

Tracking Participants' Progress

A New User Webinar

We will begin shortly

Meet Your Trainer

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Learning Objective

This training will cover:

- Data Integrity
- Data Entry in Apricot
 - Tier 1 Forms
 - Tier 2 Forms

At the end of this webinar, you will understand the importance of clean data within Apricot, the structure of data in Apricot and best practices around data entry.

Agenda

Data Integrity & Searching

Data Entry

Tier 1 & Tier 2 Forms

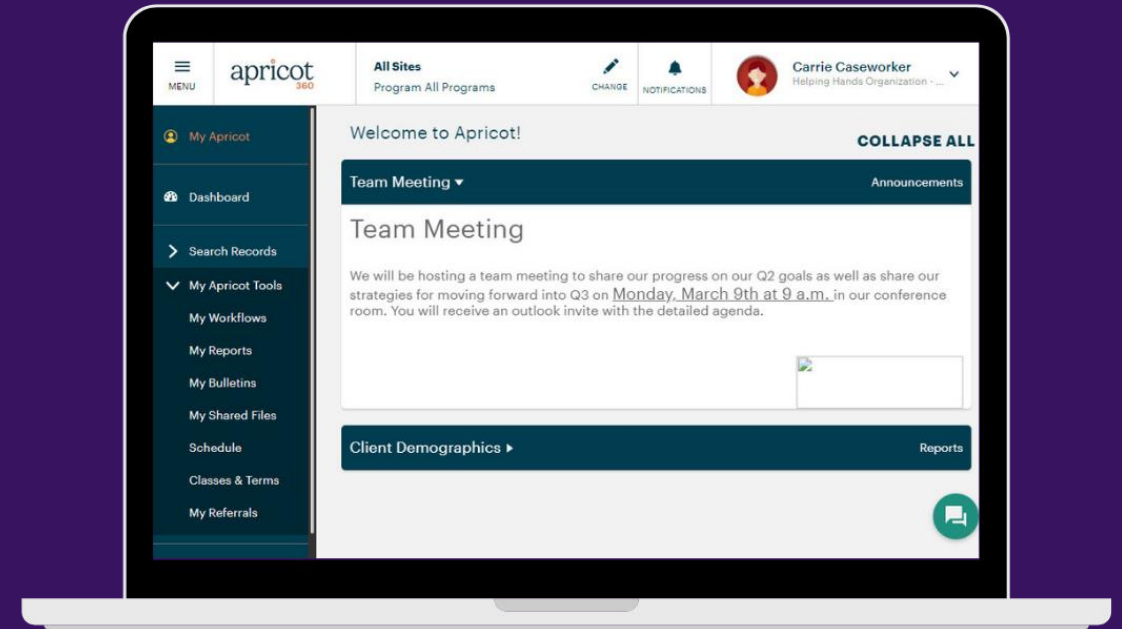
Linking

Data Integrity

Data Integrity

Four Pillars:

- Accuracy
- Uniformity
- Completeness
- Timely



As an end user...

Here is how you can ensure you're contributing valuable data:

- Follow the format laid out for each field
- Enter data as soon as possible following your interactions to optimize accuracy and completeness
- Use the search records to avoid duplication


The reports that your organization can pull are only as good as the data that you have entered!

Individualized Service

Adam Leveque
Quick View Information ▶

Service Information ▼

This form should be completed when a client receives any individualized service.

***Service Date**
 

***Service Type**
 ▼

***Funding Source**
 ▼

***Service Time in Hours**

Data Entry

Forms and Records

What is a form?

- Electronic templates in Apricot much like paper forms
- Designed by Administrator intended to collect data

What is a record?

