

# Apricot Data Entry Instructions

# Crisis Navigation

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# Deliverables



# Deliverables

- Number of crisis visits.
- Percentage of crisis visits resulting in a safety plan.
- Percentage of crisis visits resulting in a service referral.
- Percentage of participants in short-term case management services who receive at least 1 in-person contact per week.
- Percentage of participants in short-term case management services who receive at least 3 total contacts per week.



# Crisis Navigation Form



# Crisis Navigation Form

**Step 1:** Complete a new crisis navigation form for each individual visited by selecting "Crisis Navigation" on the left side of the screen.

The screenshot displays the Apricot 360 web application interface. The top navigation bar includes the 'apricot 360' logo, 'MY APRICOT ADMINISTRATOR', and 'All Sites Program All Programs'. A dark teal sidebar on the left contains a menu with items: Dashboard, Inventory, Search Records, Site Profile, Participant, Crisis Navigation (highlighted with a red box), DVP Consent Form, Emergency Relocation Referral Form, and Group Activity/Event/Drop-in Center. The main content area is titled 'Crisis Navigation' and features a 'Main' dropdown menu. Below this, the form includes several required fields: \*Date (MM/DD/YYYY), \*Location (dropdown), \*Arrival Time (5:30 AM), \*End Time (5:30 AM), \*Race of Person Visited (dropdown), and \*Gender of Person Visited (dropdown). There are also optional fields for Individual name (First, Middle, Last) and Date of birth (MM/DD/YYYY). A radio button question asks '\*Was a safety plan created?' with 'Yes' and 'No' options. A 'Notes' text area is located at the bottom of the form.



# Crisis Navigation Form

**Step 2:** If the individual consents to short-term case management services, create a participant record for them using the instructions in this guide. Then, return to the **Crisis Navigation Form** to link the participant record.

**Was a safety plan created?**

Yes  
 No

**Notes**

Notes

**Did the individual consent to short-term case management?**

Yes  
 No

If this individual consents to short-term case management, a participant link must be created for them.

If the individual is not yet in the system, they must first be added as a participant before this record can be saved.

Add the link below.

**Participant Link**

Hide Deactivated Links




# Crisis Navigation Form

**Step 3:** If a service referral is made, enter details of the referral.

**\*Did you make a referral?**

Yes  
 No

**\*Date of referral**



*This field is required.*

**\*Was the referral within or outside of the DVP network?**

Within DVP network  
 Outside DVP network

**\*Organization referred to (within DVP network)**

*This field is required.*



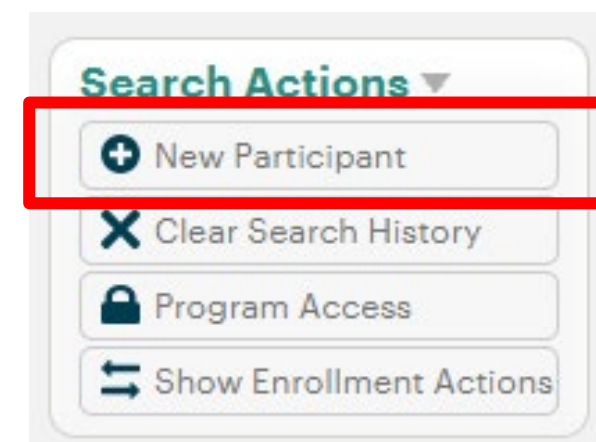
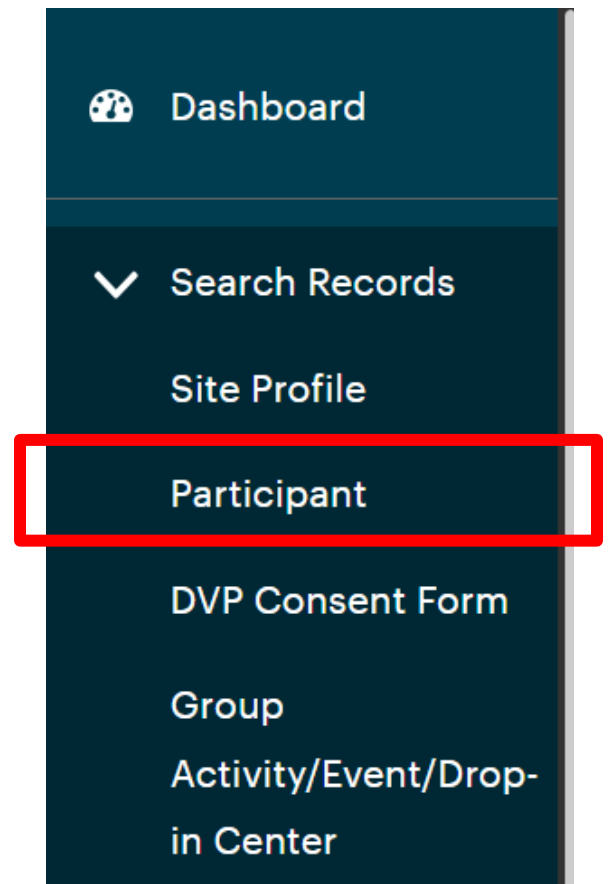
# Participant Records



