Life Coaching & Youth Diversion

September 2025

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Deliverables

Deliverables

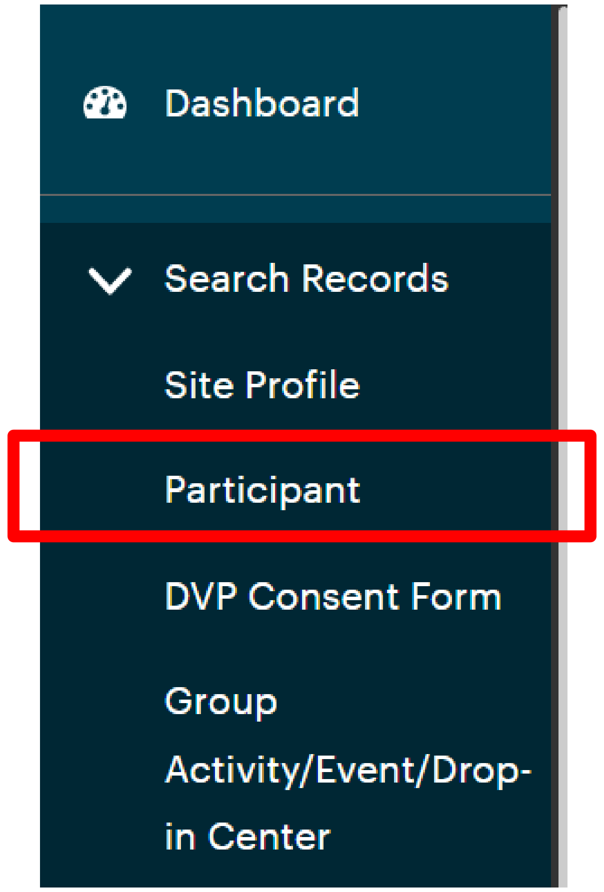
- Number of individuals served
- % of participants who have at least 3 (youth) or 4 (adults) total contacts per week.
- % of participants who have at least 1 in-person contact per week.
- % of participants who develop a life map within 45 days of enrollment.

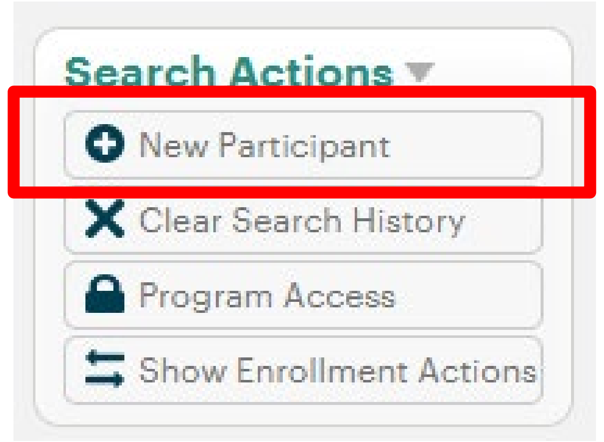
Participant Records

Creating a Participant Record

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

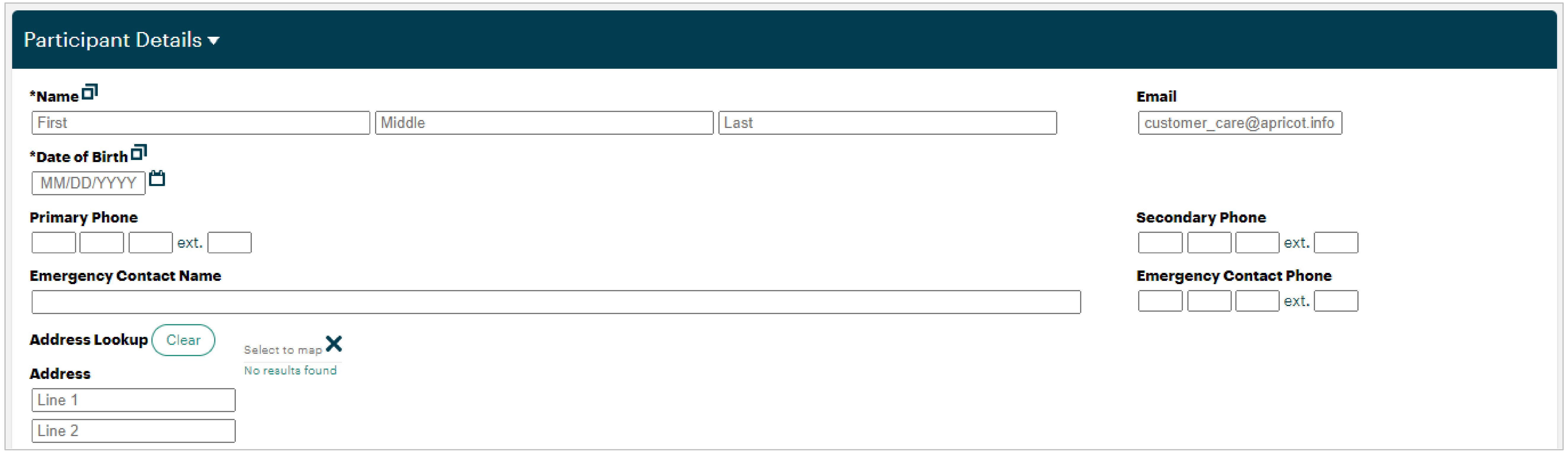
Step 2: Select “+ New Participant” on the right side of the screen.

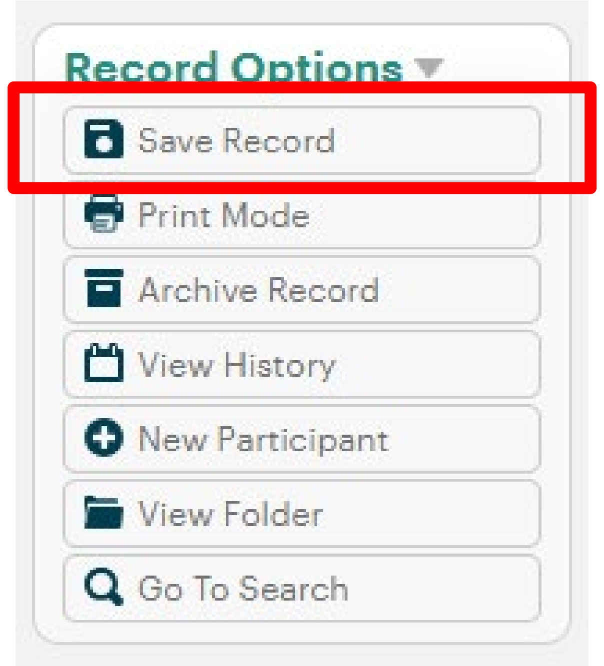




Creating a Participant Record

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





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

Duplicate Records

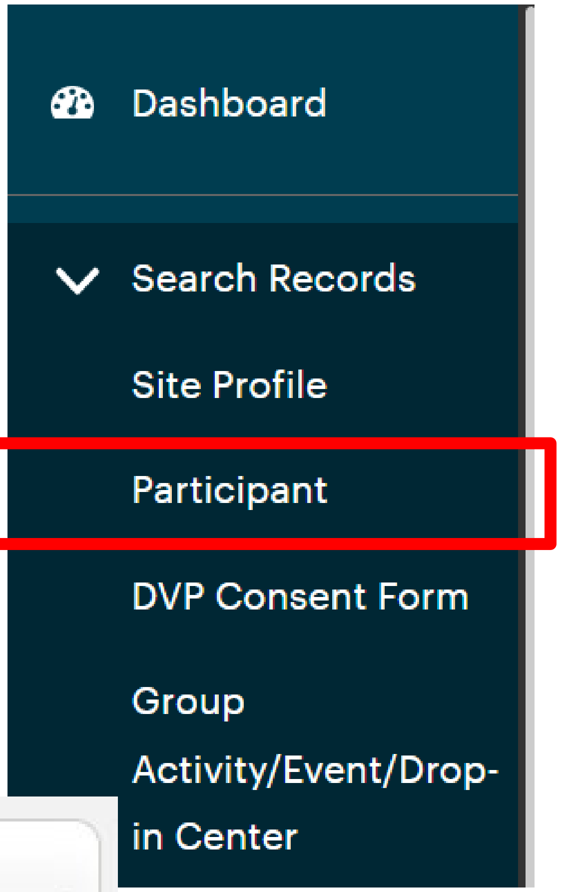
If a person is already in Apricot because they received services from a different agency, a duplicate record message will appear.

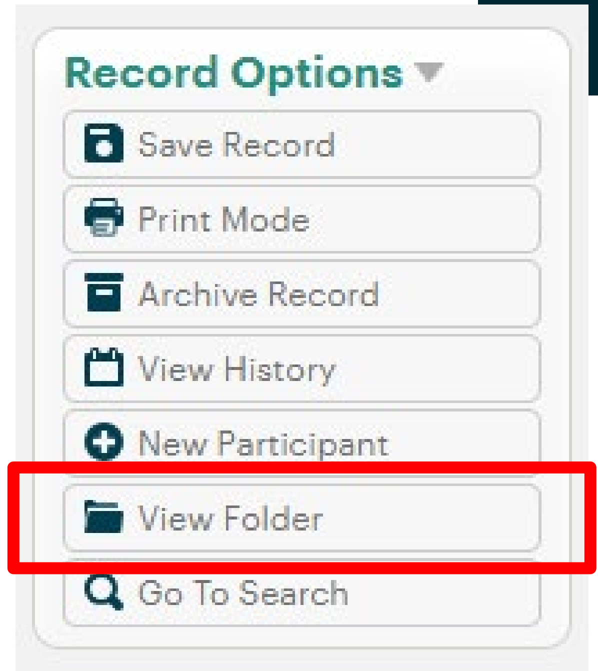
Complete this form to have the person added to your site.

