Tracking Participants' Progress

A New User Webinar

We will begin shortly

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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

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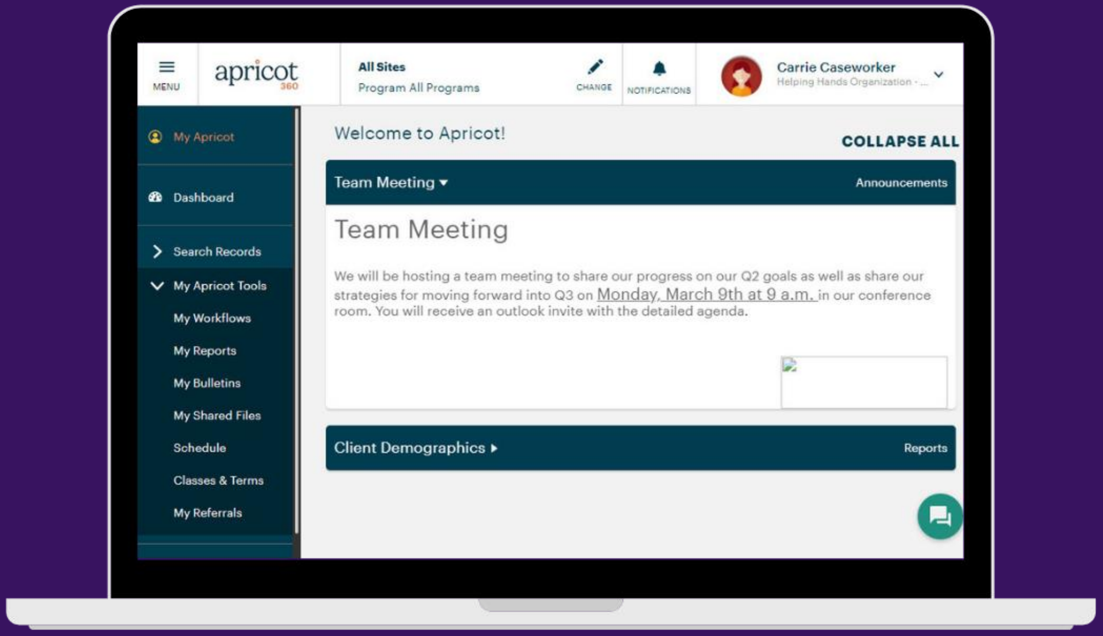
Data Integrity

Four Pillars:

- Accuracy
- Uniformity
- Completeness
- Timely



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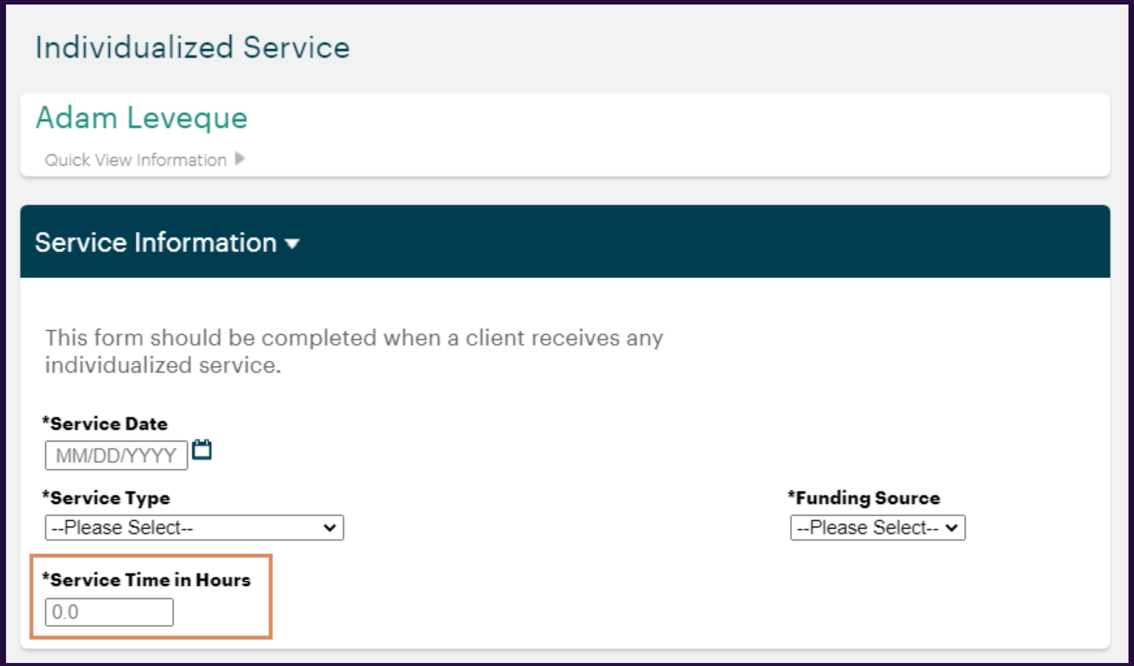
As an end user...

