

Apricot Data Entry Instructions

Life Coaching & Youth Diversion

September 2025

Contact:

Cat Grey

cgrey@oaklandca.gov

Ulises Sanchez

usanchez@oaklandca.gov



Table of Contents

03	Deliverables
05	Participant Records
13	Program Enrollment Form
23	Consent Form
28	Service Notes Form
32	Life Map Goals Form
36	Incentive Form
39	Referral Form
43	Recommended Reports



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.



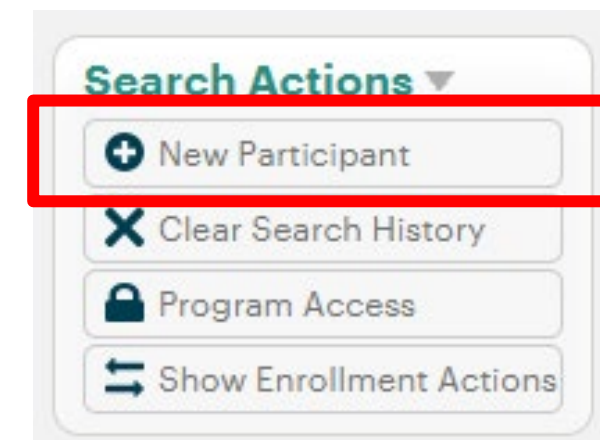
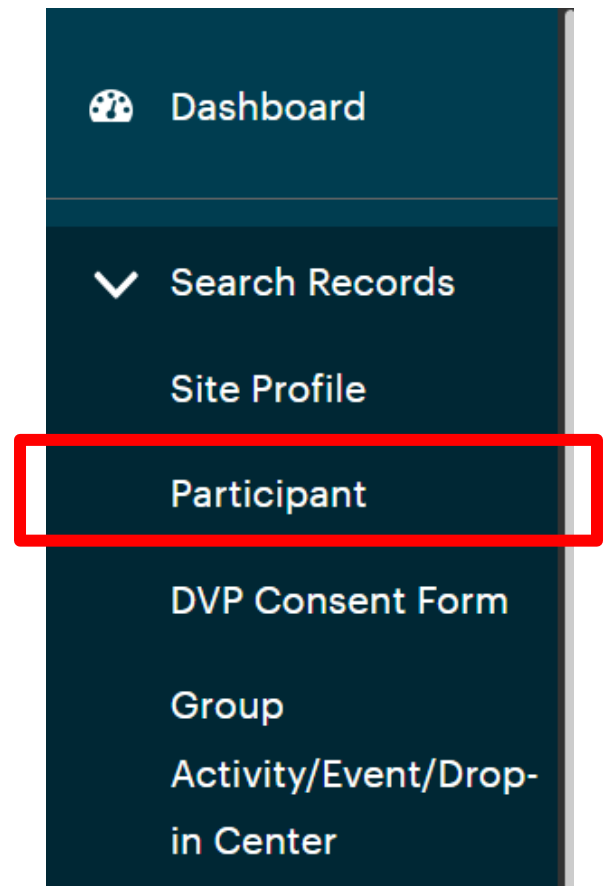
Participant Records



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.”

Participant Details ▾

***Name**

First Middle Last

Email

***Date of Birth**

MM/DD/YYYY

Primary Phone ext.

Secondary Phone ext.

Emergency Contact Name

Emergency Contact Phone ext.

Address Lookup Select to map X

Address

Line 1

Line 2

Record Options ▾

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.