Accessing a Participant's Folder

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

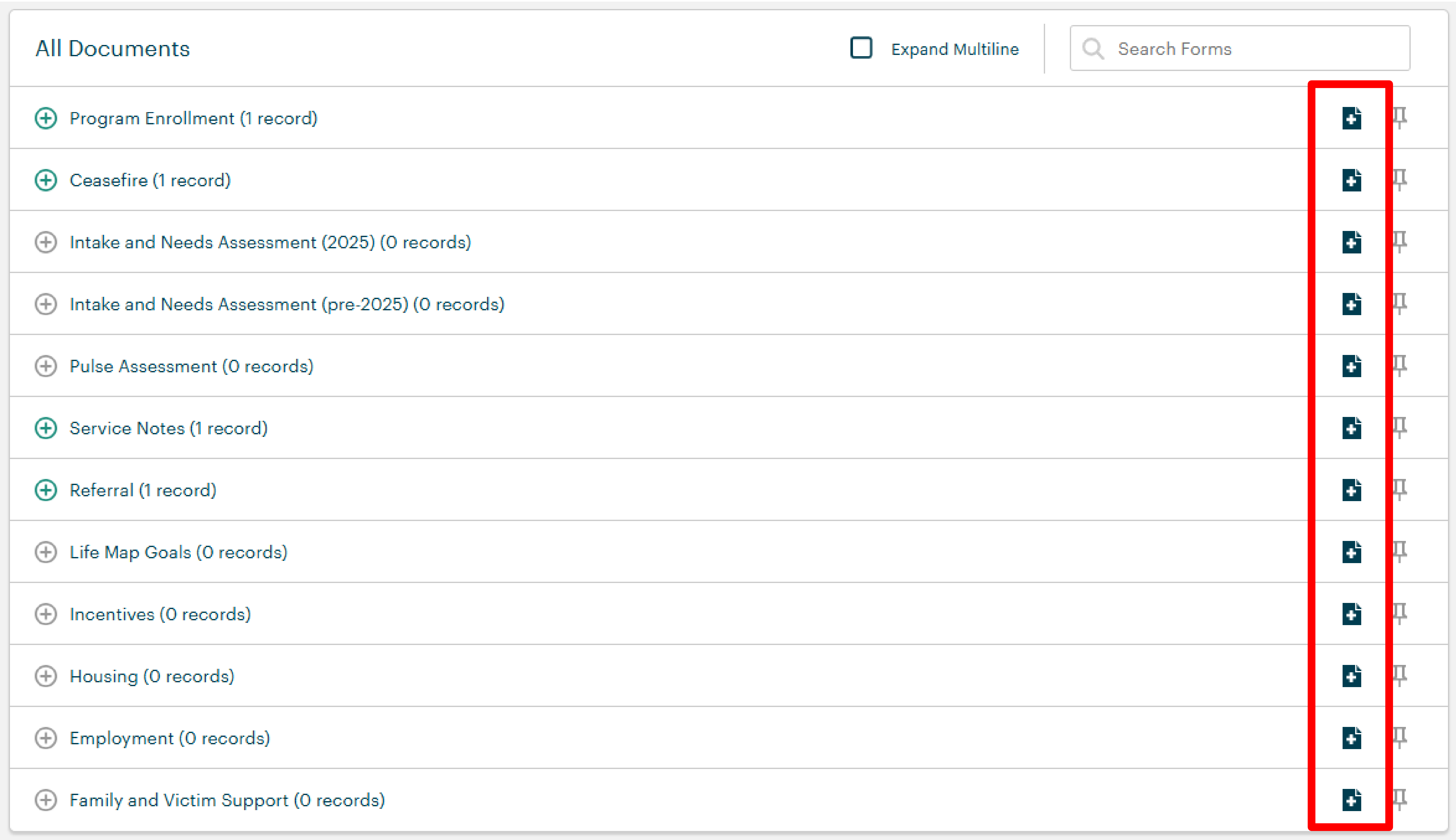
Step 2: Find the participant and click on their name. Then, select "View Folder" on the right side of the screen.





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.

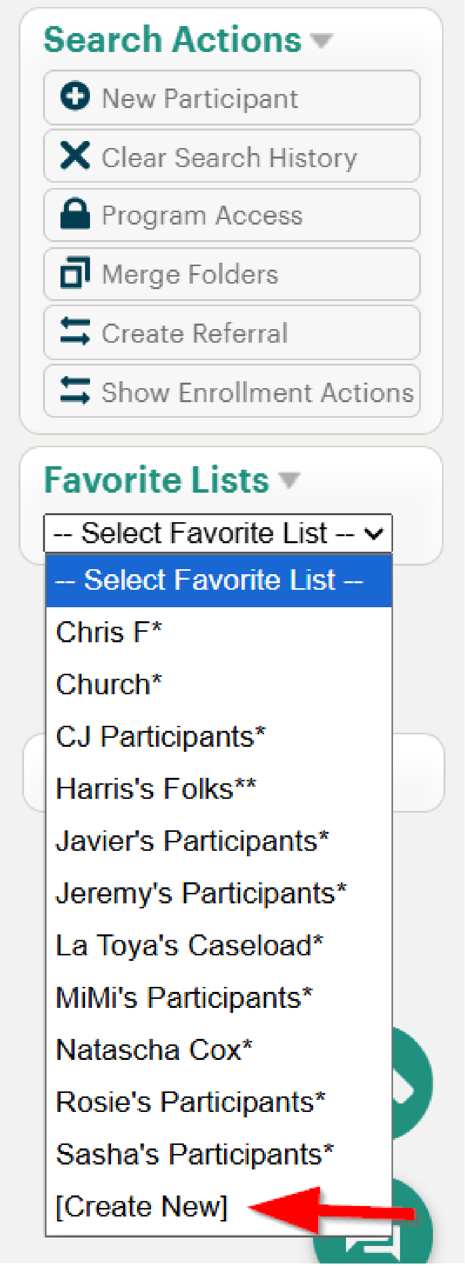


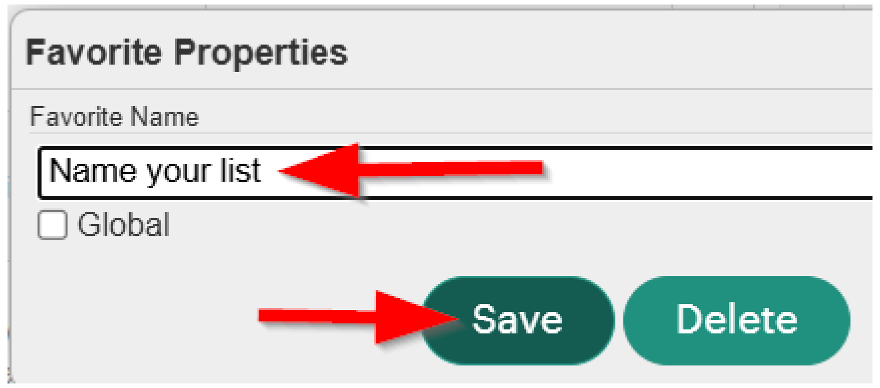
Favorite List

You can create a “favorite list” so you don't have to search for your participants each time you log into Apricot. To do this, follow the steps below.

Step 1: Click on “Select Favorite List” on the right side of the screen and select "[Create New]."

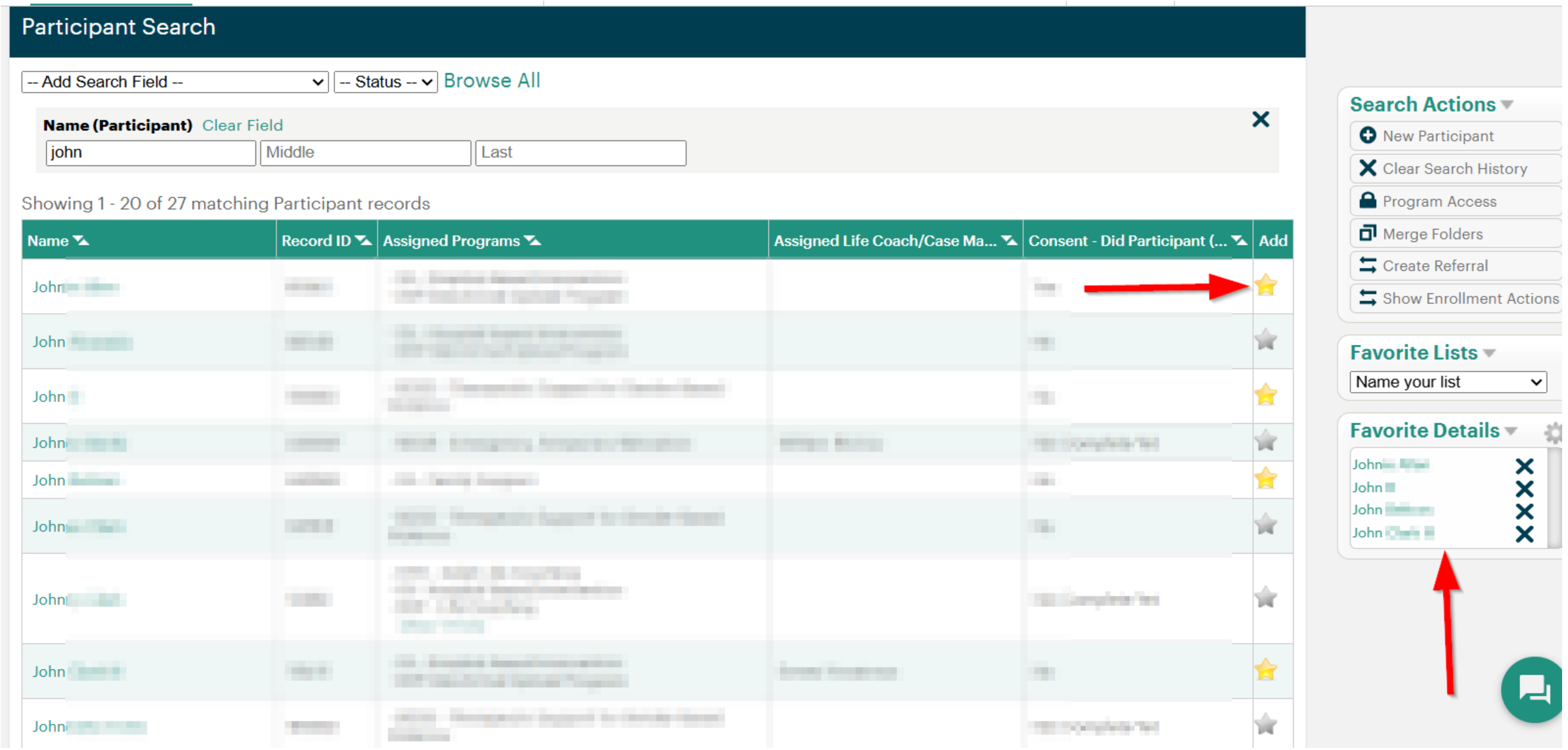
Step 2: Name your list and then click the save button.





