

## Apricot Data Entry Instructions

# Hospital-Based Intervention

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# Deliverables



# Deliverables

- Number of individuals visited.
  - % of individuals who accept short-term case management services.
- Number of individuals served (through short-term case management).
  - % of participants in short-term case management services who receive at least 1 in-person contact per week.
  - % of participants in short-term case management services who receive at least 3 total contacts per week.
  - % of participants in short-term case management services who receive a referral to life coaching.



# Hospital Response Form



# Hospital Response

**Step 1: Enter a Hospital Response Form** for each individual visited at the hospital.

A screenshot of a web application interface for entering a hospital response form. The interface is divided into a dark blue sidebar on the left and a main content area on the right. The sidebar contains a list of navigation options: Dashboard, Inventory, Search Records, Site Profile, Participant, Crisis Navigation, DVP Consent Form, Emergency Relocation Referral Form, Group, Activity/Event, Hospital Response (highlighted with a red box), Employer Profile, NACT Outreach, and Shooting and Homicide Incident. The main content area is titled "Hospital Response" and contains a form with the following fields: "Date of Initial Notification" (MM/DD/YYYY), "Initials of Person Visited" (First, Middle, Last), "Hospital Location" (dropdown), "Was the person already discharged?" (radio buttons for Yes/No), "Person Visited - Gender" (dropdown), "Person Visited - Age" (text input), "Person Visited - Race" (dropdown), "Date of initial visit" (MM/DD/YYYY), "\*Duration of first visit" (text input), and "Notes" (text area).



# Hospital Response

**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 **Hospital Response 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



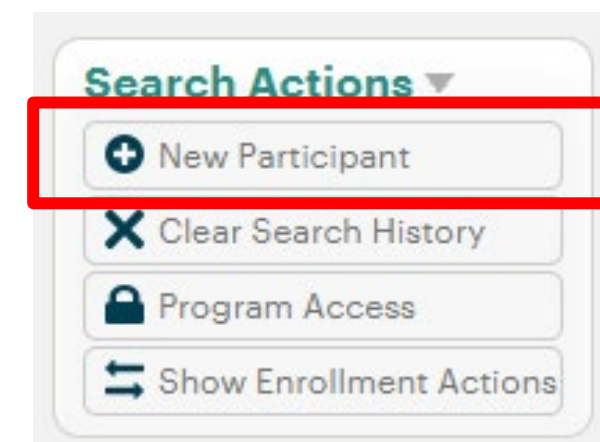
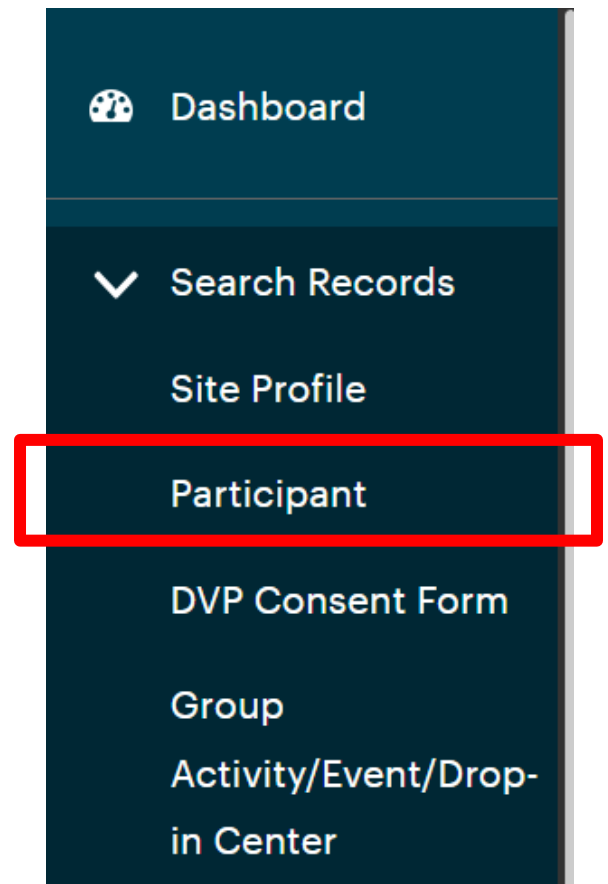
# Participant Records