# Creating a Participant Record

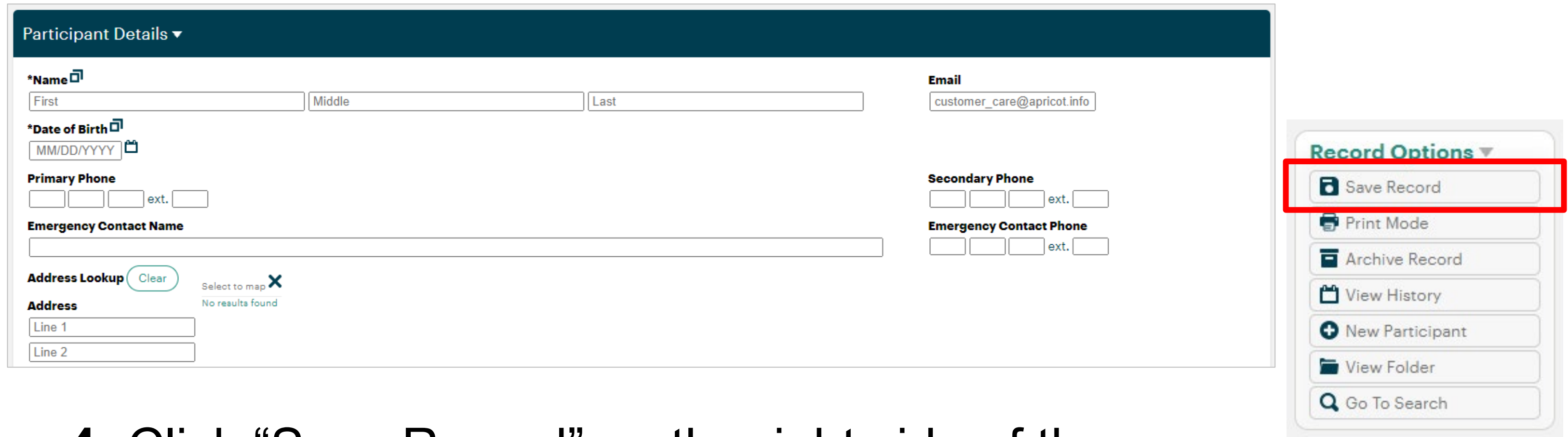
**Step 1:** Select “Participant” on the left side of the screen under “Search Records.”

**Step 2:** Select “+ New Participant” on the right side of the screen.



# Creating a Participant Record

**Step 3:** Complete all fields under “Participant Details” and “Demographic Information.”



The screenshot shows a web form titled "Participant Details" with a dark teal header. The form is divided into several sections:

- \*Name:** Three input fields for "First", "Middle", and "Last".
- Email:** One input field containing "customer\_care@apricot.info".
- \*Date of Birth:** One input field with a calendar icon and the format "MM/DD/YYYY".
- Primary Phone:** Three input fields for area code, number, and extension, followed by "ext." and another input field.
- Secondary Phone:** Three input fields for area code, number, and extension, followed by "ext." and another input field.
- Emergency Contact Name:** One input field.
- Emergency Contact Phone:** Three input fields for area code, number, and extension, followed by "ext." and another input field.
- Address Lookup:** A "Clear" button and a "Select to map" button with a red 'X' icon. Below it, the text "No results found" is displayed.
- Address:** Two input fields labeled "Line 1" and "Line 2".

On the right side of the screen, there is a "Record Options" menu with a dropdown arrow. The "Save Record" button is highlighted with a red rectangular box. Other options in the menu include "Print Mode", "Archive Record", "View History", "New Participant", "View Folder", and "Go To Search".

**Step 4:** Click “Save Record” on the right side of the screen.



# Duplicate Records

If a person is already in Apricot because they received services from a different agency, a duplicate record message will appear.