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!



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Data Entry

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Forms and Records

What is a form?

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

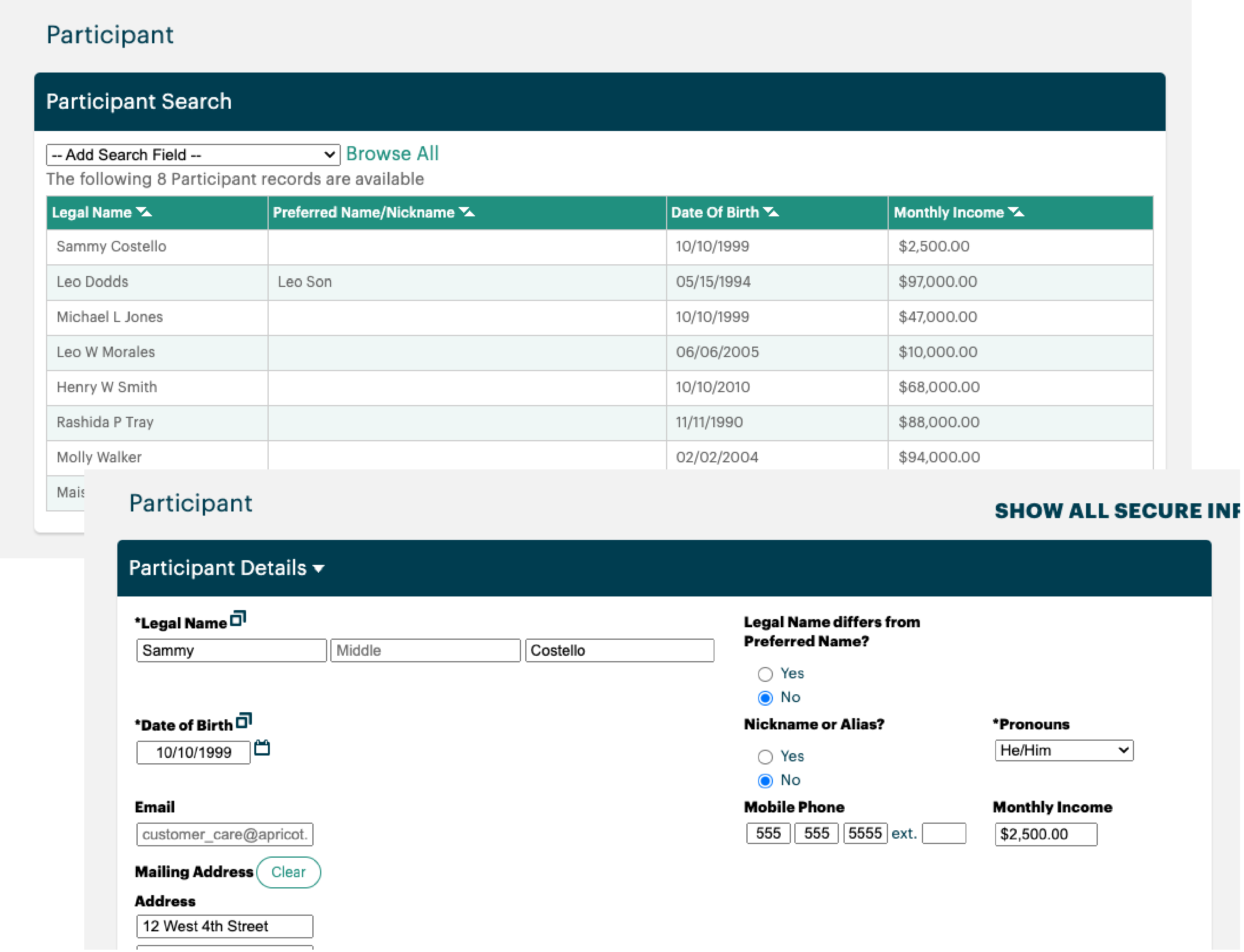
What is a record?