- A saved copy of unique data within a form
- Viewed with other records in a report

Apricot Data Entry

Steps to enter data

1. Perform a Search
2. Complete Tier 1 form
3. Assign Program Access
4. Complete 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

Participant

Participant Details

***Legal Name**

***Date of Birth**

Email

Mailing Address [Clear](#)

Legal Name differs from Preferred Name?
 Yes
 No

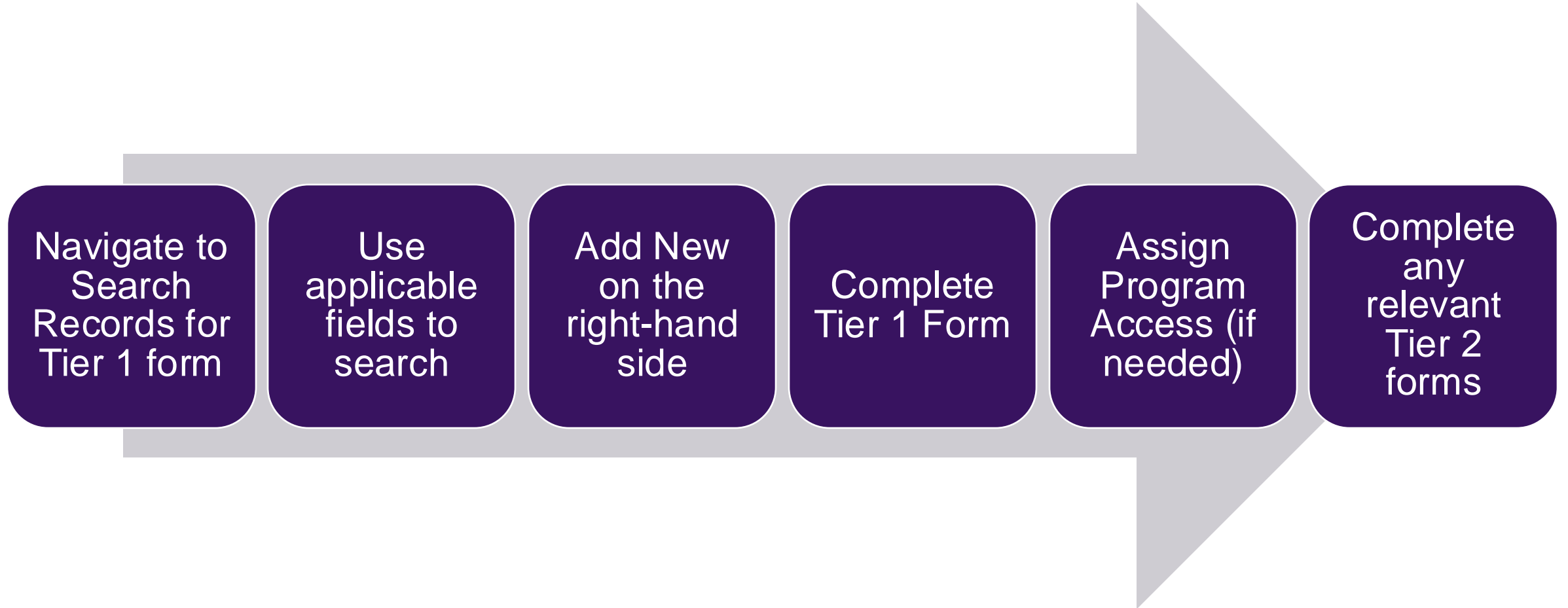
Nickname or Alias?
 Yes
 No

***Pronouns**

Mobile Phone ext.

Monthly Income

Process



Tier 1 Forms & Records

Tier 1 Forms and Records

- Do not allow duplicate records by forcing users to search existing data first.
- Contain only information which is not expected to change as the result of services (like date of birth and phone number).
- Should be kept up to date.

Client Profile

Client Profile Search

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

Showing 1 - 20 of 74 available Client Profile records

Client Name ▼	Intake Date ▼	Date of Birth ▼	Client Status ▼	Client Email ▼
Adam Bradley	05/14/2019	05/06/1979	Active	abradley@ymail.com
Alan Davis	07/05/2019	06/07/1989	Active	aland@mymail.com

Creating Tier 1 Records

Step 1: Search for existing record.

Step 2: Click New ...on the right.

Step 3: Fill in the form.

Step 4: Save the Record.

Dashboard

Search Records

1 Client Profile

Household Profile

Group Workshops

Caseworker Profile

Client Profile

Client Profile Search

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

Showing 1 - 20 of 74 available Client Profile records [More Columns...](#)

Client Name ▾	Intake Date ▾	Date of Birth ▾	Client Status ▾	Client Email ▾	Gender ▾
Adam Bradley	05/14/2019	05/06/1979	Active	abradley@ymail.com	Male
Alan Davis	07/05/2019	06/07/1989	Active	aland@mymail.com	Male

EXPAND ALL

Search Actions ▾

- 2 + New Client Profile
- ✕ Clear Search History
- 🔒 Program Access
- 📁 Merge Folders
- ↔ Create Referral

Tier 1 Forms & Records

Duplicate Check

- Exact Match.
- Searches ALL records.