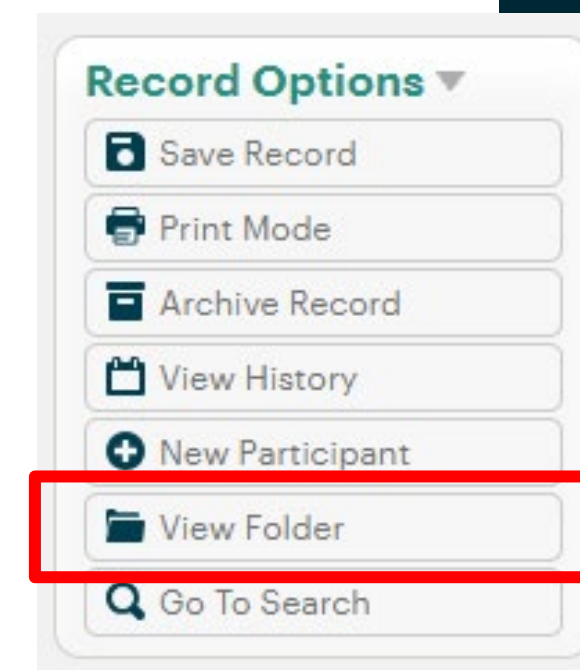
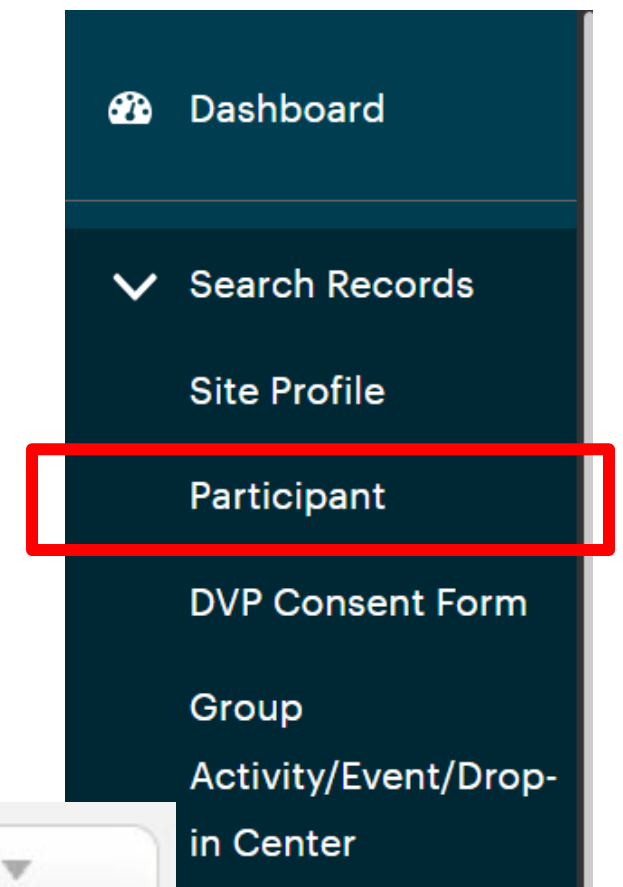
Complete [this form](#) to have the person added to your site.



# Accessing a Participant's Folder

**Step 1:** Select “Participant” on the left side of the screen under “Search Records.”

**Step 2:** Find the participant and click on their name. Then, select “View Folder” on the right side of the screen.





# Accessing a Participant's Folder

This is the participant's folder, where all service delivery records are stored. To add a new record in any folder, click the "+" icon in the correct row.