Favorite List

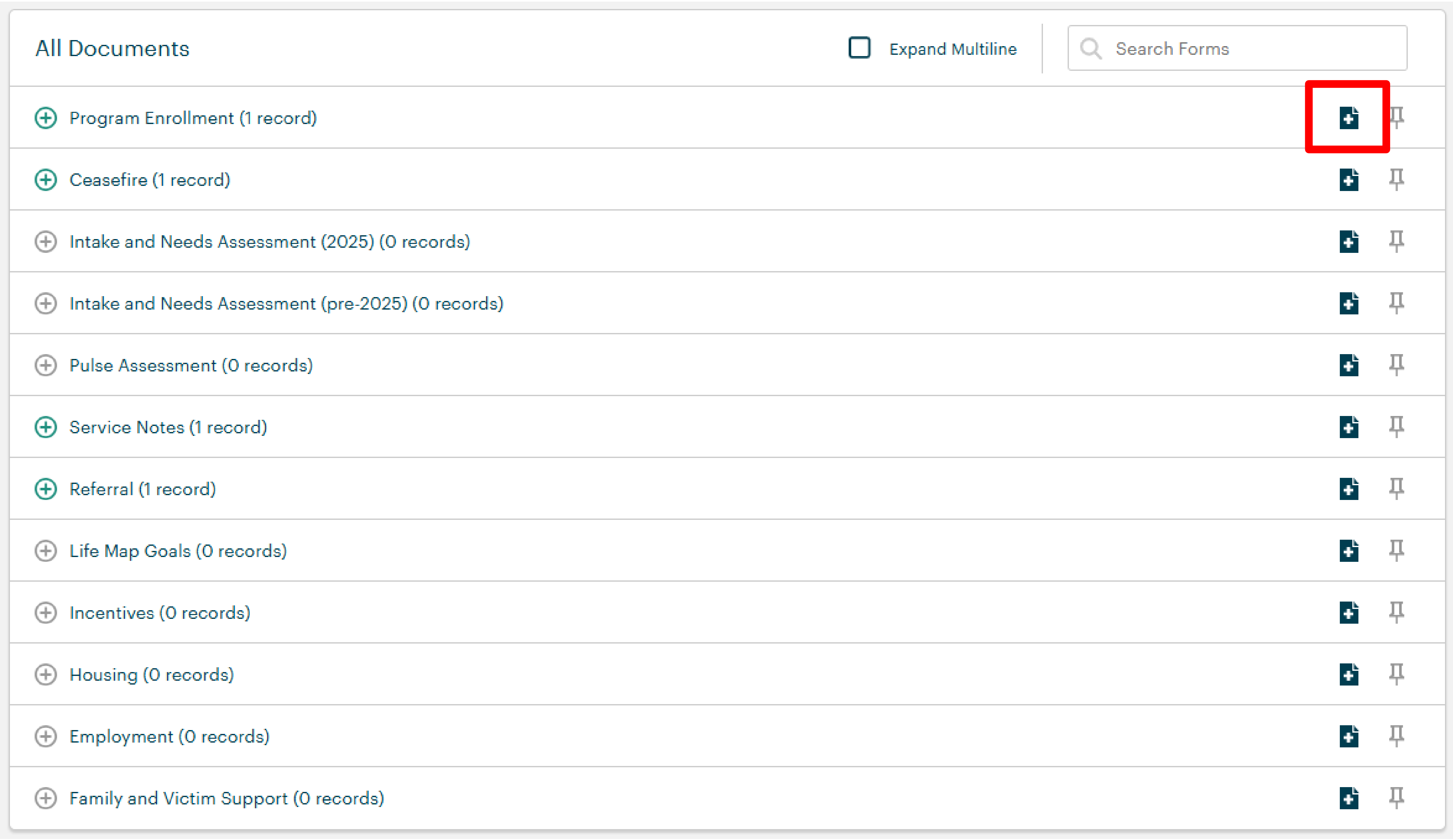
Step 3: You can now search for participants and favorite them by clicking on the star on the righthand side. Your favorite list will display in the "Favorite Details" box on the right. You can click on their name in this box to jump directly to their document folder.



Program Enrollment

Enrolling a Participant

Step 1: Click the "+" button next to "Program Enrollment" in the participant folder.



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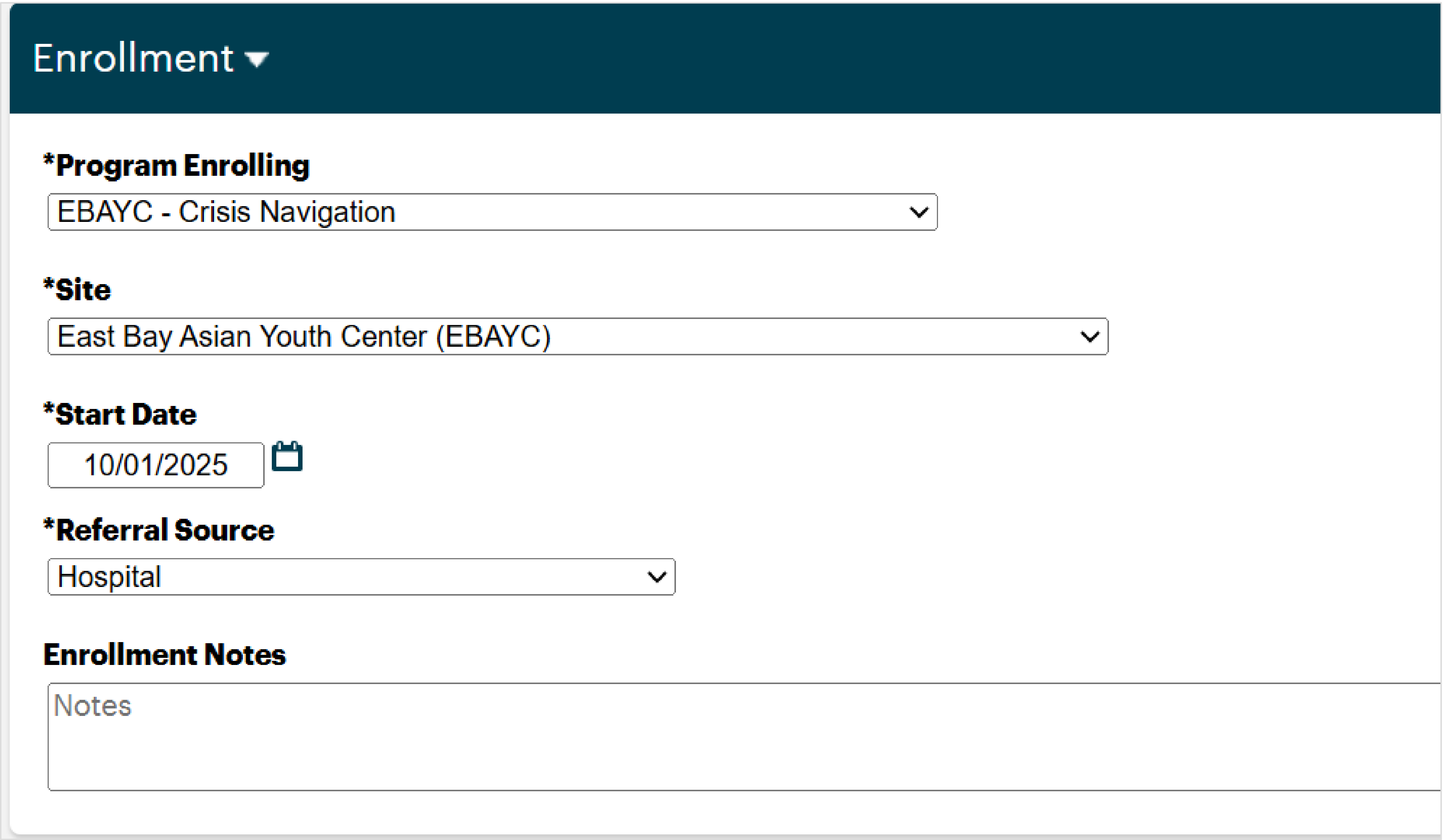
CITY OF OAKLAND

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

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

***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

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


Exit

Exit Date
07/09/2024

*Primary Reason for Exit
--Please Select--
This field is required.

Length of Enrollment in Days
0

Exit Notes
Notes

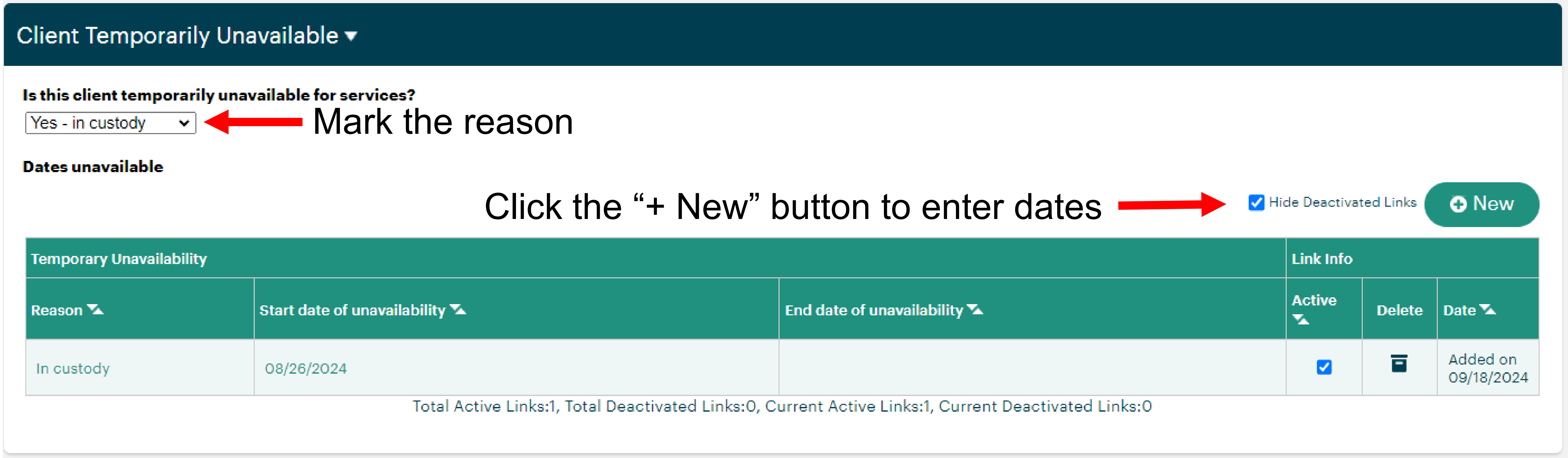
Enter date of last contact.

Select the appropriate exit reason.

This field will auto calculate.

Temporary Pause in Services

If a participant is incarcerated, out of town, or unavailable to participate in services for another reason, use the **Program Enrollment Form** to record a temporary pause in services. This excludes the participant from tabulations regarding weekly contact metrics.


Client Temporarily Unavailable

Is this client temporarily unavailable for services?

Yes - in custody

Mark the reason

Dates unavailable

Click the "+ New" button to enter dates

Hide Deactivated Links

New

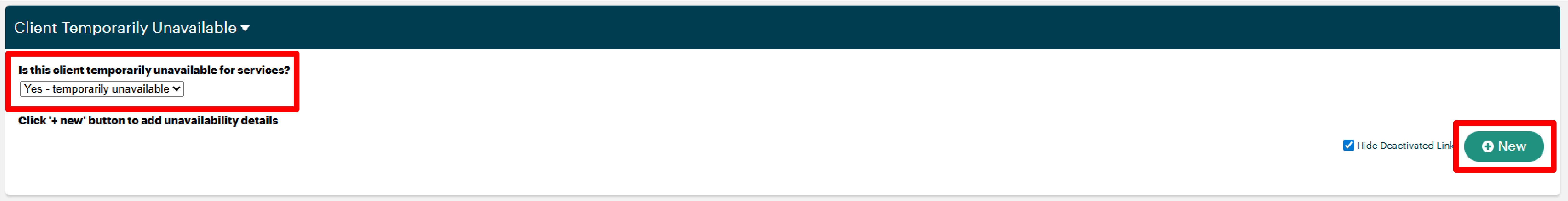
Temporary Unavailability			Link Info		
Reason	Start date of unavailability	End date of unavailability	Active	Delete	Date
In custody	08/26/2024				Added on 09/18/2024

Total Active Links:1, Total Deactivated Links:0, Current Active Links:1, Current Deactivated Links:0

