

Apricot Data Entry Instructions

Housing

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Deliverables



Deliverables

OHA Housing

- Number of individuals served.
- Percentage of completed applications submitted to OHA within 4 weeks of referral.
- Percentage of participants who receive at least 1 contact per week.

Emergency housing

- Number of individuals who access emergency housing.
- Percentage of individuals who have secured transitional or permanent housing upon ending services.

Transitional housing

- Number of individuals served.
- Percentage of participants who receive at least 1 contact per week.
- Percentage of individuals who have secured permanent housing upon ending services.



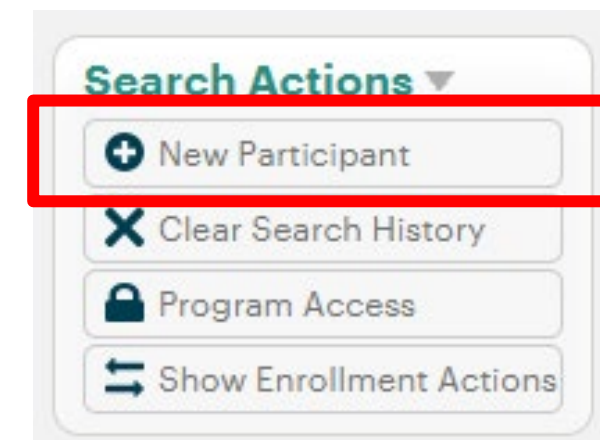
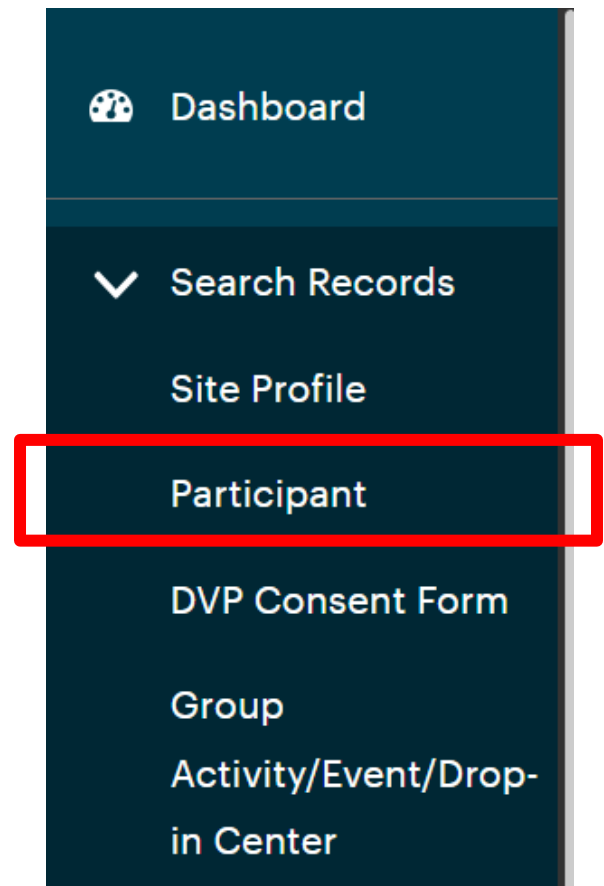
Participant Records



Creating a Participant Record

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

Step 2: Select “+ New Participant” button 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.