Required Fields:

- Have asterisks mark.
- Enter all data as a best practice.

The screenshot shows a web application interface for managing client profiles. On the left is a dark sidebar with navigation options: Dashboard, Search Records, Client Profile (highlighted with a red circle and the number 1), Household Profile, Group Workshops, and Caseworker Profile. The main content area is titled 'Client Profile' and features a search bar with a dropdown menu set to '-- Add Search Field --' and a 'Browse All' link. Below the search bar, it indicates 'Showing 1 - 20 of 74 available Client Profile records' and includes a 'More Columns...' link. A table displays the first two records:

Client Name	Intake Date	Date of Birth	Client Status	Client Email	Gender
Adam Bradley	05/14/2019	05/06/1979	Active	abradley@ymail.com	Male
Alan Davis	07/05/2019	06/07/1989	Active	aland@mymail.com	Male

On the right side of the interface, there is an 'EXPAND ALL' button and a 'Search Actions' dropdown menu. The 'Search Actions' menu is open, showing options: '+ New Client Profile' (highlighted with a red circle and the number 2), 'X Clear Search History', 'Program Access', 'Merge Folders', and 'Create Referral'.

Tier 1 Forms & Records

Assign Program Security

- Determines which program can see data in search results.
- Can be set to auto – assign.
- Select as many as needed.

*This is something your Administrators will have set up so you may or may not see this step in your own forms!

Participant Profile

Profile Details

*Participant Name: Devin

*Date of Birth: 06/05/2000

Client Status: Active Inactive Other

Client Phone Number: [] [] []

Demographic Information

Assign Programs

Selection made here determines which program can see the data in search results

Available Programs: Advocacy, Better Homes, College Prep, Counseling, Empowering Families, Empowering Families NY, Workforce Development

Assigned Programs

Add All >> Remove All <<

Add > Remove <

You must save the record for the access changes to have effect

Apply Cancel

COLLAPSE ALL

Record Options: Save Record, New Participant Profile, Go To Search

Assigned Programs: Program Access

Record Save Checklist: Required Field Checks ✓, Field Validation Checks ✓

Document Folder

Document Folder

Automatically created when saving a new Tier 1 record.

This folder provides:

Quick access to edit Tier 1 details.

Quick navigation to record Tier 2 forms

The screenshot displays a user interface for a user named Adam Bradford. At the top, there are navigation buttons: 'Edit' (with a pencil icon), 'Create' (with a plus icon), and 'Print' (with a printer icon). Below these is a 'Quick View Information' section. The main content area is divided into tabs: 'DOCUMENT FOLDER' (selected), 'CENSUS', 'LINKS', and 'APPOINTMENTS'. Under the 'DOCUMENT FOLDER' tab, there is a list of documents. The first item is 'All Documents', which is highlighted with an orange arrow and a '2' in a circle. To its right are options for 'Expand Multiline' and a 'Search Forms' input field. Below 'All Documents' are three other document types, each with a plus icon, a name, and a record count: 'Program Enrollment and Exit (1 record)', 'Positive Parenting Assessment (0 records)', and 'Individualized Services (1 record)'. Each of these items also has a plus icon and a pin icon on the right side.

Accessing the Document Folder

Step 1: Click the form name under the record search

Step 2: Search for the desired record

Step 3: Click the desired record from the search results

Client Profile

Client Profile Search

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

Showing 1 - 20 of 74 available Client Profile records

Client Name ▼	Intake Date ▼	Date of Birth ▼	Client Status ▼	Client Email ▼
Adam Bradley	05/14/2019	05/06/1979	Active	abradley@ymail.com
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Tier 2 Records

Tier 2 Forms and Records

- Track information over time for a participant, group or volunteer.
- Can be completed more than once.
- Can only be accessed from the Document Folder.