Temporary Pause in Services

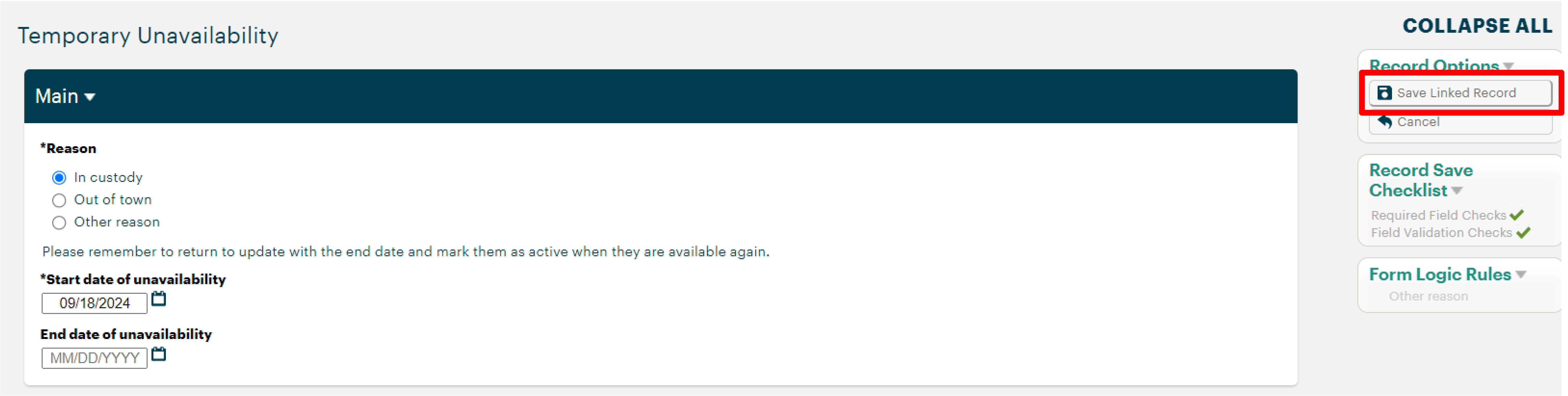
If a participant is temporarily incarcerated, out of town, or unavailable to participate in services for another reason, return to the **Program Enrollment Form** to record a temporary pause in services. This excludes the participant from weekly contact metrics.

Step 1: Select “Yes” for “Is this client temporarily unavailable for services?” and then click “+ New” to add the dates they are unavailable.



Temporary Pause in Services

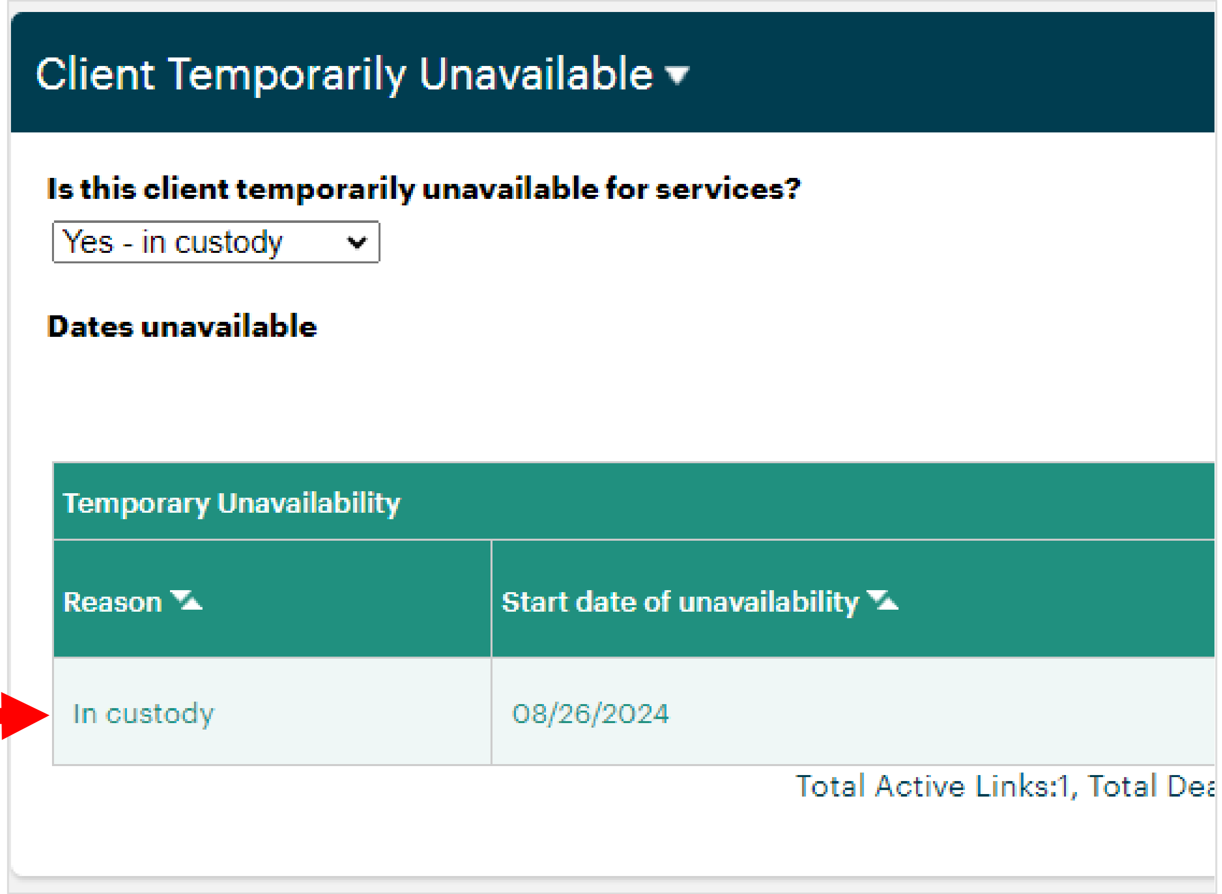
Step 2: Select the reason and start date of the participant's unavailability. Click "Save Linked Record" on the right. Then save the main **Program Enrollment Form** again. **NOTE: This requires saving twice.**

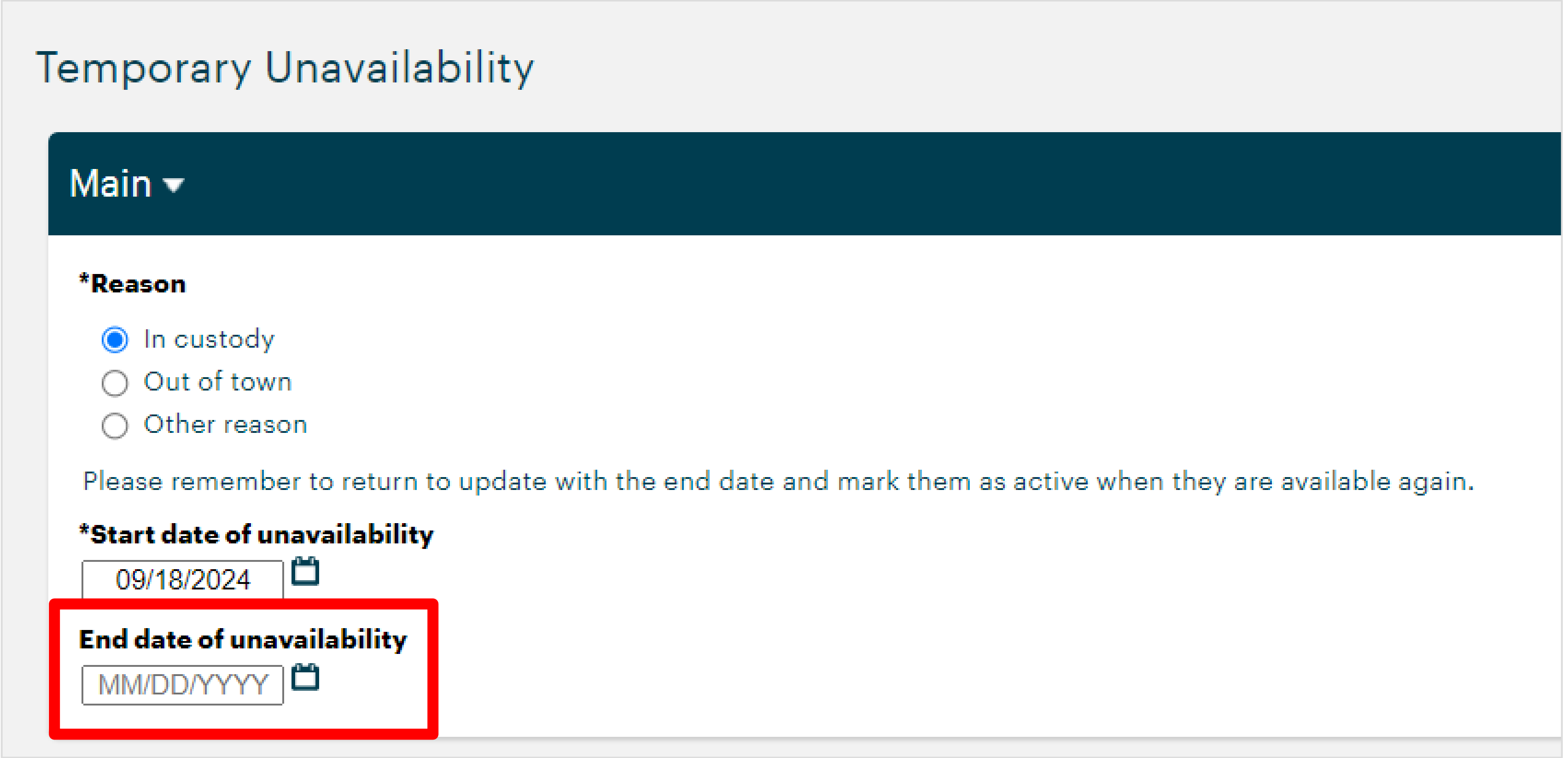


Temporary Pause in Services

Step 3: When a client becomes available again, return to the **Program Enrollment Form**, click on the record listed under “Client Temporarily Unavailable,” and add an end date for their temporary unavailability. Click “Save Linked Record” on the right.

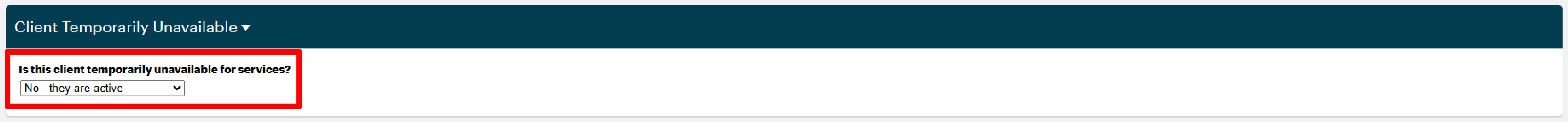
Click here





Temporary Pause in Services

Step 4: Navigate back to the main **Program Enrollment Form**, mark them as active again, and save the program enrollment record.