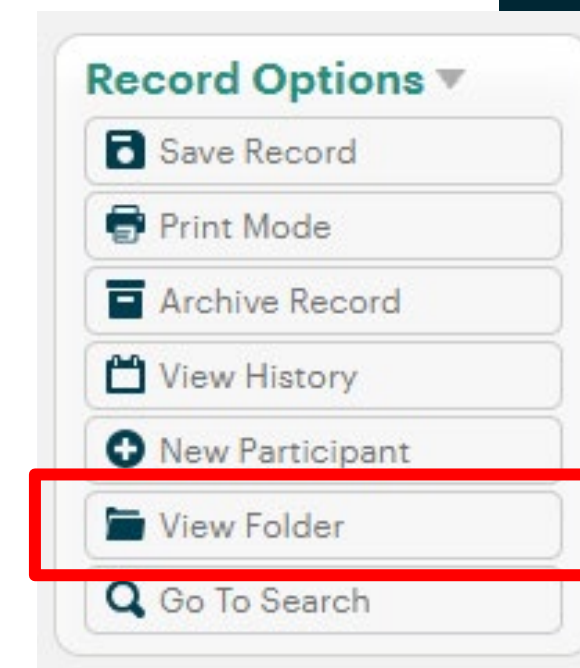
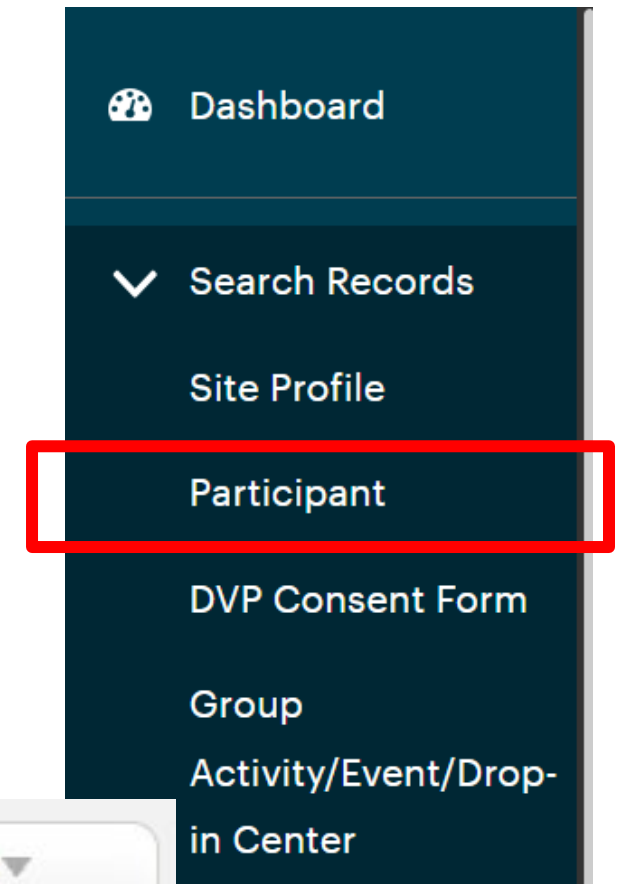
Complete [this form](#) to have the person added to your site.



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.

All Documents		<input type="checkbox"/> Expand Multiline	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



Enrolling a Participant

For Abode only: Return to the Program Enrollment Form when a housing application has been submitted to the Oakland Housing Authority (OHA) to complete information on date of submission.