Individualized Services (5 records)

SERVICE DATE	SERVICE TYPE	FUNDING SOURCE	SERVICE TIME IN HOURS	SERVICE NOTES
06/10/2015	Job Search Supports	CTK	1.5	Discussed required courses and mapped out program activities.
07/15/2015	Counseling - Group Session	CTK	2	Great participation in group session.
07/25/2015	Job Search Supports	CTK	1.25	Touchbase for next steps.
09/27/2015	Counseling - Individual Session	CTK	1	Interview Preparation
09/22/2015	Legal Assistance	ABC	3	Course completion ceremony.

Create Tier 2 Records

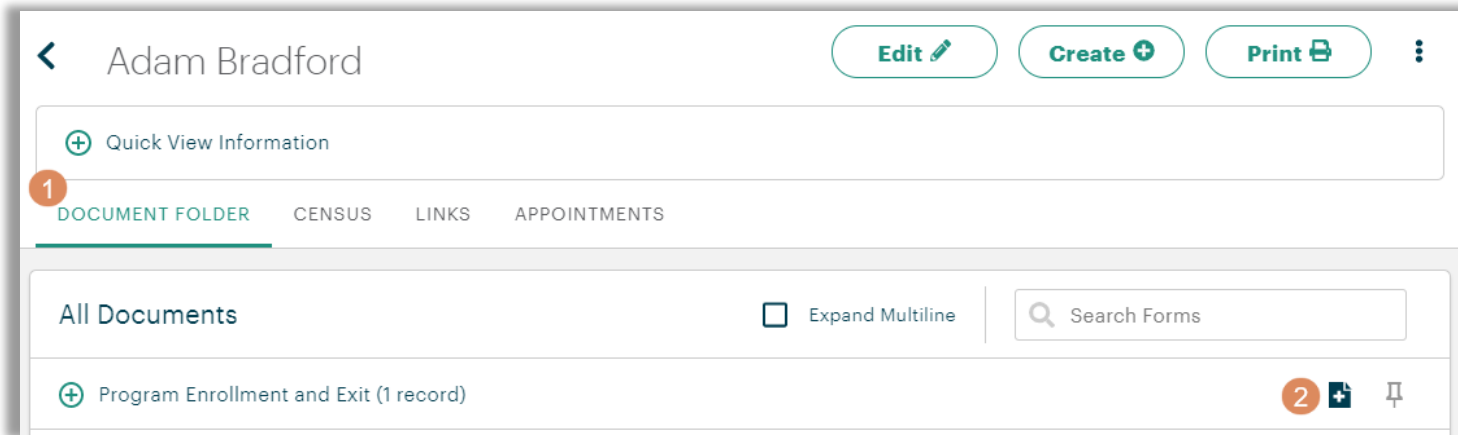
Step 1: Access the Document Folder

Step 2: Find the Tier 2 Form under All Documents

Step 3: Click the Create New icon on the right

Step 4: Complete the form

Step 5: Save!



Edit Tier 2 Records

Step 1: From the Document Folder scroll to the tier 2 form.

Step 2: Click the toggle to view all Tier 2 records of that form.

Step 3: Click the record to open it in the edit view

Step 4: Edit the data and Save.

Adam Bradford Edit

+ Quick View Information

1 DOCUMENT FOLDER CENSUS LINKS APPOINTMENTS

All Documents Expand Multiline

2 - Program Enrollment and Exit (1 record)

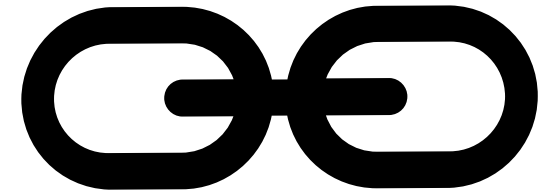
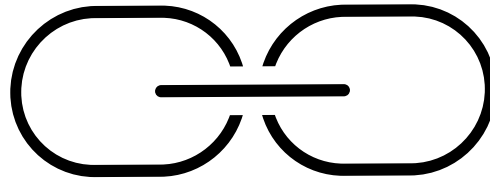
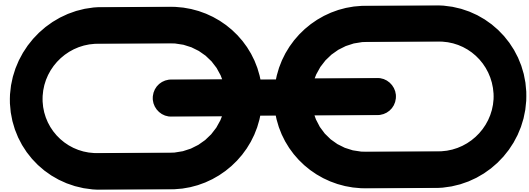
PROGRAM	ENROLLMENT DATE
3 Empowering Families	07/08/2019

Linking Records

Linking Records

Links can be used to:

- Create relationships between records recognized by report builder.
 - Ex: creating a connection between individuals and the household they belong to
- Enhance workflow for users.
- Auto Populate data from one record to another.