Consent Form

Types of consent forms

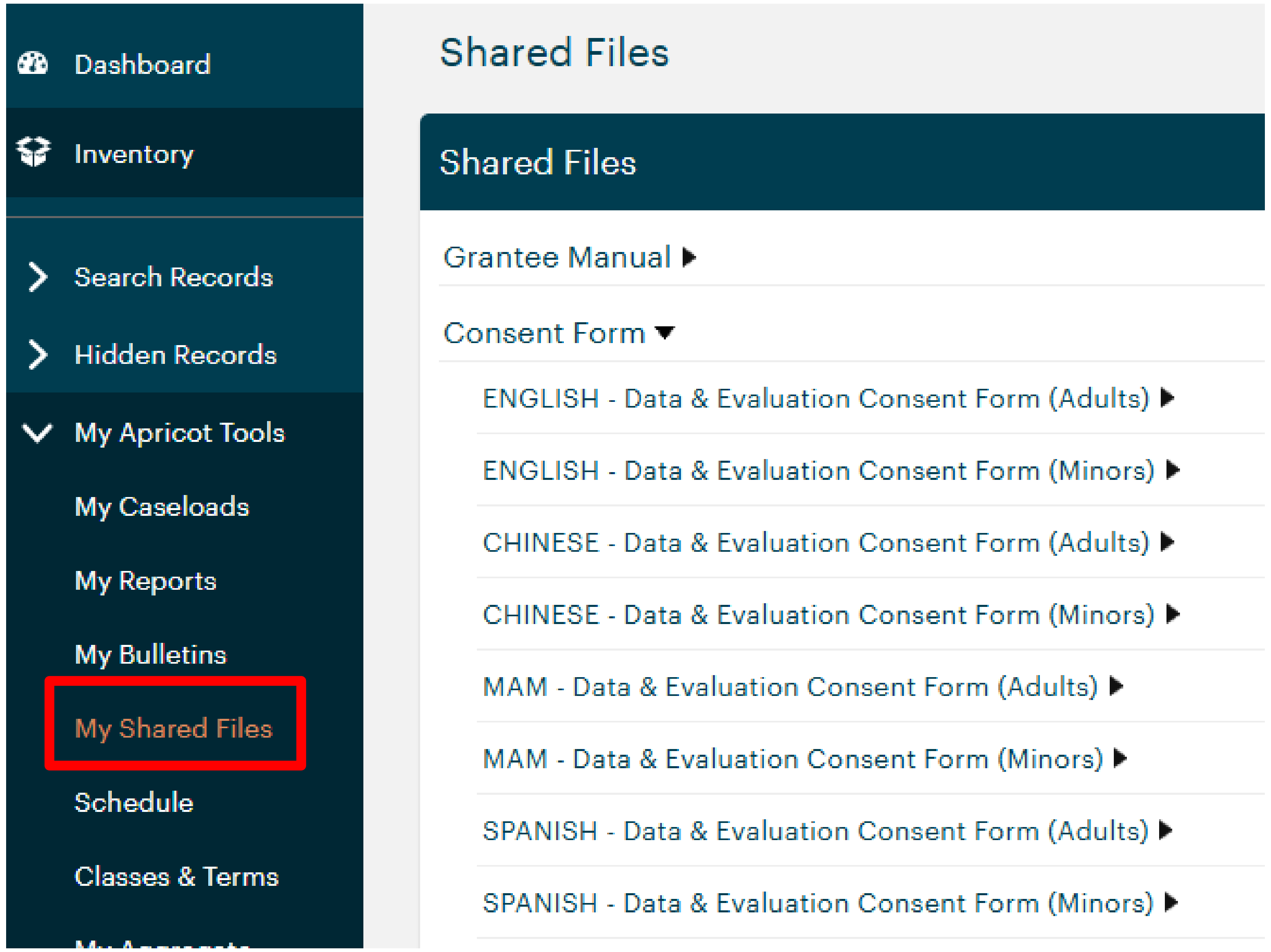
Once a participant enrolls in ongoing services, present the consent form to them within 30 days. There are three versions of the consent form based on the participant's age and the type of service they are receiving:

- 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

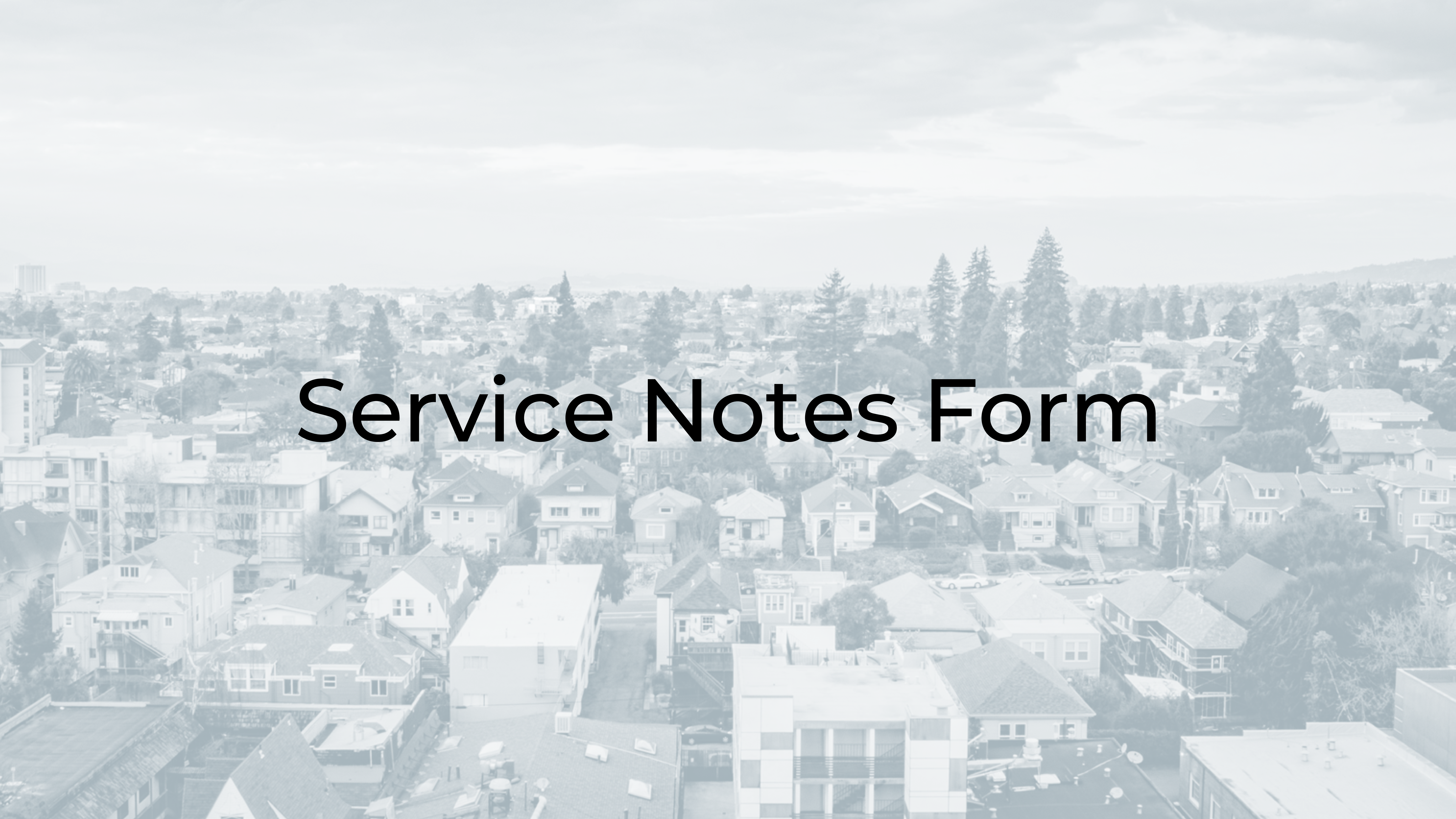
- For youth and adults receiving gender-based violence services, the consent form also asks if it is okay to enter personally-identifiable information like your name and date of birth in a safe database that staff use to provide high-quality services to you.

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

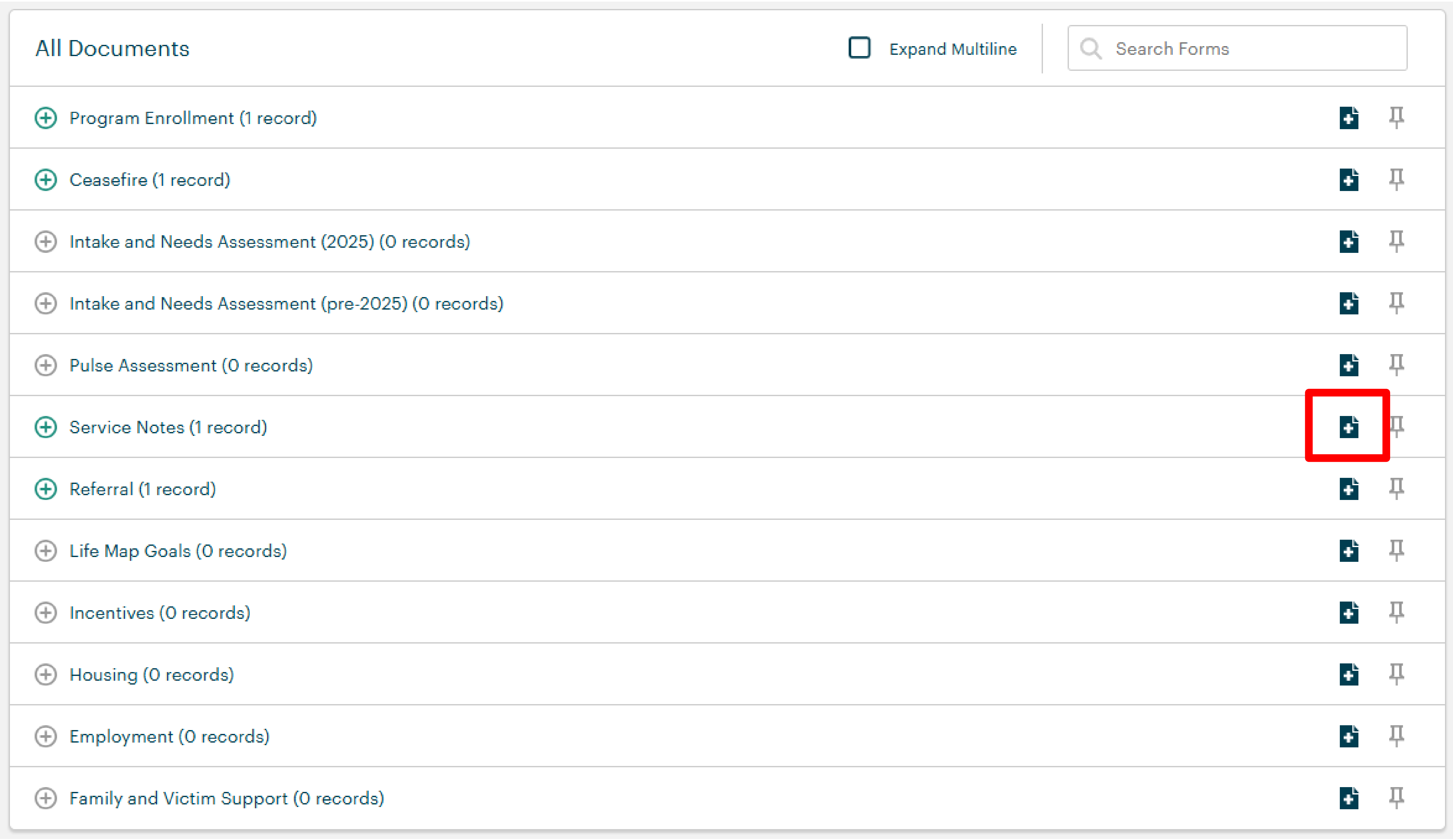
- Agreeing to the consent form is your choice – you can still get services if you do not agree.