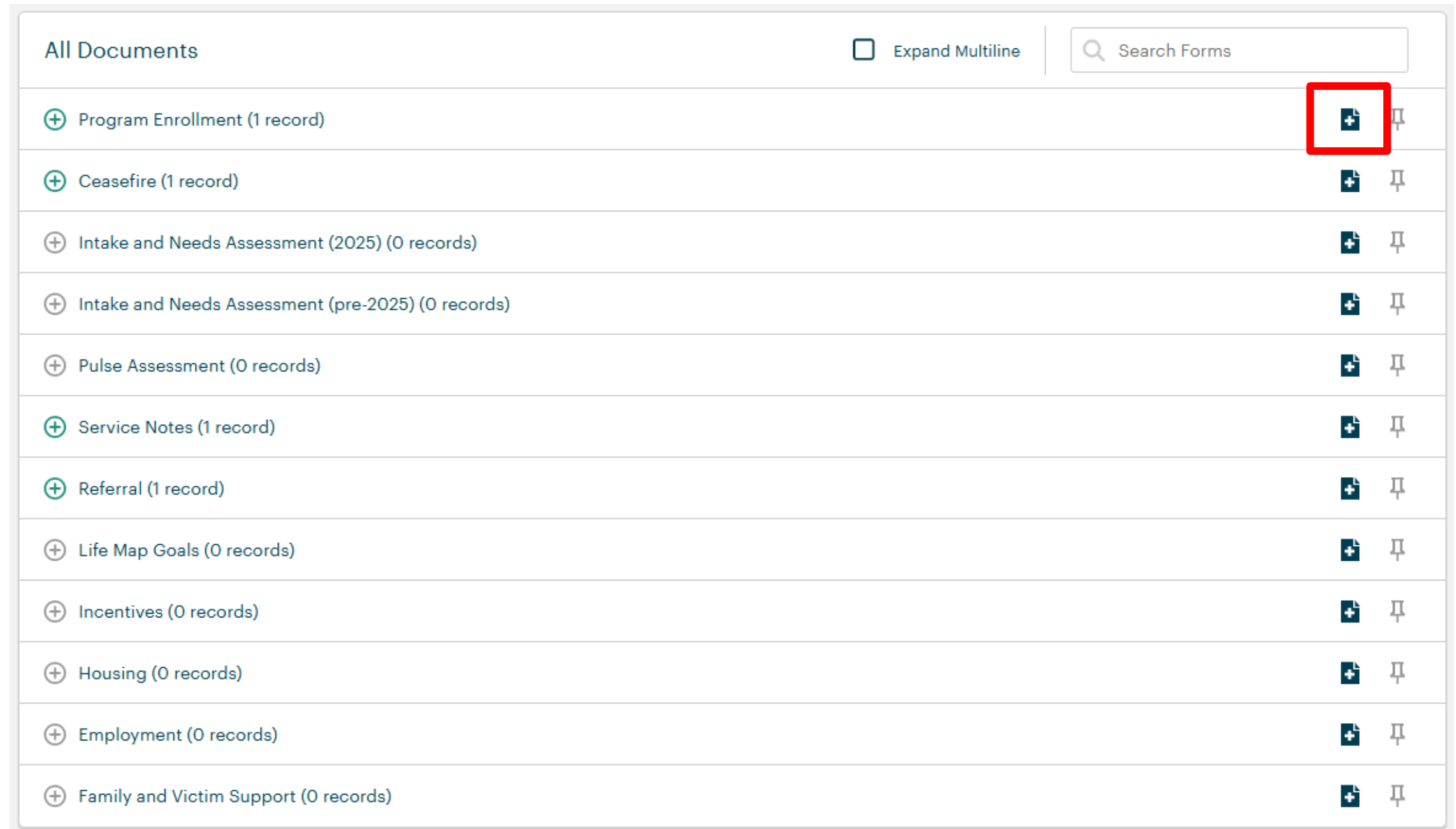
All Documents		<input type="checkbox"/> Expand Multiline	<input type="text" value="Search Forms"/>
+ Program Enrollment (1 record)			
+ Ceasefire (1 record)			
+ Intake and Needs Assessment (2025) (0 records)			
+ Intake and Needs Assessment (pre-2025) (0 records)			
+ Pulse Assessment (0 records)			
+ Service Notes (1 record)			
+ Referral (1 record)			
+ Life Map Goals (0 records)			
+ Incentives (0 records)			
+ Housing (0 records)			
+ Employment (0 records)			
+ Family and Victim Support (0 records)			



























# Program Enrollment Form

# Enrolling a Participant

**Step 1:** Click the “+” button next to “Program Enrollment” in the participant folder.



All Documents	<input type="checkbox"/> Expand Multiline	<input type="text" value="Search Forms"/>
+ Program Enrollment (1 record)		
+ Ceasefire (1 record)		
+ Intake and Needs Assessment (2025) (0 records)		
+ Intake and Needs Assessment (pre-2025) (0 records)		
+ Pulse Assessment (0 records)		
+ Service Notes (1 record)		
+ Referral (1 record)		
+ Life Map Goals (0 records)		
+ Incentives (0 records)		
+ Housing (0 records)		
+ Employment (0 records)		
+ Family and Victim Support (0 records)		




# Enrolling a Participant

**Step 2:** Complete the “Enrollment” section of the form. Then click “Save Record” on the right side of the screen.

**Enrollment** ▼

**\*Program Enrolling**  
EBAYC - Crisis Navigation ▼

**\*Site**  
East Bay Asian Youth Center (EBAYC) ▼

**\*Start Date**  
10/01/2025 

**\*Referral Source**  
Hospital ▼

**Enrollment Notes**  
Notes



# Exiting a Participant

Return to the **Program Enrollment Form** when the individual exits the program to enter the exit date and reason.