- 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



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Process

1. Navigate to Search Records for Tier 1 form
2. Use applicable fields to search
3. Add New on the right-hand side
4. Complete Tier 1 Form
5. Assign Program Access (if needed)
6. Complete any relevant Tier 2 forms

Tier 1 Forms & Records

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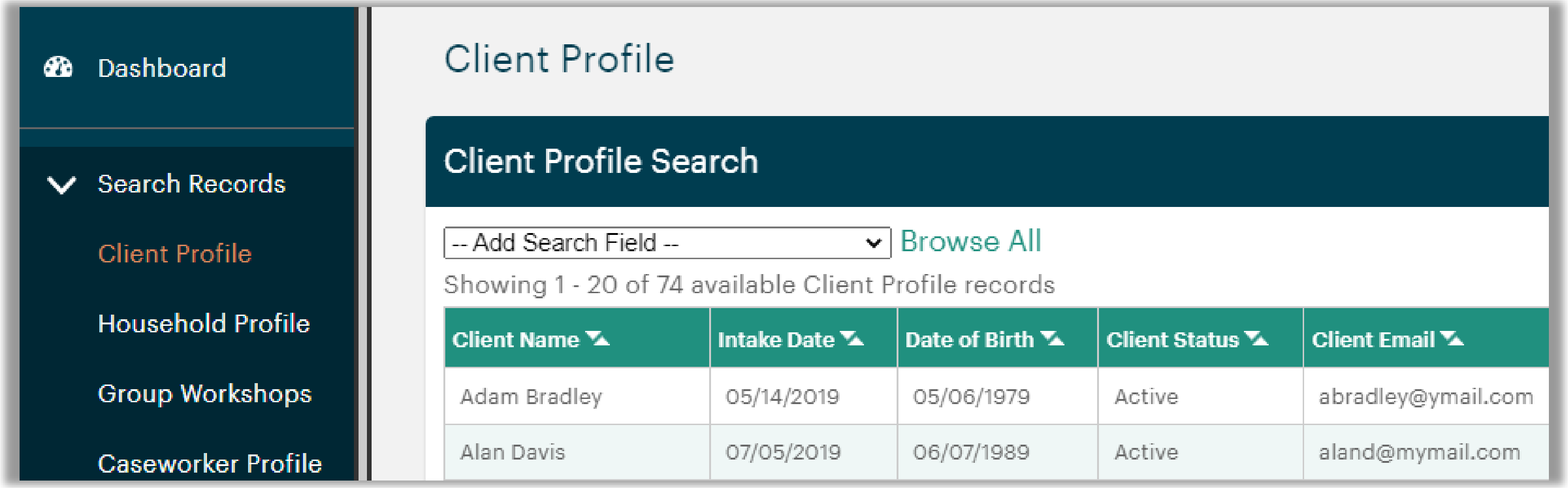
Tier 1 Forms and Records

- 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.



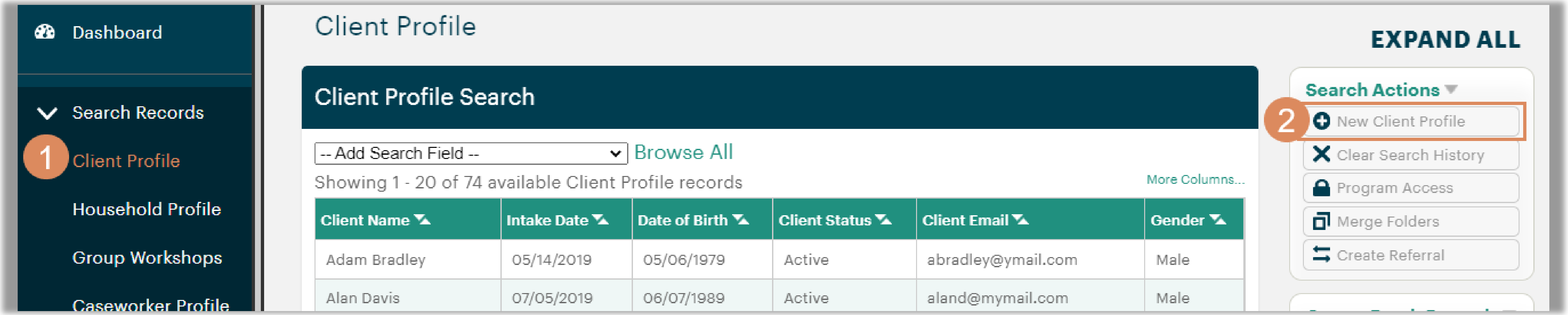
Creating Tier 1 Records

Step 1: Search for existing record.