Service Notes Form

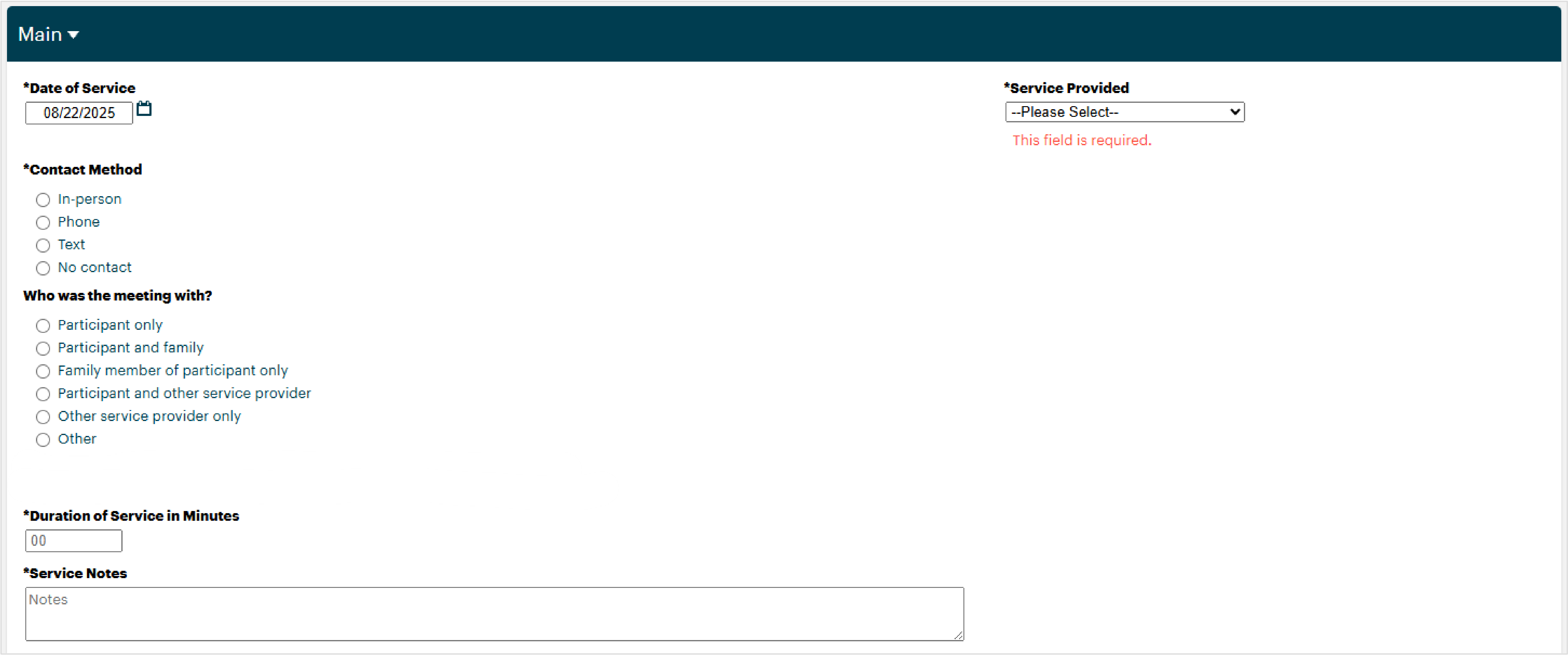
Service Notes Form

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.



Service Notes Form

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


Main

*Date of Service

08/22/2025

*Service Provided

--Please Select--

This field is required.

*Contact Method

- In-person
- Phone
- Text
- No contact

Who was the meeting with?

- Participant only
- Participant and family
- Family member of participant only
- Participant and other service provider
- Other service provider only
- Other

*Duration of Service in Minutes

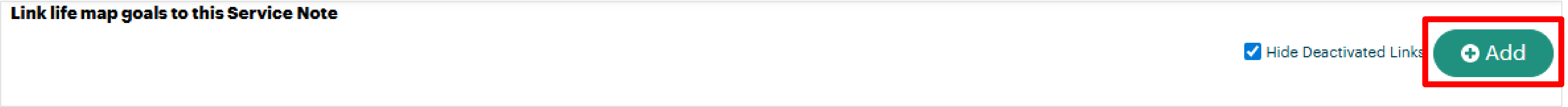
00

*Service Notes

Notes

Service Notes Form

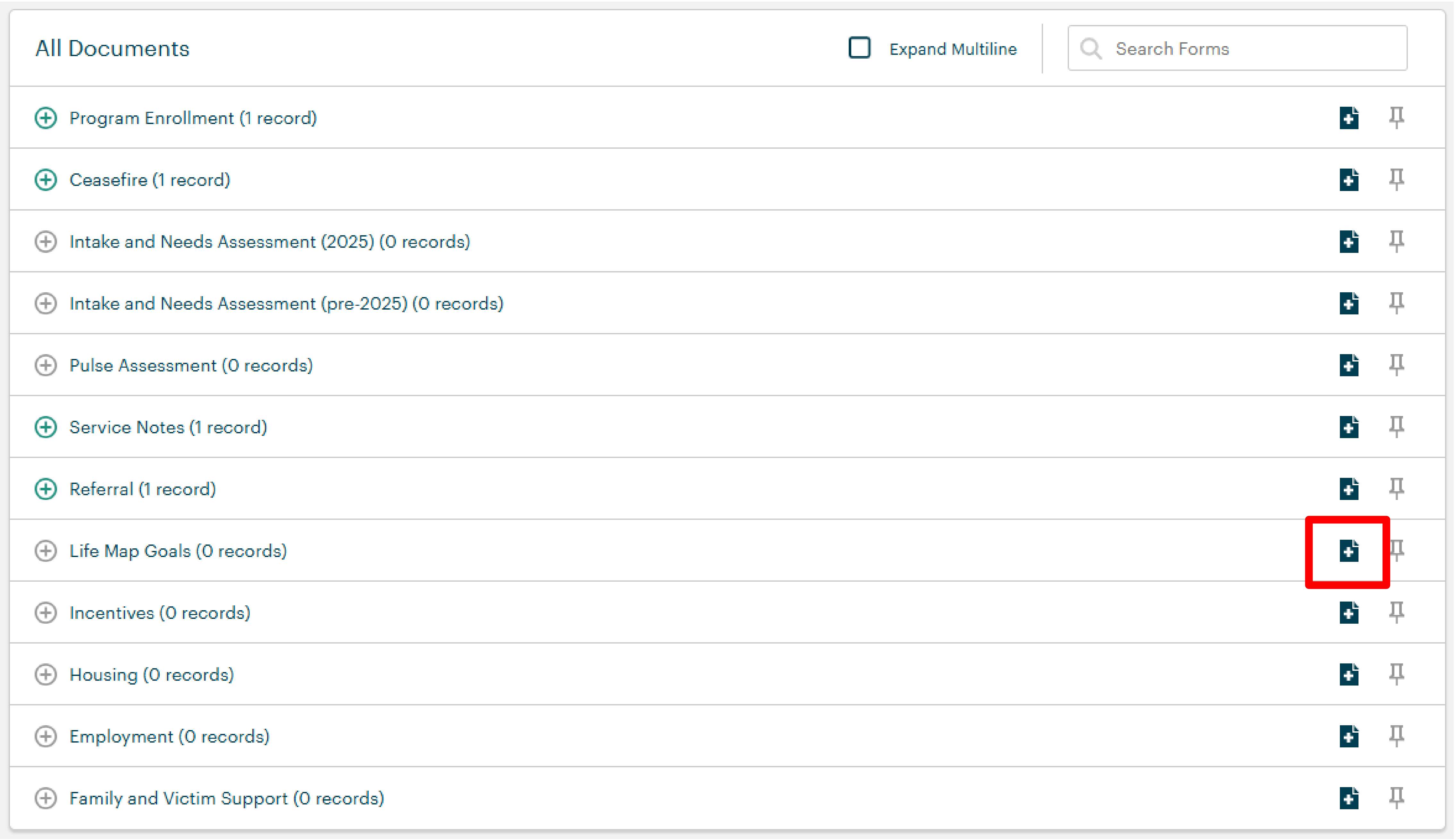
Step 3: If helpful, you can link a **Service Notes Form** to a life map goal by clicking “+ Add” under “Link life map goals to this Service Note.”



Life Map Goals Form

Life Map Goals Form

Step 1: Click the "+" button next to "Life Map Goals" in the participant's folder to enter or update a life map goal.



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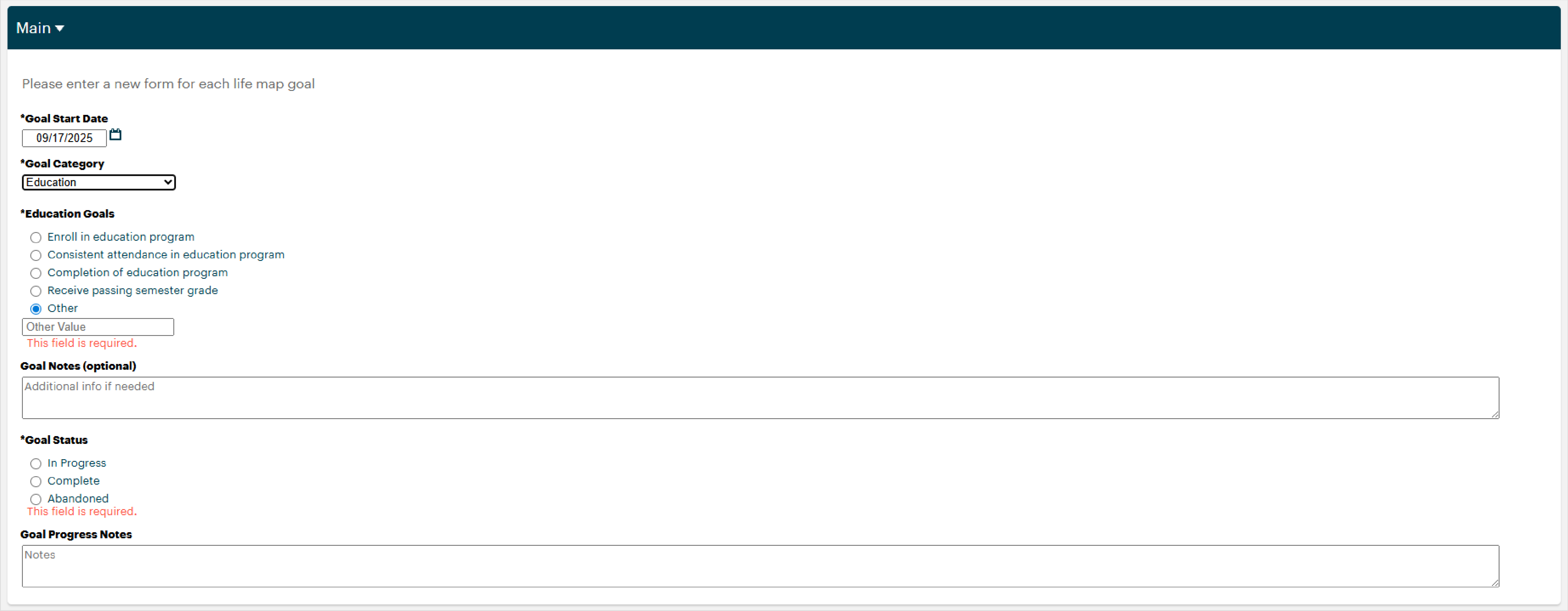
Life Map Goals Form

Step 2: Enter a start date, category, notes, and status for each goal. Return to this form to update it when a goal is completed.


