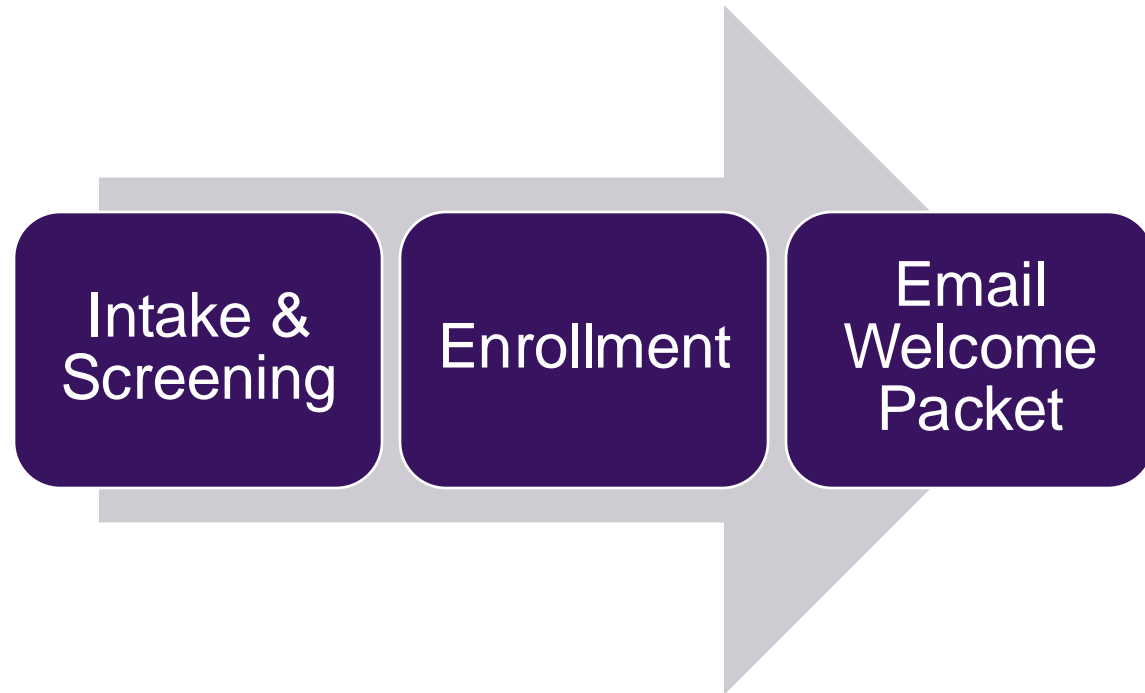
Program Access

Record Save Checklist ▼
Required Field Checks ❌

Email Triggers

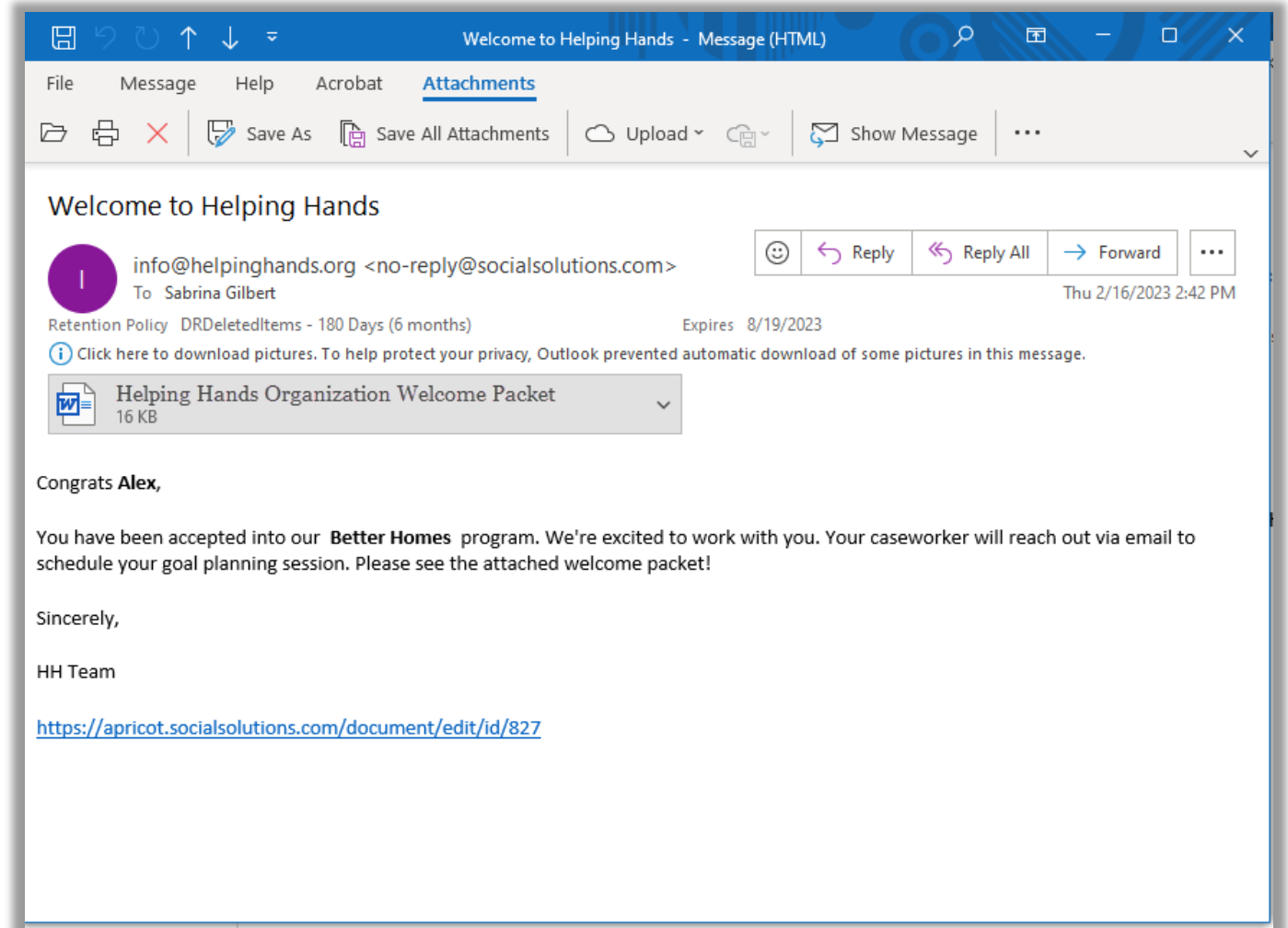
Email Triggers

- Make workflow easier



Email Triggers

- Make workflow easier
- Sends automated email to specified individual(s)
 - Example: Email Welcome packet to new enrollees




Email Triggers


Steps


1. Open desired form in the edit view


Program Enrollment and Exit


Enrollment Information


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. 

Program * 

--Please Select-- 

Enrollment Date * 

MM/DD/YYYY 

Enrollment Notes 

Notes

Email Triggers

Steps

1. Open desired form in the edit view
2. Add Email Trigger Element
3. Publish the Form*

Program Enrollment and Exit

Enrollment Information

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.

Program *
--Please Select--

Enrollment Date *
MM/DD/YYYY

Field Choices

- ▶ All
- ▶ Demographic
- ▶ Option
- ▶ Text
- ▶ Numeric
- ▶ Calculation
- ▶ Date and Time
- ▶ Upload
- ▶ Hyperlink
 - Email
 - Website
- ▶ Linking
- ▶ Special
- ▶ Smart Fields

+ Add Section

Registration

Requirements

All checks passed

Email Triggers

Steps

1. Open desired form in the edit view
2. Add Email Trigger Element
3. Publish the Form*
4. Configure Email Trigger Properties
5. Click Apply to save changes
6. Publish Form

Field Properties (email trigger)

Display Name
Enrollment Notification Email

Standard Properties

Required Duplicate Check Locked
 Quick View Searchable Hidden
 Restricted Clear On Copy

Special Properties

Tooltip

Main | Email Text | Filters | Attachments

Reply To :
info@helpinghands.org

Recipients :
"Client Email" <field_97@webaddress.com>, sgilbert@socialsolutions.com