Step 2: Click New …on the right.

Step 3: Fill in the form.

Step 4: Save the Record.



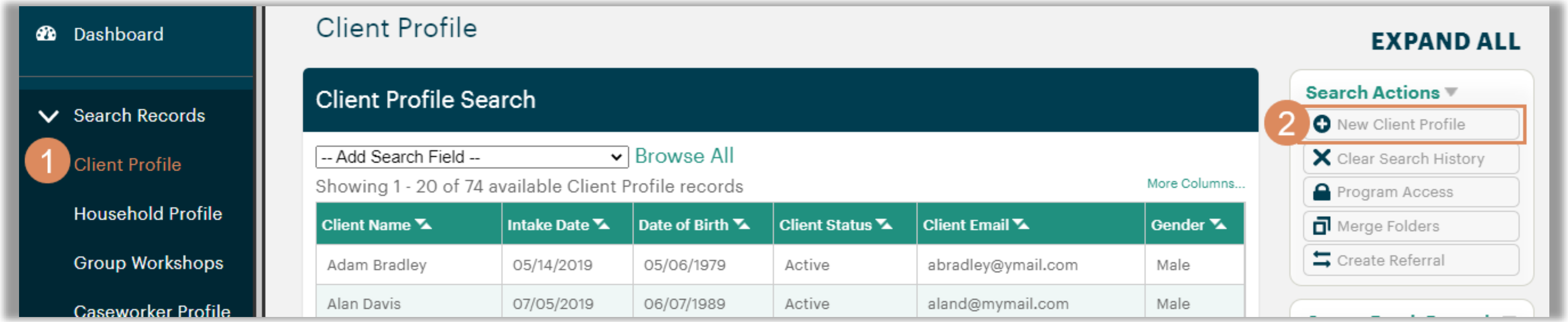
Tier 1 Forms & Records

Duplicate Check

- Exact Match.
- Searches ALL records.

Required Fields:

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

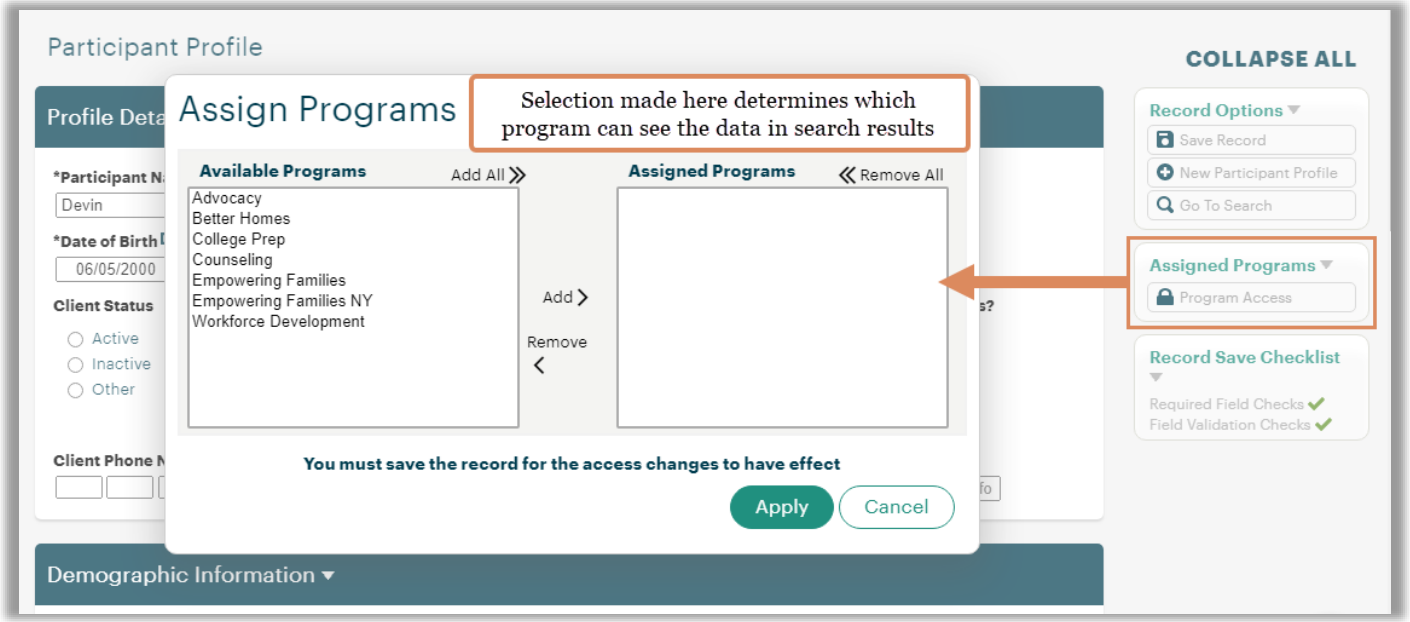


Tier 1 Forms & Records

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!