Main ▾

Please enter a new form for each life map goal

***Goal Start Date**
09/17/2025

***Goal Category**
Education

***Education Goals**
- ○ Enroll in education program
- ○ Consistent attendance in education program
- ○ Completion of education program
- ○ Receive passing semester grade
- ◉ Other

Other Value
This field is required.

Goal Notes (optional)
Additional info if needed

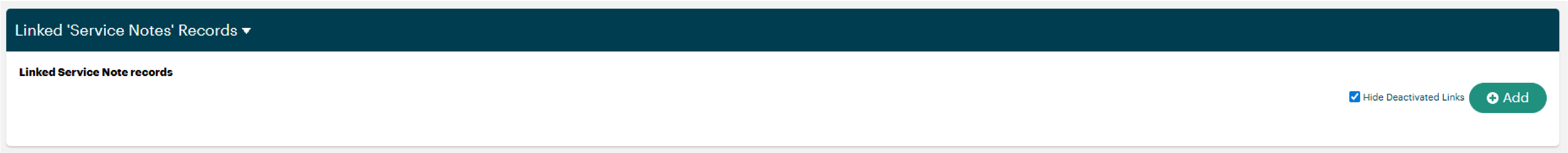
***Goal Status**
- ○ In Progress
- ○ Complete
- ○ Abandoned

This field is required.

Goal Progress Notes
Notes

Life Map Goals Form

Note that all service notes linked to a life map goal will appear under “Linked Service Notes Records.” Linkage must be done through the **Service Notes Form**.

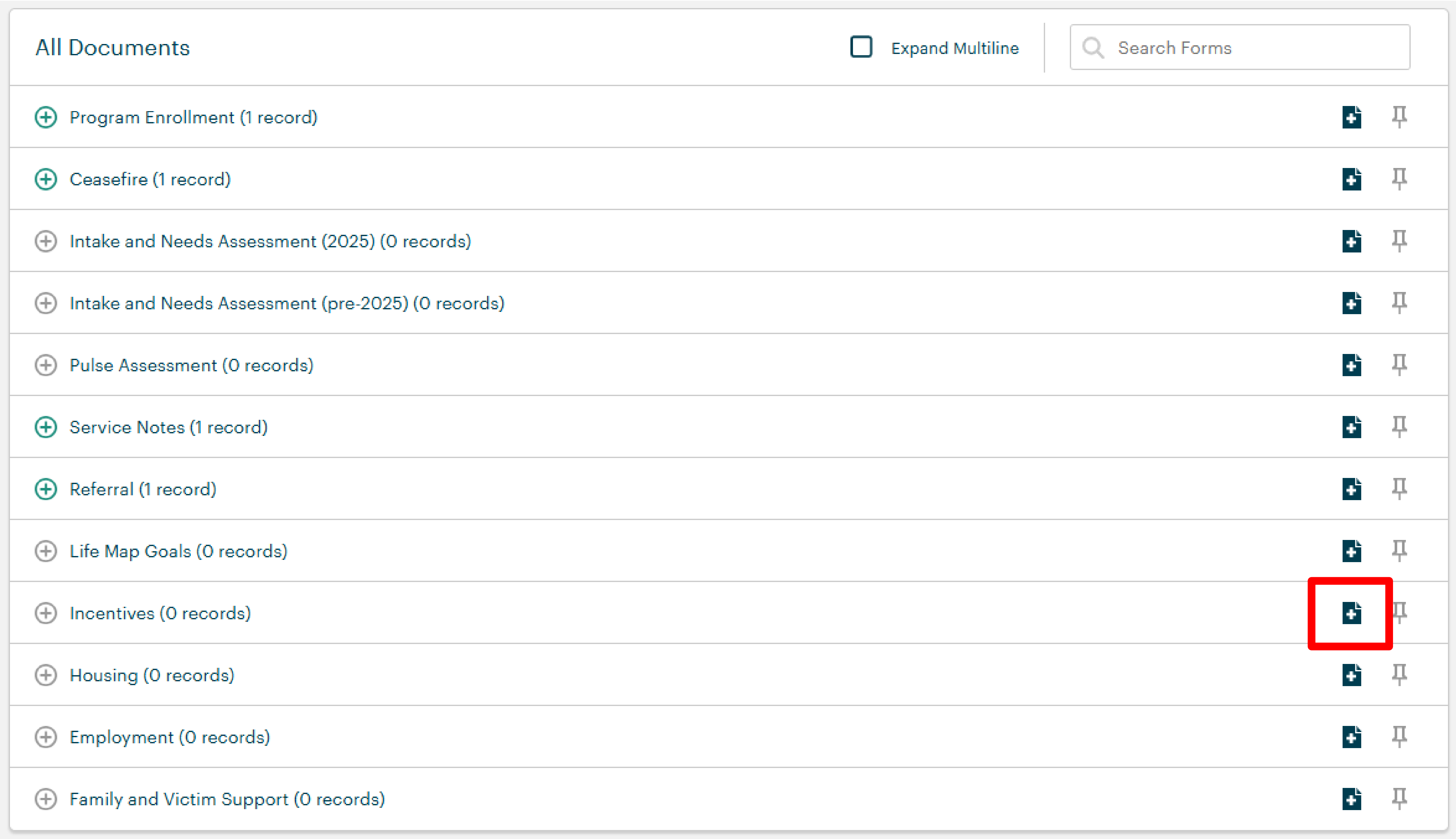


Incentive Form

Incentive Form

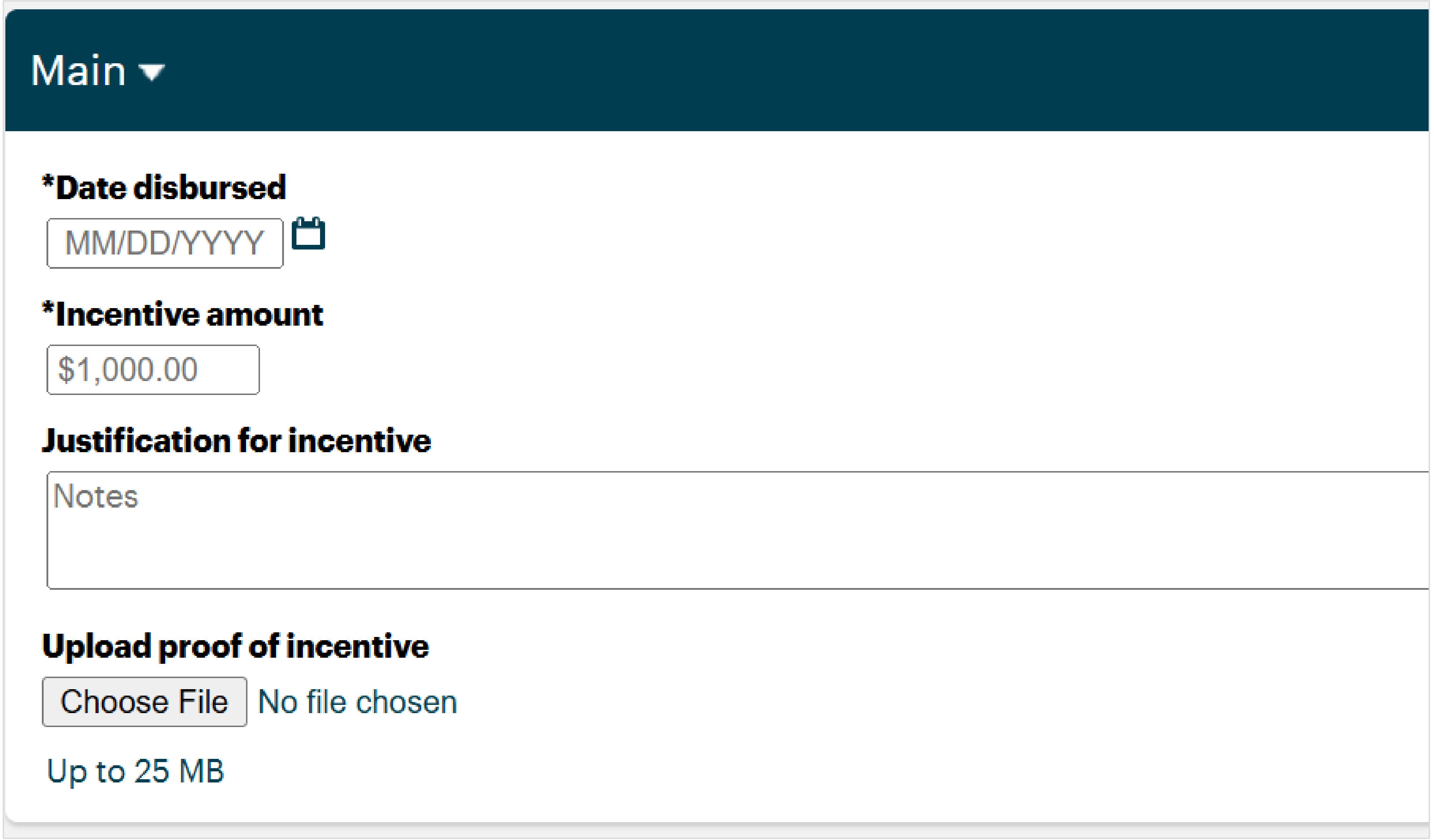
Step 1: Click the "+" button next to "Incentive" in the participant's folder to enter a monthly incentive payment.