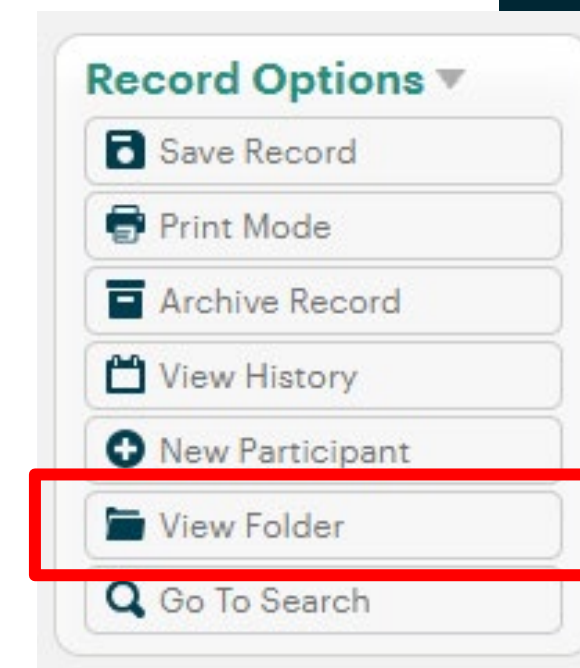
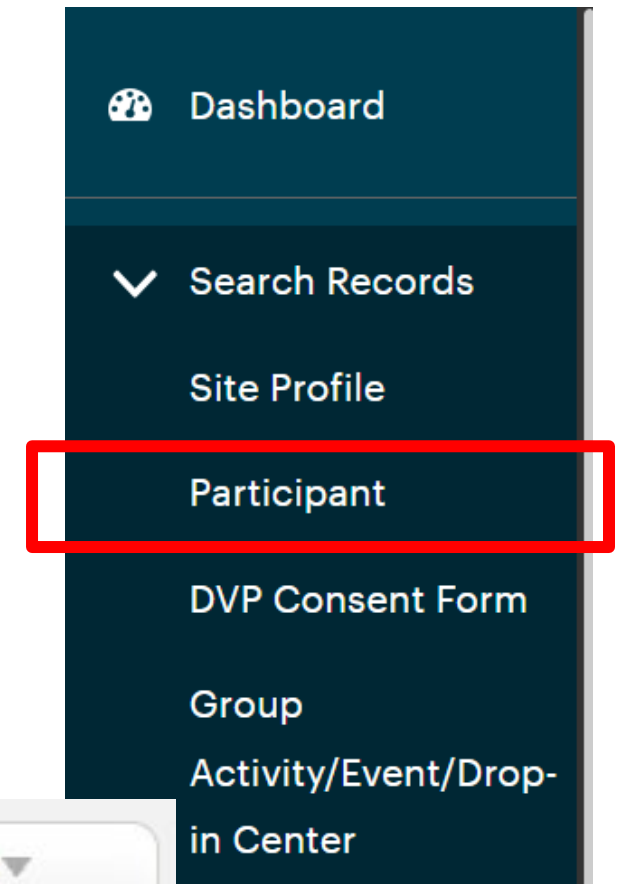
Complete [this form](#) to have the person added to your site.



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.

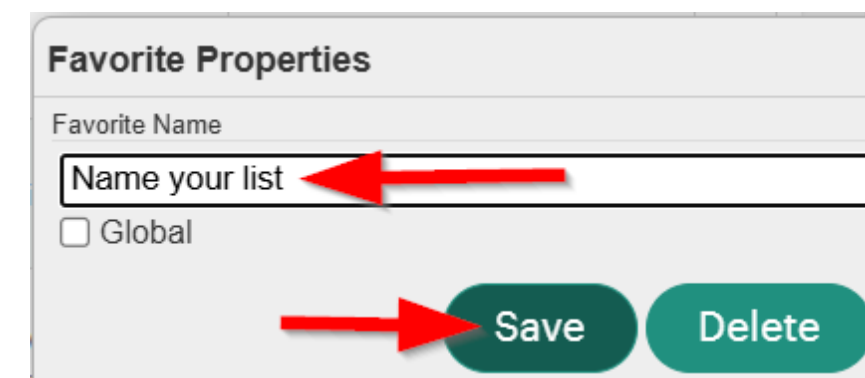
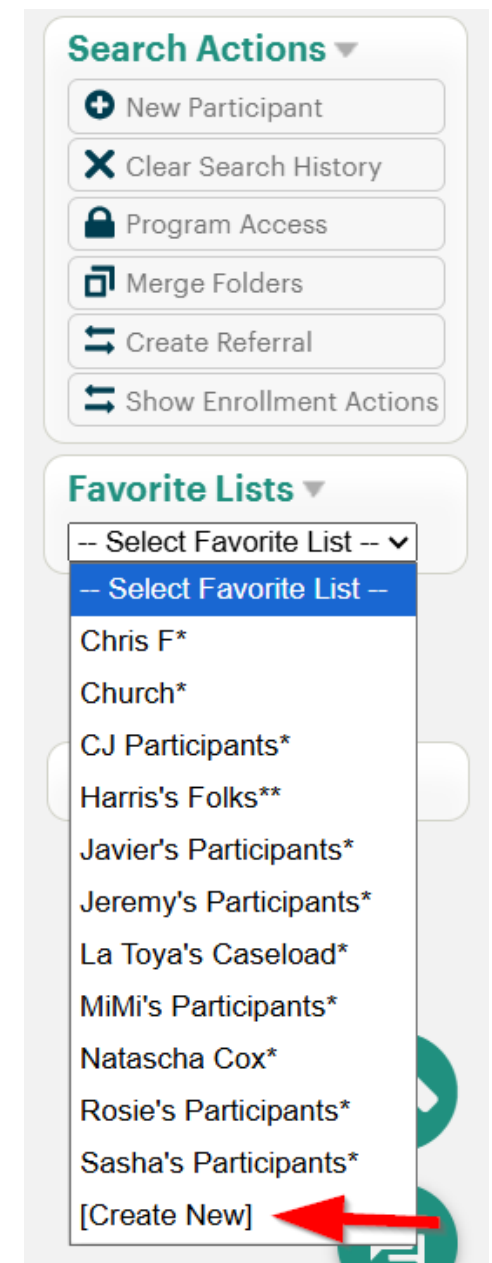
All Documents		<input type="checkbox"/> Expand Multiline	Search Forms
+ Program Enrollment (1 record)			
+ Ceasefire (1 record)			
+ Intake and Needs Assessment (2025) (0 records)			
+ Intake and Needs Assessment (pre-2025) (0 records)			
+ Pulse Assessment (0 records)			
+ Service Notes (1 record)	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