Document Folder

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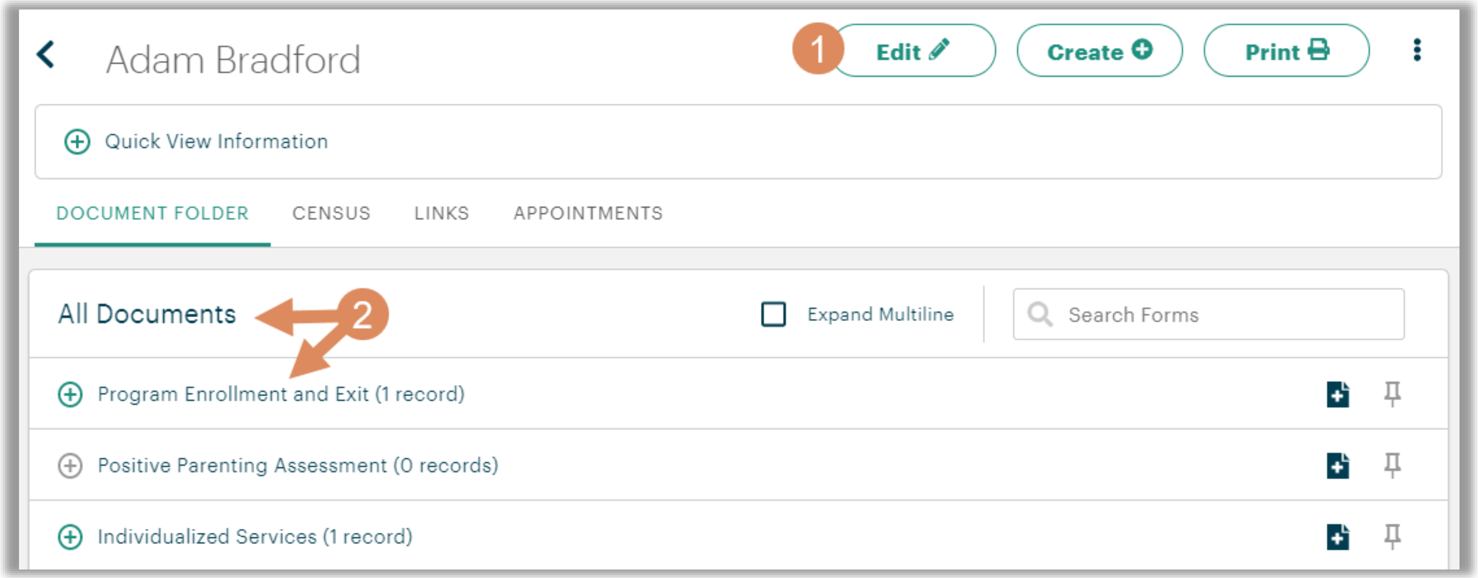
Document Folder