Note: Flexible funds are recorded separately through a **Service Notes Form.**



Incentive Form

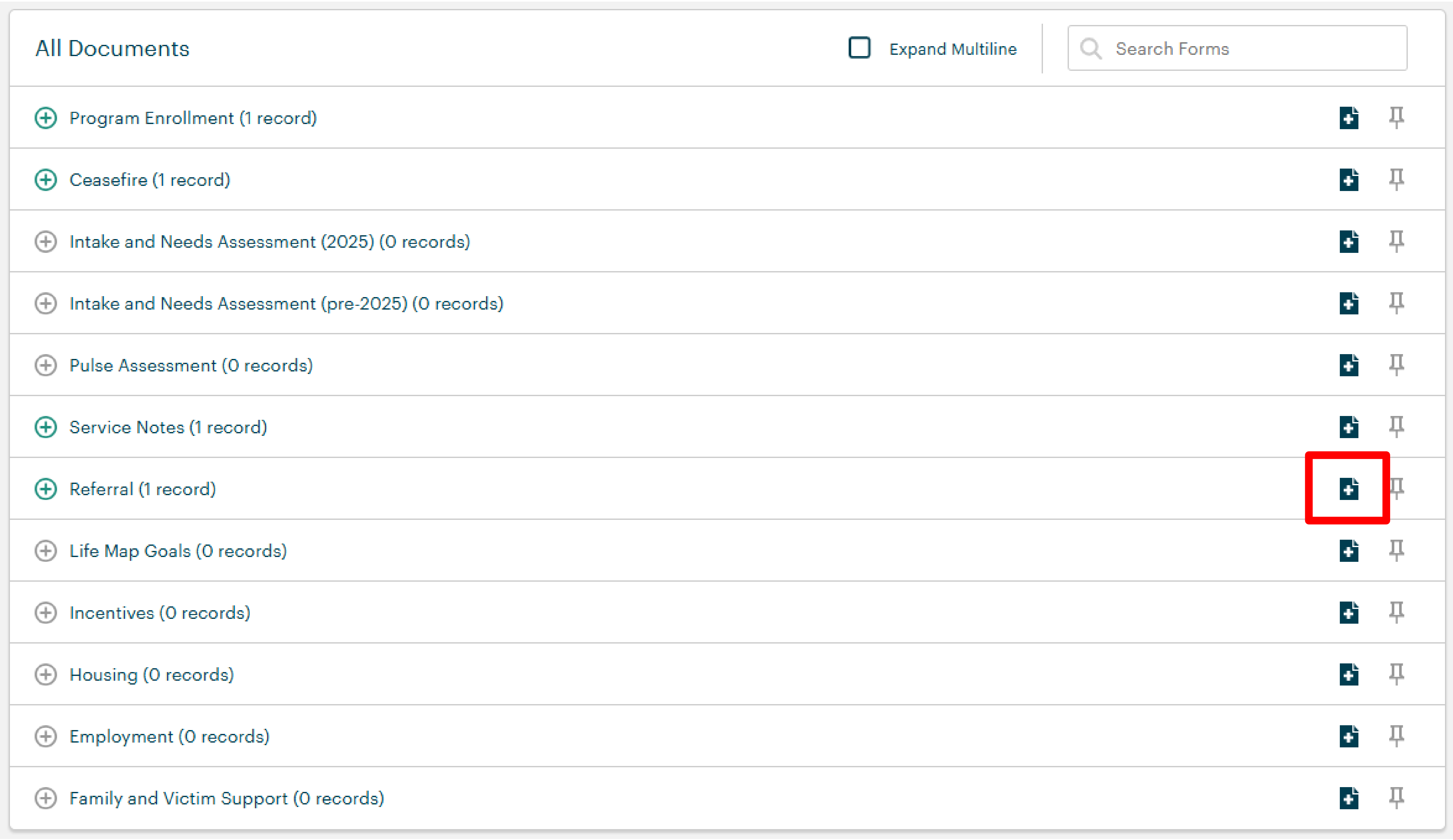
Step 2: Enter the date of disbursement, incentive amount, and a justification for the incentive. “Client is actively engaged in services” is a sufficient justification. Also, upload proof that the incentive was received by the participant.



Referral Form

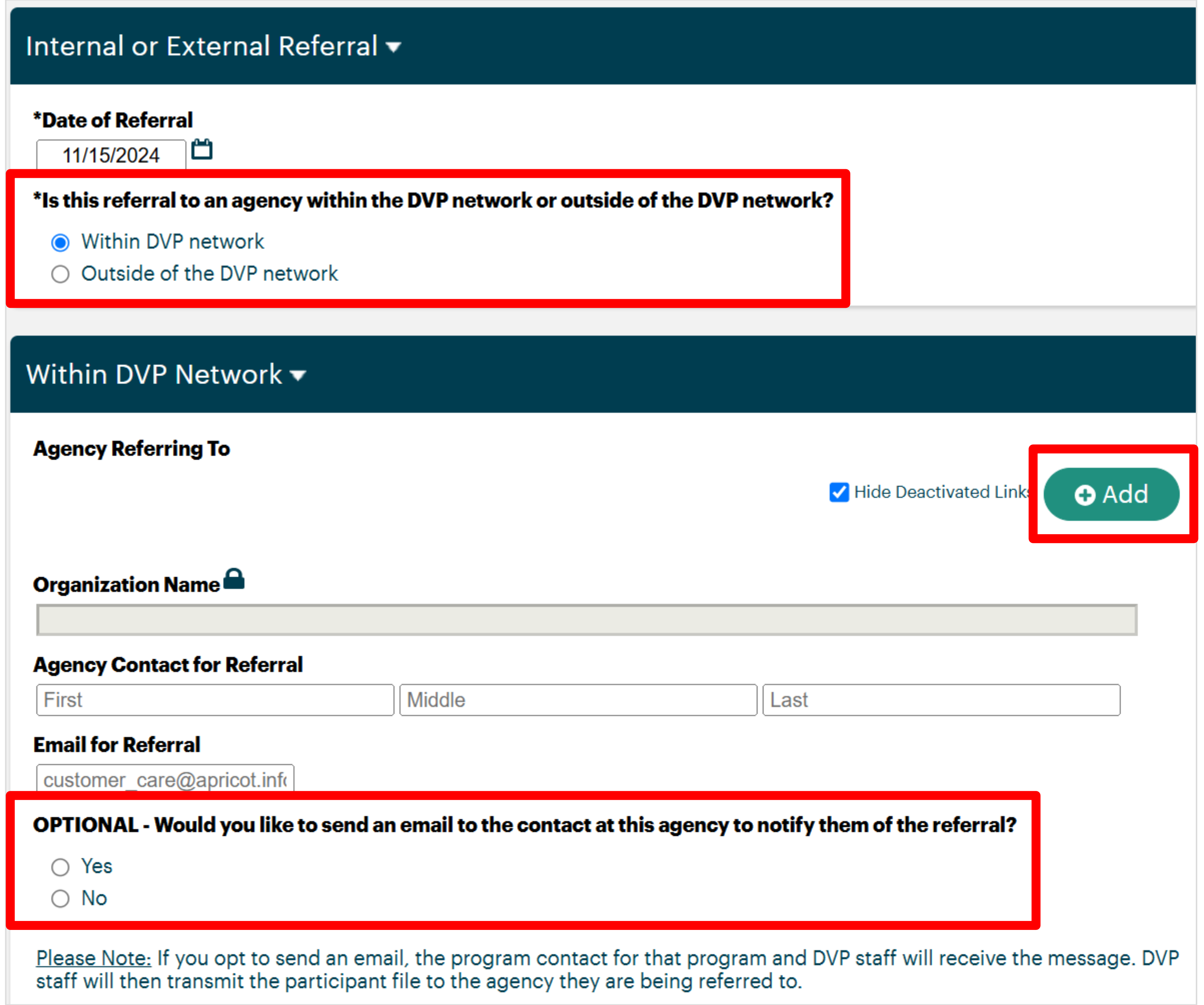
Referral Form

Step 1: Click the "+" button next to "Referral" in the participant's folder to document a referral to services.



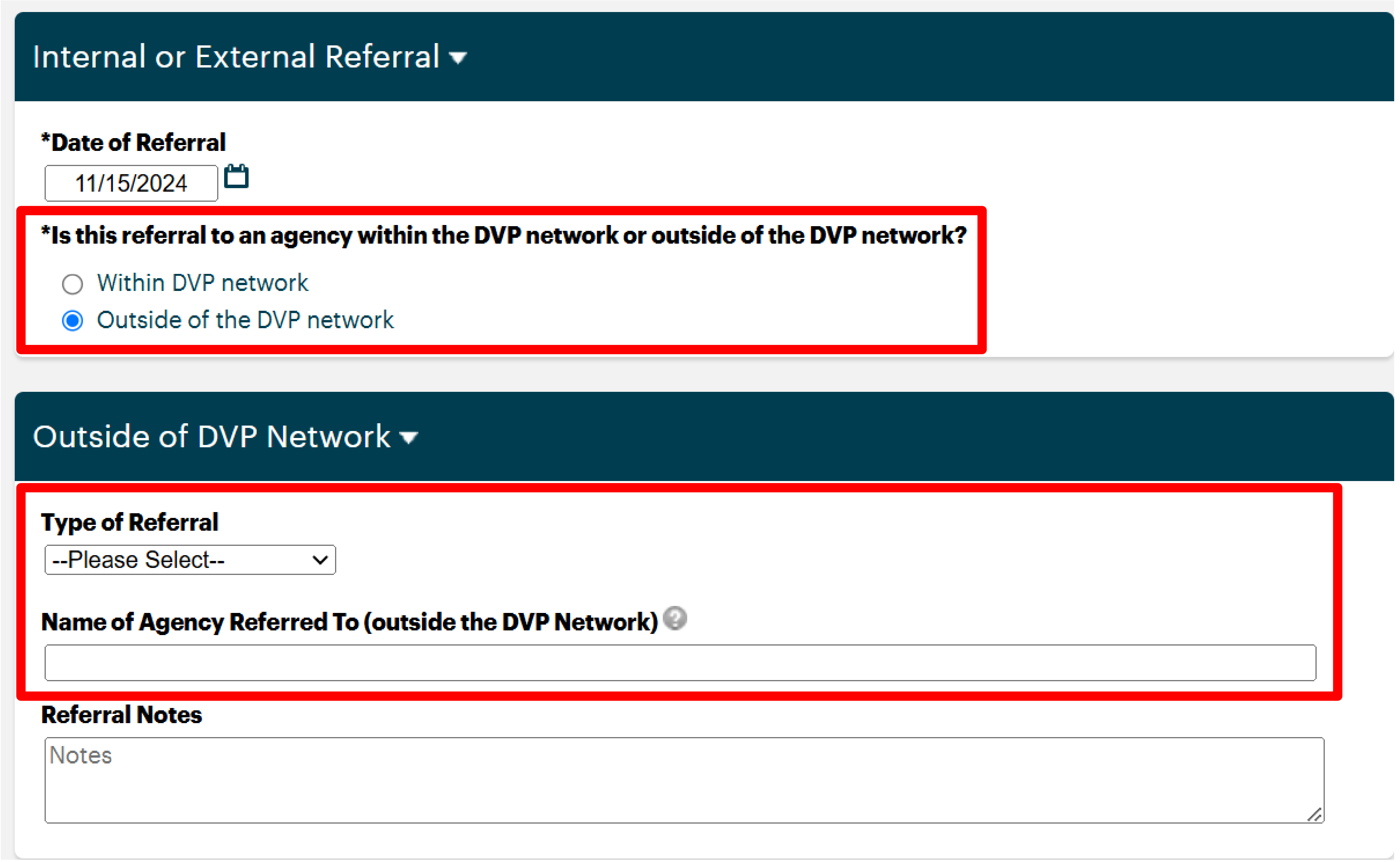
Within the DVP Network

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.



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.



Recommended Reports

Recommended Reports

Report with link	Information provided by report
Individual Life Coach Weekly Performance Management Report	This report provides the current caseload of each life coach and how they are performing on weekly contact metrics.
Individual Client Report	This report provides all details about a specific participant, including all of their service notes.
Service Notes and Hours Report	This report provides all service notes and hours within a specific date range.
Incentives Report	This report provides all incentive amounts disbursed by agency and by participant during a specific date range.