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.

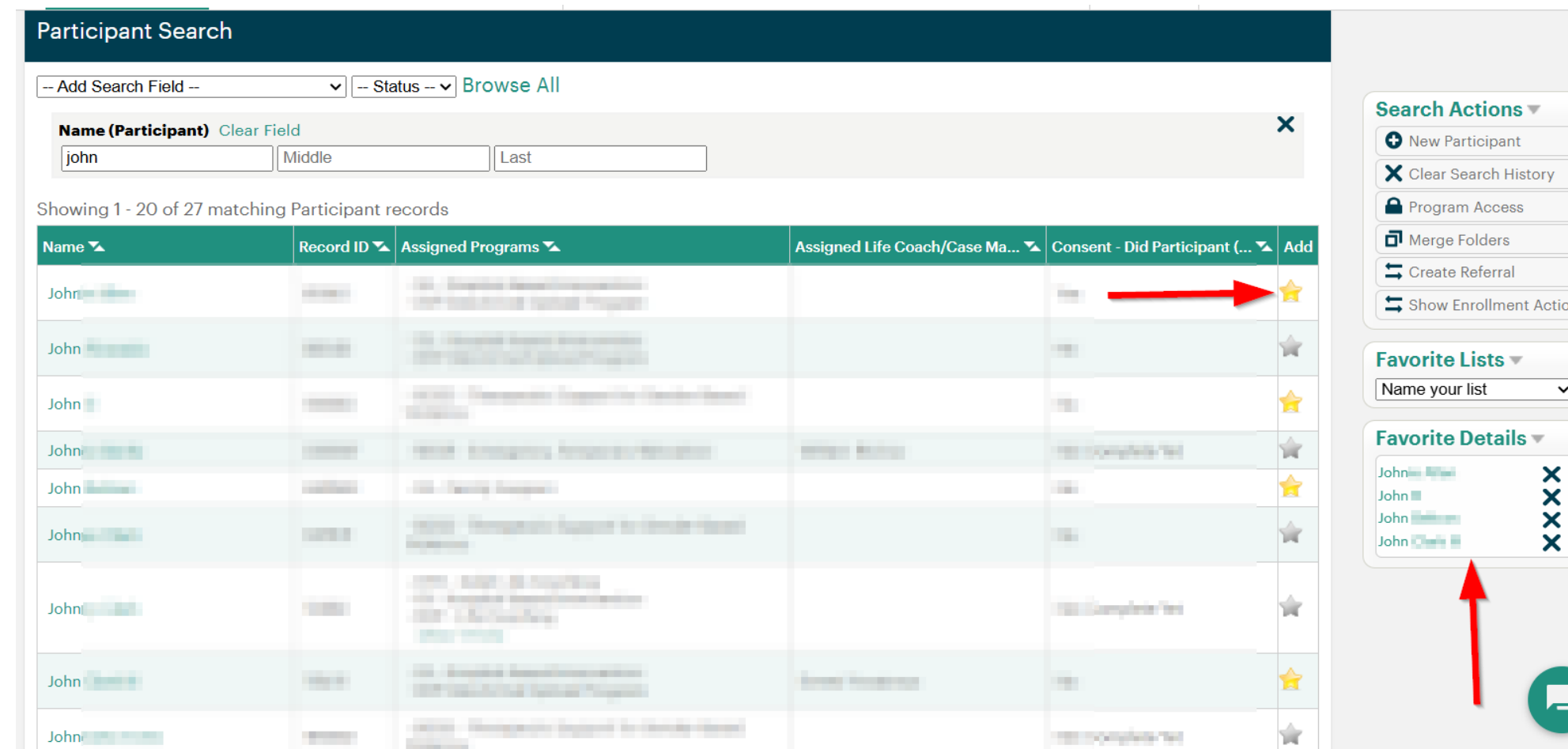
Step 1: Click on “Select Favorite List” on the right side of the screen and select “[Create New].”