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



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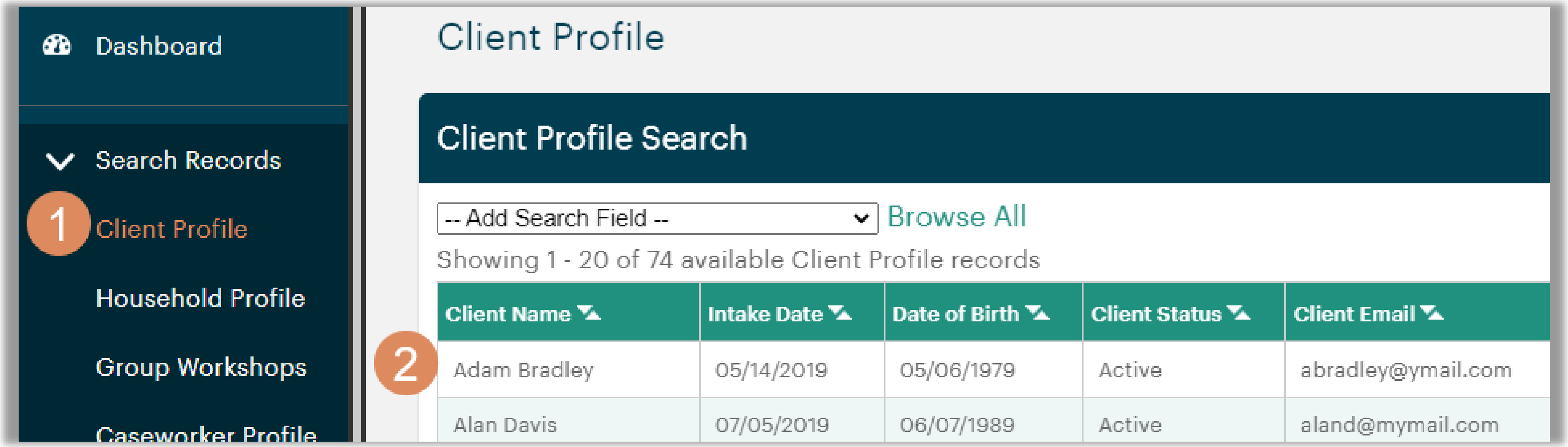
Accessing the Document Folder

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



Tier 2 Records

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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

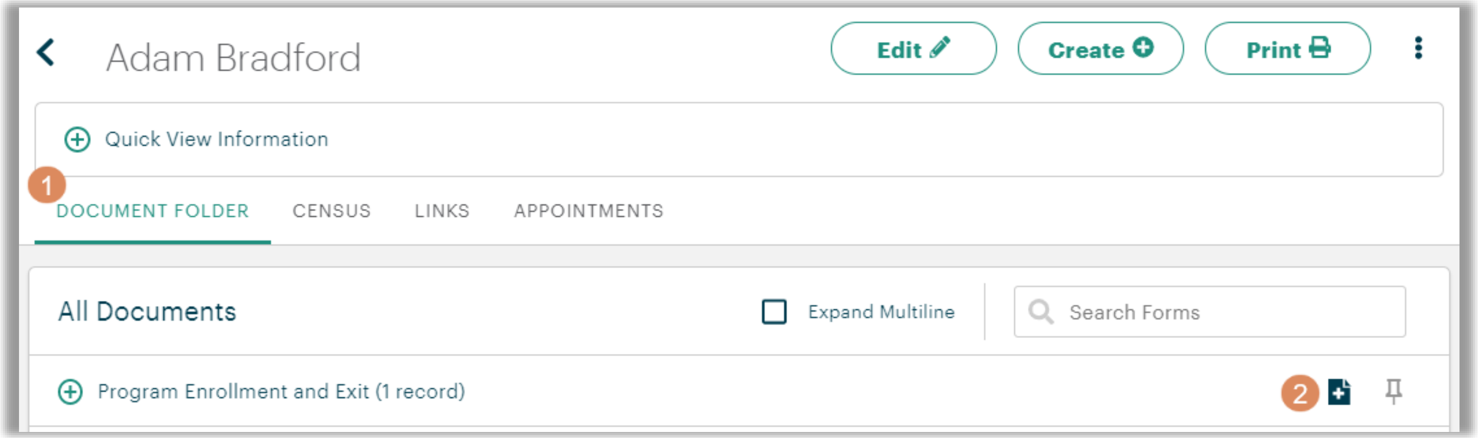
Step 1: Access the Document Folder

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!