Linking Records

A perfect example of linking is Participants to Households.

- Clients cannot be linked to other clients
- Use a Tier 1 form to track Households, then link clients to those households
- Data the family has in common (like address) can be auto populated to the family form.

Identifying Information for Household ▾

***Name of Head of Household** ⓘ

Samuel R Cobley

Household Type

Adults Only ▾

Contact Information ▶

Additional Family Members ▾

Click the "Add" button to link this Household record to the Client Profile of each member of the household

Hide Deactivated Links [+ Add](#)

Participant Profile					Link Info			
Name ▾	Date of Birth ▾	Gender Identity ▾	Race ▾	Primary Language ▾	Relationship to Head of Household	Active ▾	Delete	Date ▾
Jasmine Smith	03/28/1989	Female	Multi-Racial	Spanish	Child ▾	<input checked="" type="checkbox"/>		Added on 08/15/2017
James Monsteve	10/01/1989	Male	Asian	English	-- Please Select -- ▾	<input checked="" type="checkbox"/>		Added on 08/15/2017

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)

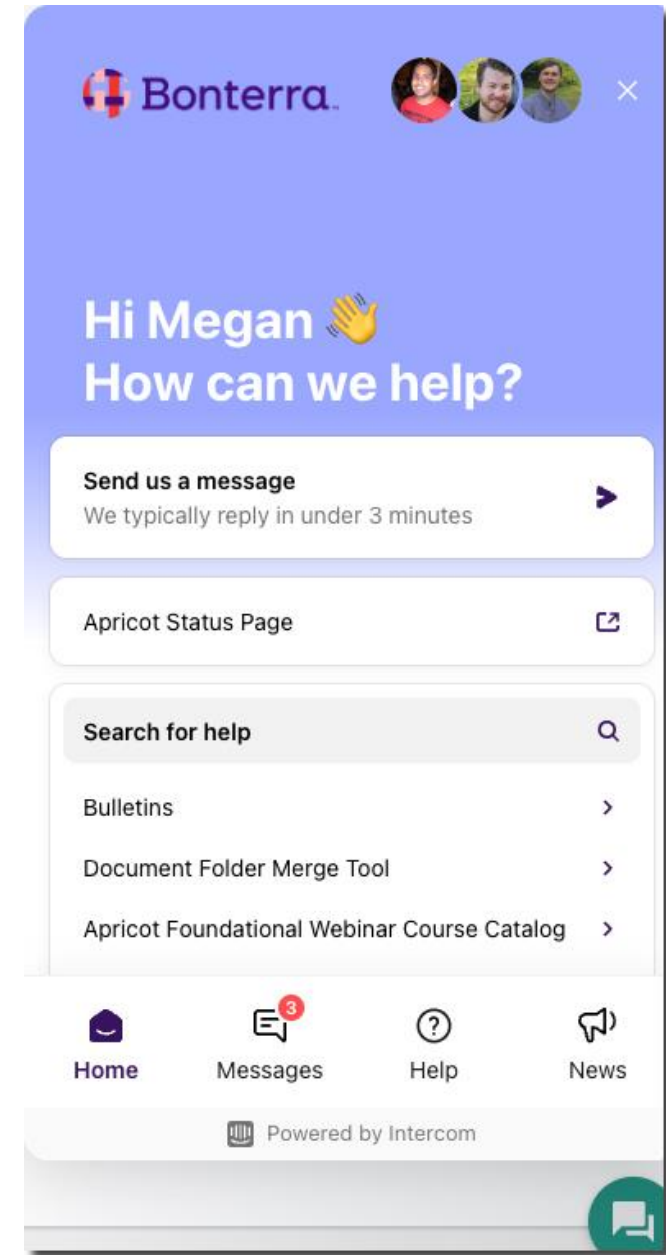


Build confidence & knowledge in
our software!

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.