# 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.”


Participant Details ▾

**\*Name**   
First  Middle  Last

**\*Date of Birth**   
MM/DD/YYYY 

**Primary Phone**  
   ext.

**Emergency Contact Name**

**Address Lookup**  Select to map   
No results found








**Address**  
Line 1   
Line 2

**Email**

**Secondary Phone**  
   ext.

**Emergency Contact Phone**  
   ext.

Record Options ▾

-  Save Record
-  Print Mode
-  Archive Record
-  View History
-  New Participant
-  View Folder
-  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.

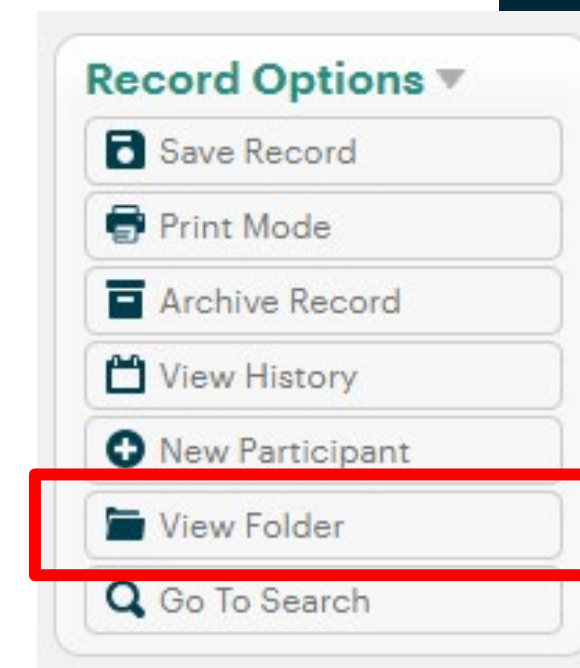
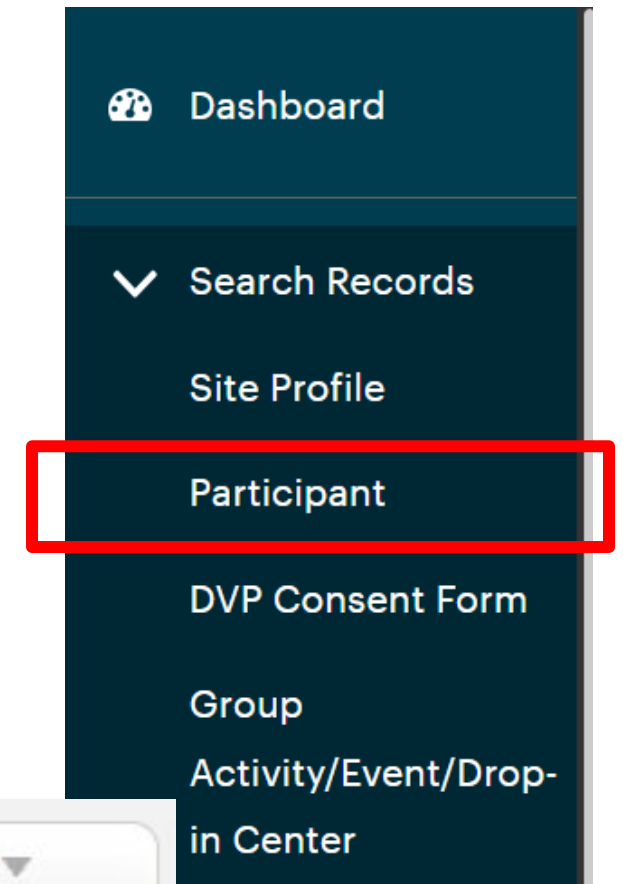
Complete [this form](#) to have the person added to your site.