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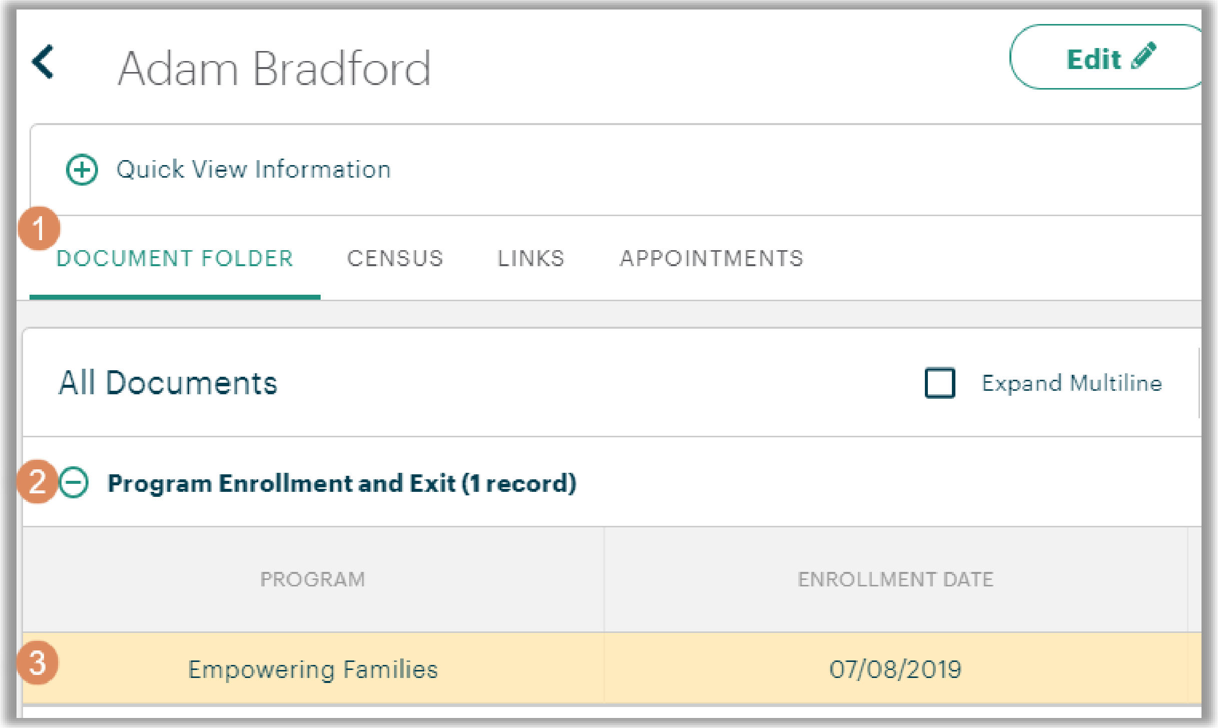
Edit Tier 2 Records

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.



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Linking Records

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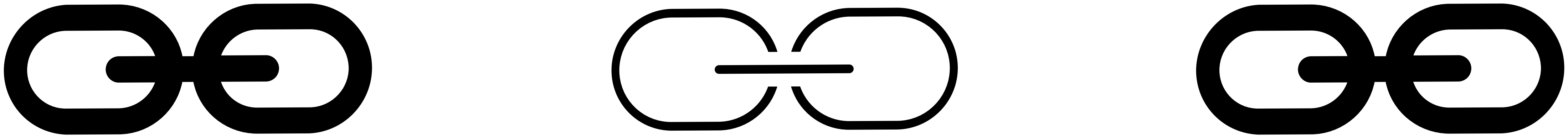
Linking Records

Links can be used to:

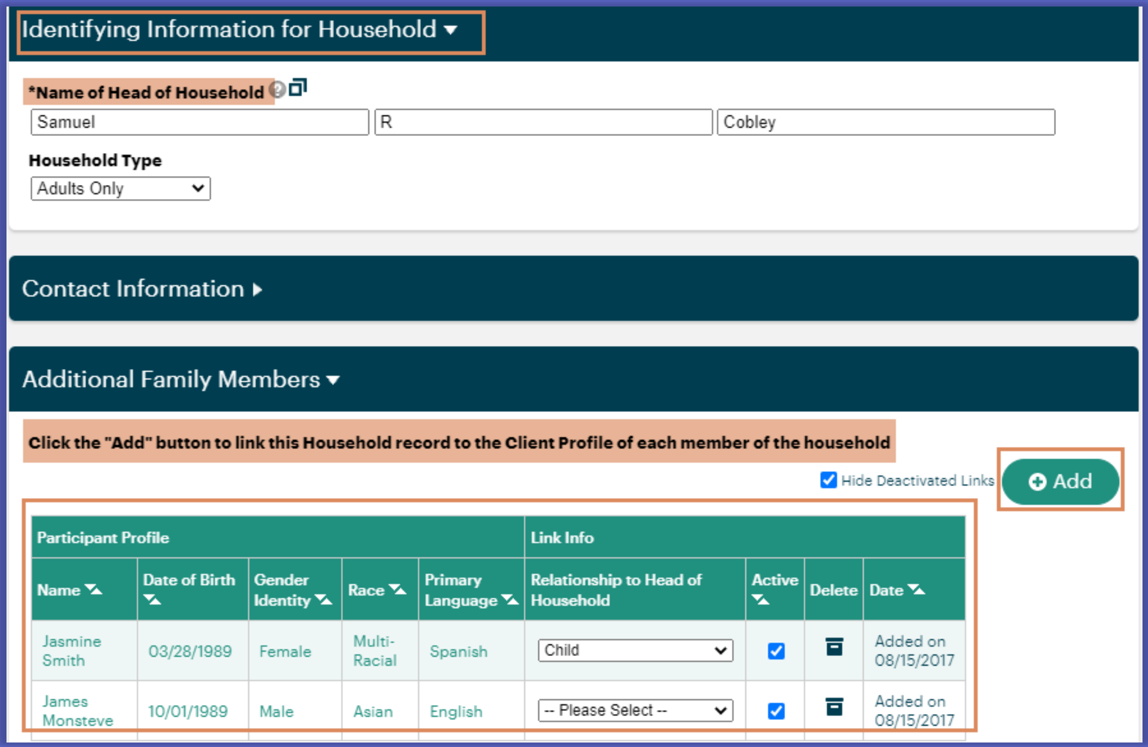
- Create relationships between records recognized by report builder.
  - Ex: creating a connection between individuals and the household they belong to
- Enhance workflow for users.
- Auto Populate data from one record to another.