Users
Add User To Recipients

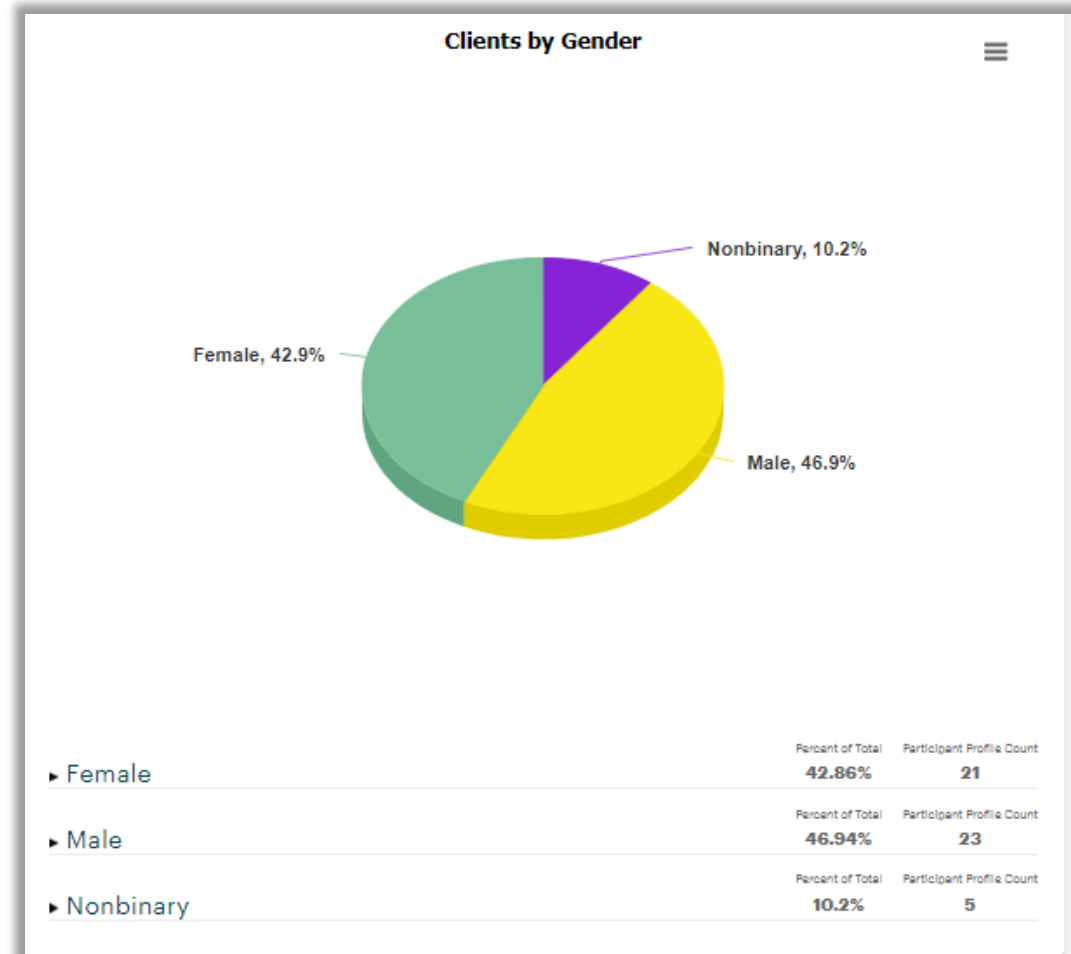
Fields
Add Field To Recipients

Deactivate Apply

Report Ideas for Staff

Report Ideals for Staff

- Make it easier to follow SOPs
- Vary by Organization



Report Ideals for Staff

Example

- Post Assessment Due Report

Post Assessment Due

Missing Pre Test ▼

▼ Forms

- Participant Profile
- Positive Parenting Assessment

► Filters +

▼ Limit Sections

Report last run June 1st 2023, 6:54 pm
[Click to refresh data](#)

Search 🔍 Displaying 3 of 3 Rows (Expand All Cells)

First ▼	Last ▼	Date of Assessment ▼	Evaluation Type ▼	Days Since Pre Assessment ▼
Adam	Voght	02/14/2023	Pre Test	107
Chris	Batten	02/14/2023	Pre Test	107
Vicky	Grayson	03/31/2023	Pre Test	62

Total Rows
3

Report Ideals for Staff

Example

- Pending Inquiries Report

Pending Inquiries ▾ Bulletin with Report Example

Pending Inquiries
Report last run June 1st 2023, 6:38 pm
[Click to refresh data](#)

Search  Displaying 11 of 11 Rows (Expand All Cells)

First	Last	Client Phone Number	Client Email	Client Status
Alvy	Singer	512.454.5454.	alvy.singer@gmail.com	pending
Ashton	Carter	...	ashton@mymail.com	pending
Chris	Batten	...	cb1109@mymail.com	Pending
Elizabeth	Aquino	212.982.2622.	lizrules@mymail.com	Pending
Evan	Anderson	917.181.1525.	evana@mymail.com	Pending
Felicia	Batten	212.928.2726.	battenf@mymail.com	Pending
Heather	Carter	410.918.1716.	heatherc@officemail.com	Pending
Jane	Doe	555.555.5555.	jdoe@fake.com	Pending
Jaquie	Thompson	512.777.4547.	jthompson@gmail.com	Pending
Trey	Singer	512.556.4544.	treysinger@gmail.com	Pending
Vicky	Grayson	512.454.5545.	vgrayson@gmail.com	Pending




Training & Supporting Staff

- Report Building Webinar
- Questions to Ask:
 - What protocols need to be completed in the Software?
 - What reports will make it easier for staff to follow those protocols?
- Ask staff directly



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.