Exit ▾

<b>Exit Date</b> <input type="text" value="07/09/2024"/>	← Enter date of last contact.	<b>Length of Enrollment in Days</b> <input type="text" value="0"/>	← This field will auto calculate.
<b>*Primary Reason for Exit</b> <input type="text" value="--Please Select--"/>	← Select the appropriate exit reason.	<b>Exit Notes</b> <input type="text" value="Notes"/>	

This field is required.



# Consent Form



# Types of consent forms

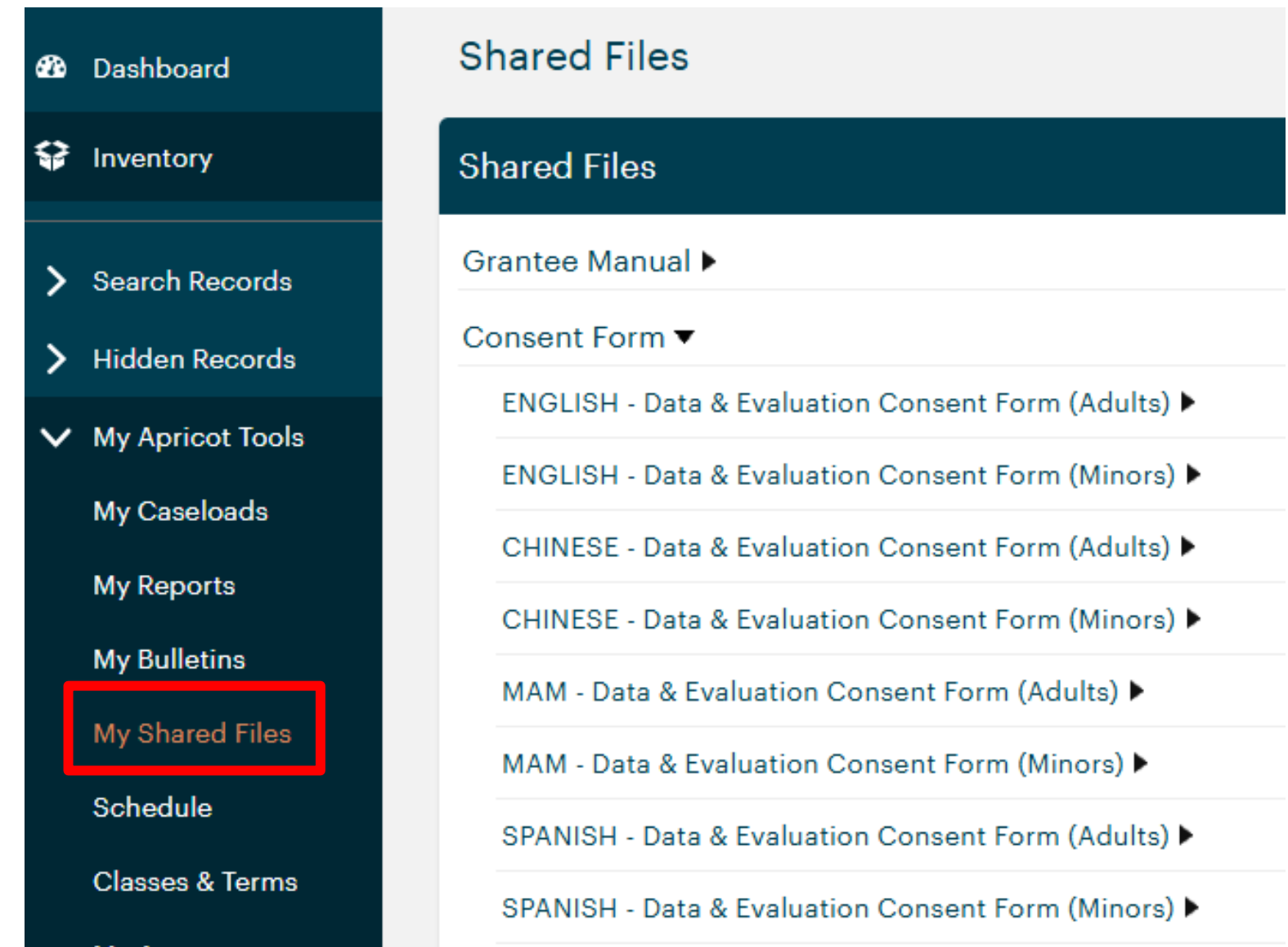
Once a participant enrolls in ongoing services, present the consent form to them within 30 days. There are three versions of the consent form based on the participant's age and the type of service they are receiving:

- Group violence services for adults
- Gender-based violence services for adults
- Any services for youth (under 18)

# Accessing consent forms

Use [this link](#) to access an electronic version of the consent form.