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.



Additional Resources

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Additional Training Opportunities

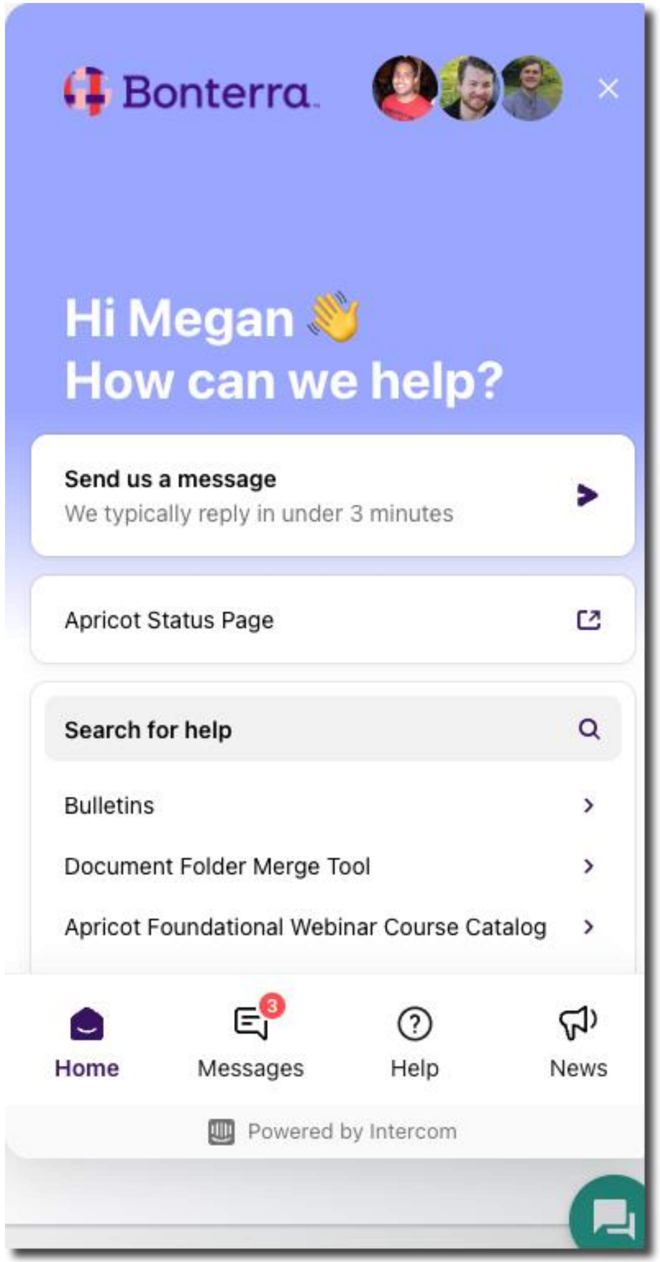
- Knowledge Base – How-To Articles (Search Chat or Visit Online)
- Bonterra Academy – Free Webinars & Recordings
- Foundations – Intensive, Multiday Courses to Cover Admin Basics
- Admin Labs – 2 Hour Live Trainings on Specific Capabilities
- Private Training – 1:1 Sessions with Training Expert in Your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

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