# 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.

A screenshot of a web application interface showing a list of folders for a participant. The interface includes a header with "All Documents", an "Expand Multiline" checkbox, and a "Search Forms" search bar. The list contains the following folders: 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), and Family and Victim Support (0 records). A red rectangular box highlights the "+" icons in the right-hand column of the folder list, which are used to add new 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



# Enrolling a Participant

**Step 3:** Complete the eligibility screener to confirm that someone is eligible for DVP-funded services. Staff members do not need to ask these questions directly but can gather the information through general conversation or prior knowledge. Individuals must meet 2 of the criteria to be eligible for DVP-funded services.

## Adult Eligibility Screener ▼

Individuals enrolling in DVP life coaching must meet criterion 1 plus 2 more.  
Individuals enrolled in CBO programs must meet 2 of any criteria.  
If the individual is eligible, a label will appear.

**\*Is the individual connected to a street crew or group? (adult)**

- Yes
- No
- Don't Know

**\*Does the individual have a history with the criminal or juvenile justice system? (adult)**

- Yes
- No
- Don't Know

**\*Has the individual ever been intentionally shot, stabbed, or shot at? (adult)**

- Yes
- No
- Don't Know

**\*In the past six months, has a close friend, family member, or group member of the individual been shot or arrested for a shooting? (adult)**

- Yes
- No
- Don't Know

This person is eligible for CBO life coaching and support services.



# Exiting a Participant

**Step 4:** 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

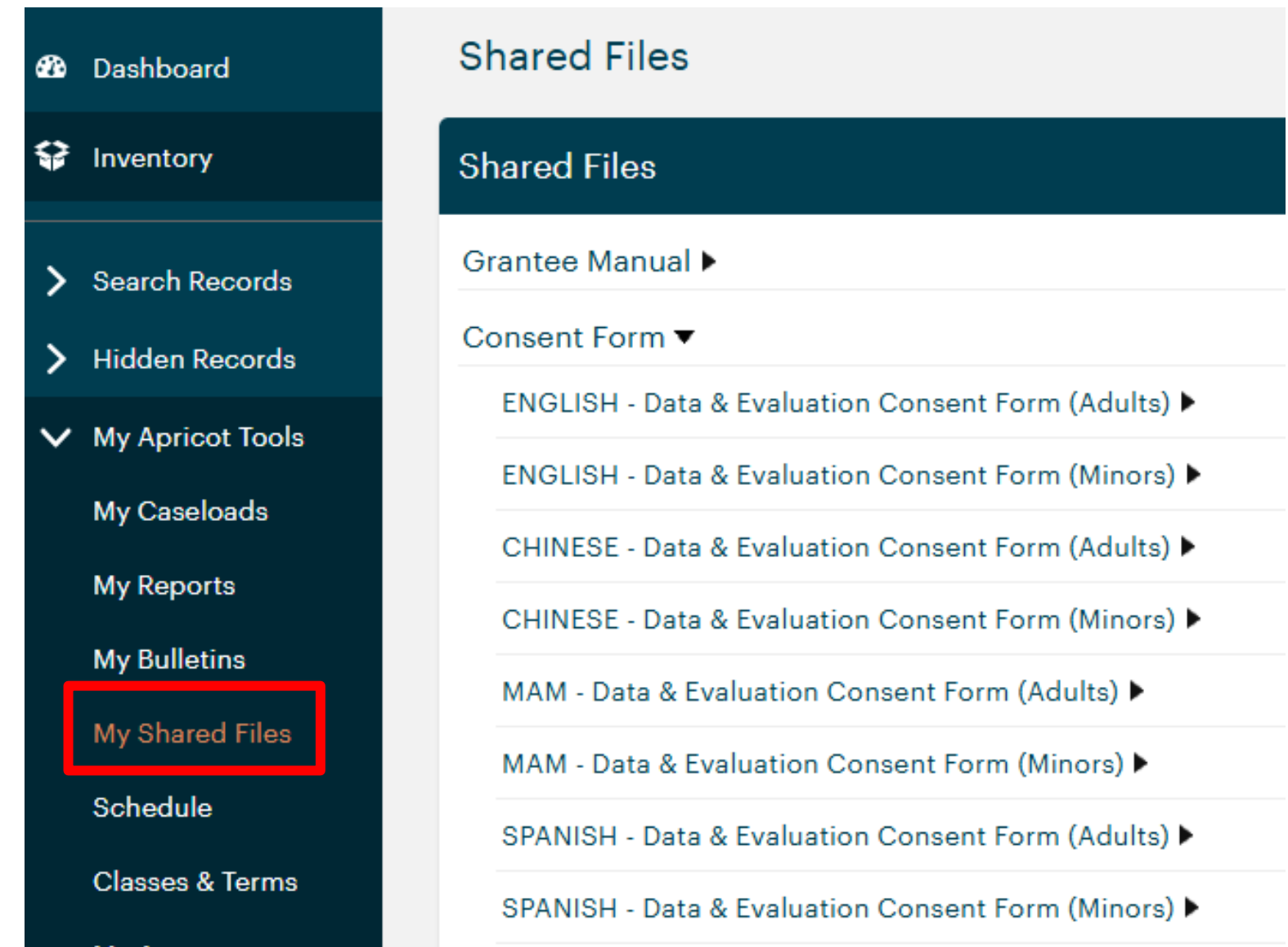
Once a participant enrolls in ongoing services, present the consent form to them within 30 days. There are three versions of the consent form based on the participant's age and the type of service they are receiving:

- 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. On the right is the main content area, titled 'Shared Files'. It features a dark teal header with the text 'Shared Files'. Below this, there is a list of items: 'Grantee Manual' with a right-pointing arrow, and 'Consent Form' with a downward-pointing arrow. Under 'Consent Form', there are ten entries, each with a right-pointing arrow: '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

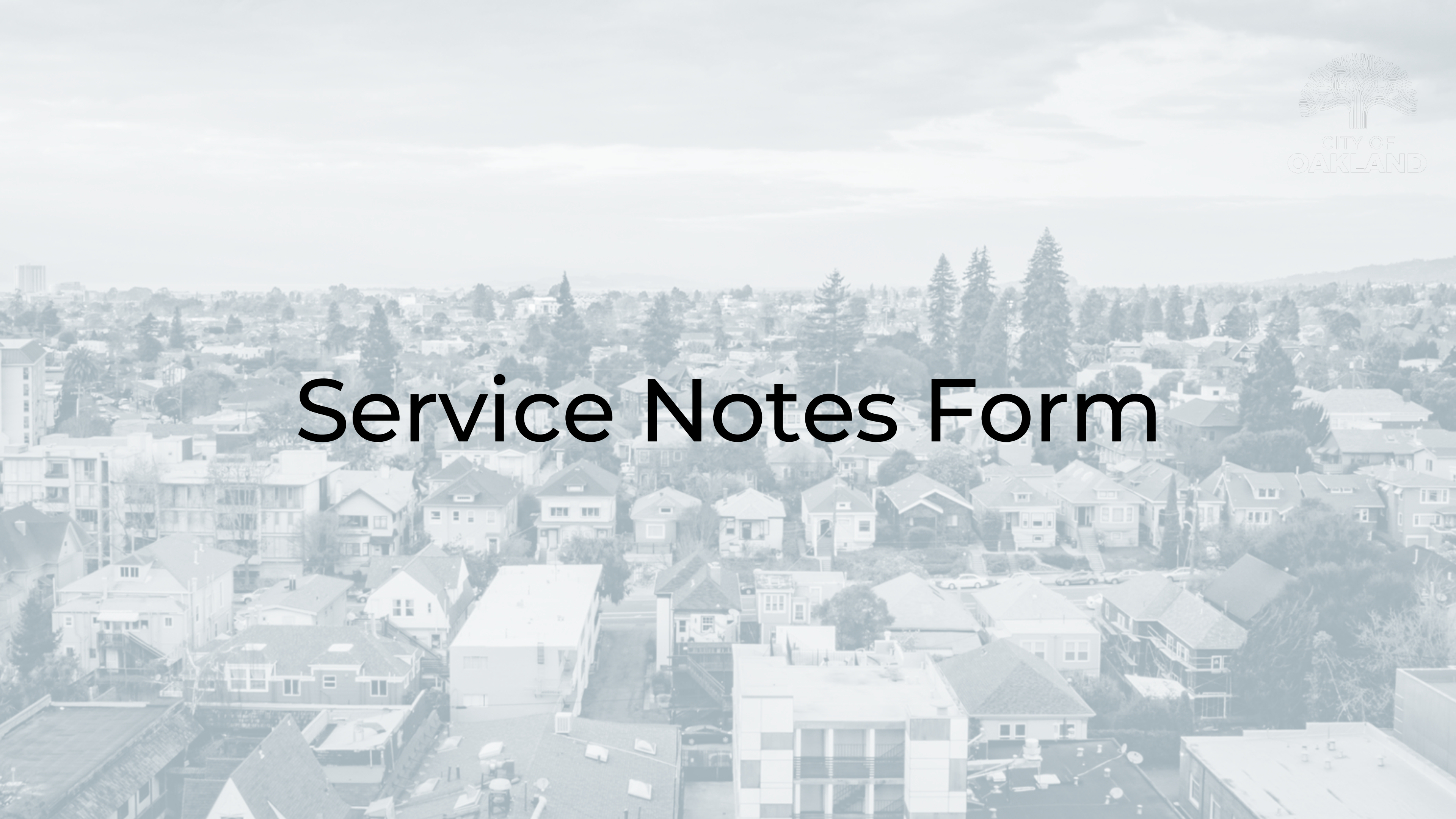
- The only people who will have access to this information are our agency's staff and a few staff from the DVP who are trained in data privacy.