Enrollment ▼

***Program Enrolling**
Abode - Adult Life Coaching (Housing Focused) ▼

***Agency**
--Please Select-- ▼

***Start Date**
MM/DD/YYYY 📅

***Referral Source**
--Please Select-- ▼

Enrollment Notes
Notes

Has application been submitted to OHA?
 Yes
 No

Date application submitted to OHA
MM/DD/YYYY 📅



Exiting a Participant

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

Exit ▾

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

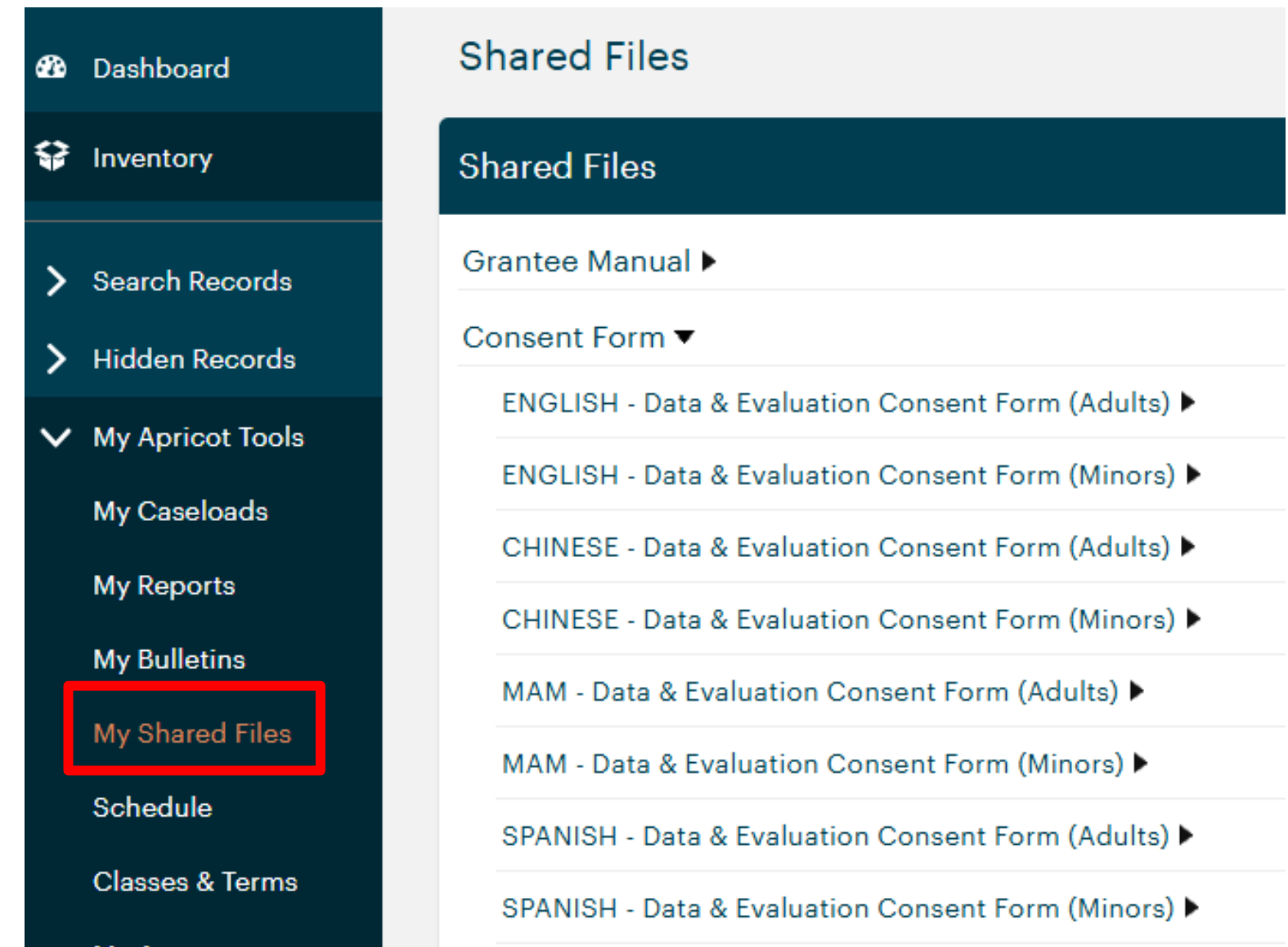
- Group violence services for adults
- Gender-based violence services for adults
- Any services for youth (under 18)



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."



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".



Housing Form



Housing Form

Step 1: Click the “+” button next to “Housing” in the participant’s folder to enter a **Housing Form** when a participant receives housing 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 (2 records)		
+ Referral (2 records)		
+ Life Map Goals (0 records)		
+ Incentives (0 records)		
+ Housing (0 records)		
+ Employment (0 records)		
+ Family and Victim Support (0 records)		



Housing Form

Step 2: Select the appropriate response for “Housing support provided.” Depending on the selection, different follow-up questions will appear.

Main ▾

***Housing support provided**
Relocation assistance ▾

***Date funding disbursed**
MM/DD/YYYY 📅
This field is required.

***Amount disbursed**
\$1,000.00
This field is required.

Notes on housing support provided
Notes



Housing Exit

Step 3: For housing services that involve placing a participant in housing (shelter, transitional housing, or OHA housing), return to the **Housing Form** to enter additional information when the placement ends.

Housing End ▼

Housing End Date <input type="text" value="09/17/2025"/>	*Primary reason for end of housing <input type="text" value="Secured new housing"/> ▼
Duration of length of stay <input type="text" value="1"/>	*Current housing status <input type="text" value="--Please Select--"/> ▼ <i>This field is required.</i>

If “Secured new housing” or “Housing program ended” is selected, “Current housing status” will appear.



Recommended Reports



Recommended Reports

Report with link	Information provided by report
<u>Individual Client Report</u>	This report provides all details about a specific participant, including all of their service notes.
<u>Service Notes and Hours Report</u>	This report provides all service notes and hours within a specific date range.
<u>Housing Report</u>	This report provides all housing data during a specific time range, including type of housing and length of stay.