Paper versions and translations are available in Apricot under "My Shared Files."



The screenshot displays the Apricot system interface. On the left is a dark teal sidebar with a navigation menu. The menu items are: Dashboard, Inventory, Search Records, Hidden Records, My Apricot Tools (expanded), My Caseloads, My Reports, My Bulletins, My Shared Files (highlighted with a red box), Schedule, and Classes & Terms. The main content area on the right is titled 'Shared Files' and contains a list of files under the heading 'Consent Form'. The list includes: ENGLISH - Data & Evaluation Consent Form (Adults), ENGLISH - Data & Evaluation Consent Form (Minors), CHINESE - Data & Evaluation Consent Form (Adults), CHINESE - Data & Evaluation Consent Form (Minors), MAM - Data & Evaluation Consent Form (Adults), MAM - Data & Evaluation Consent Form (Minors), SPANISH - Data & Evaluation Consent Form (Adults), and SPANISH - Data & Evaluation Consent Form (Minors).

# Explaining consent forms

## What & Why

- The consent form asks if it is okay to share information about services you receive with researchers who study programs like this one to make sure they are helping people.
- Studies help programs like this one continue get funding.

## Privacy

- Your name and the information will never be shared with anyone other than the funder (the DVP) and researchers.

## Optional

- Agreeing to the consent form is your choice – you can still get services if you do not agree.

# Explaining consent forms

## What & Why

- For youth and adults receiving gender-based violence services, the consent form also asks if it is okay to enter personally-identifiable information like your name and date of birth in a safe database that staff use to provide high-quality services to you.

## Privacy

- The only people who will have access to this information are our agency's staff and a few staff from the DVP who are trained in data privacy.

## Optional

- Agreeing to the consent form is your choice – you can still get services if you do not agree.



# Service Notes Form



# Service Notes Form

**Step 1:** Click the “+” button next to “Service Notes” in the participant’s folder to enter the date and outcome of every contact with a participant, whether attempted or successful.

All Documents	<input type="checkbox"/> Expand Multiline	<input type="text" value="Search Forms"/>
+ Program Enrollment (1 record)		
+ Ceasefire (1 record)		
+ Intake and Needs Assessment (2025) (0 records)		
+ Intake and Needs Assessment (pre-2025) (0 records)		
+ Pulse Assessment (0 records)		
+ Service Notes (1 record)		
+ Referral (1 record)		
+ Life Map Goals (0 records)		
+ Incentives (0 records)		
+ Housing (0 records)		
+ Employment (0 records)		
+ Family and Victim Support (0 records)		



# Service Notes Form

**Step 2:** Complete all information on the service notes form. Then click “Save Record” on the right side of the screen.

A screenshot of a web-based form titled "Service Notes Form". The form is displayed within a dark teal header bar that says "Main" with a dropdown arrow. The form fields are as follows:

- \*Date of Service:** A date input field containing "08/22/2025" with a calendar icon to its right.
- \*Service Provided:** A dropdown menu currently showing "--Please Select--". Below it, a red error message reads "This field is required."
- \*Contact Method:** A group of four radio button options: "In-person", "Phone", "Text", and "No contact".
- Who was the meeting with?:** A group of six radio button options: "Participant only", "Participant and family", "Family member of participant only", "Participant and other service provider", "Other service provider only", and "Other".
- \*Duration of Service in Minutes:** A numeric input field containing "00".
- \*Service Notes:** A large text area with the placeholder text "Notes".



# Recommended Reports



# Recommended Reports

Report with link	Information provided by report
<a href="#"><u>Crisis Navigation Report</u></a>	This report provides all crisis navigation form information within a specific date range.
<a href="#"><u>Individual Client Report</u></a>	This report provides all details about a specific participant, including all of their service notes.
<a href="#"><u>Service Notes and Hours Report</u></a>	This report provides all service notes and hours within a specific date range.