## 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 text input field containing "00".
- \*Service Notes**: A large text area with the placeholder text "Notes".



# Referral Form





# Referral Form

**Step 1:** Click the “+” button next to “Referral” in the participant’s folder to document a referral to services.

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)		



# Within the DVP Network

**Step 2:** If the referral is to an agency funded by the DVP, select “Within DVP network” and then indicate the agency and program you are referring to by clicking the “+ Add” button. You can choose whether to send an automated email to the program contact at that agency. Then click “Save Record” on the right side of the screen.

Internal or External Referral ▾

\*Date of Referral  
11/15/2024 📅

**\*Is this referral to an agency within the DVP network or outside of the DVP network?**

Within DVP network  
 Outside of the DVP network

Within DVP Network ▾

Agency Referring To

Hide Deactivated Links + Add

Organization Name 🔒

Agency Contact for Referral

First  Middle  Last

Email for Referral

**OPTIONAL - Would you like to send an email to the contact at this agency to notify them of the referral?**

Yes  
 No

Please Note: If you opt to send an email, the program contact for that program and DVP staff will receive the message. DVP staff will then transmit the participant file to the agency they are being referred to.



# Outside the DVP Network

**Step 2:** If the referral is to an agency NOT funded by the DVP, select “Outside of the DVP network.” Then select the type of referral (housing, employment, etc.) and enter the name of the agency. Lastly, click “Save Record” on the right side of the screen.

Internal or External Referral ▾

**\*Date of Referral**  
11/15/2024 📅

**\*Is this referral to an agency within the DVP network or outside of the DVP network?**

Within DVP network  
 Outside of the DVP network

Outside of DVP Network ▾

**Type of Referral**  
--Please Select-- ▾

**Name of Agency Referred To (outside the DVP Network) ?**

**Referral Notes**  
Notes



# Recommended Reports



# Recommended Reports

Report with link	Information provided by report
<a href="#"><u>Hospital Response Report</u></a>	This report provides all hospital response data, including all participants served through short-term case management and service hours within a specified time 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.