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.



The screenshot shows the 'Participant Search' interface. At the top, there are search filters: '-- Add Search Field --', '-- Status --', and 'Browse All'. Below this is a search bar with the text 'john' and a 'Clear Field' button. The search results are displayed in a table with the following columns: Name, Record ID, Assigned Programs, Assigned Life Coach/Case Ma..., Consent - Did Participant (...), and Add. A red arrow points to the star icon in the 'Add' column of the first row. On the right sidebar, there are sections for 'Search Actions' (New Participant, Clear Search History, Program Access, Merge Folders, Create Referral, Show Enrollment Actions) and 'Favorite Lists' (Name your list). Below these is the 'Favorite Details' section, which lists the names of participants who have been favorited, each with a star icon and a close button (X). A red arrow points to the first entry in the 'Favorite Details' list.

Name	Record ID	Assigned Programs	Assigned Life Coach/Case Ma...	Consent - Did Participant (...)	Add
John	12345	...		...	★
John	12346	...		...	★
John	12347	...		...	★
John	12348	...	...	...	★
John	12349	...		...	★
John	12350	...		...	★
John	12351	...	...	...	★
John	12352	...		...	★
John	12353	...		...	★



Program Enrollment





Enrolling a Participant

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

The screenshot shows a web interface for document management. At the top, there is a header with "All Documents" on the left, a checkbox for "Expand Multiline" in the middle, and a search bar labeled "Search Forms" on the right. Below the header is a list of folders, each with a plus sign icon on the left and a pin icon on the right. The first folder, "Program Enrollment (1 record)", has its plus sign icon highlighted with a red square. The other folders are: "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)".

Folder Name	Records	Action
Program Enrollment	1 record	+ (highlighted)
Ceasefire	1 record	+ (pin)
Intake and Needs Assessment (2025)	0 records	+ (pin)
Intake and Needs Assessment (pre-2025)	0 records	+ (pin)
Pulse Assessment	0 records	+ (pin)
Service Notes	1 record	+ (pin)
Referral	1 record	+ (pin)
Life Map Goals	0 records	+ (pin)
Incentives	0 records	+ (pin)
Housing	0 records	+ (pin)
Employment	0 records	+ (pin)
Family and Victim Support	0 records	+ (pin)




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.

<p>*Is the individual connected to a street crew or group? (adult)</p> <p><input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Don't Know</p>	<p>*Has the individual ever been intentionally shot, stabbed, or shot at? (adult)</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Don't Know</p>
<p>*Does the individual have a history with the criminal or juvenile justice system? (adult)</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Don't Know</p>	<p>*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)</p> <p><input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Don't Know</p>

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 <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.



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		<input checked="" type="checkbox"/>		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.

A screenshot of a web form titled "Client Temporarily Unavailable". The form has a dark teal header. Below the header, there is a question: "Is this client temporarily unavailable for services?". A dropdown menu is open, showing "Yes - temporarily unavailable" selected. Below the question, there is a note: "Click '+ new' button to add unavailability details". In the bottom right corner, there is a checkbox labeled "Hide Deactivated Link" and a green button with a plus sign and the word "New". Both the dropdown menu and the "New" button are highlighted with red boxes.



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 Unavailability

COLLAPSE ALL

Record Options ▾

Save Linked Record

Cancel

Record Save Checklist ▾

Required Field Checks ✓

Field Validation Checks ✓

Form Logic Rules ▾

Other reason

Main ▾

***Reason**

In custody

Out of town

Other reason

Please remember to return to update with the end date and mark them as active when they are available again.

***Start date of unavailability**

09/18/2024 📅

End date of unavailability

MM/DD/YYYY 📅



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.

Client Temporarily Unavailable ▾

Is this client temporarily unavailable for services?
Yes - in custody ▾

Dates unavailable

Temporary Unavailability	
Reason ▾	Start date of unavailability ▾
In custody	08/26/2024

Total Active Links:1, Total Dec

Click here



Temporary Unavailability

Main ▾

*Reason

- In custody
- Out of town
- Other reason

Please remember to return to update with the end date and mark them as active when they are available again.

*Start date of unavailability
09/18/2024 📅

End date of unavailability
MM/DD/YYYY 📅



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.

Client Temporarily Unavailable ▾

Is this client temporarily unavailable for services?

No - they are active ▾



Consent Form



Types of consent forms

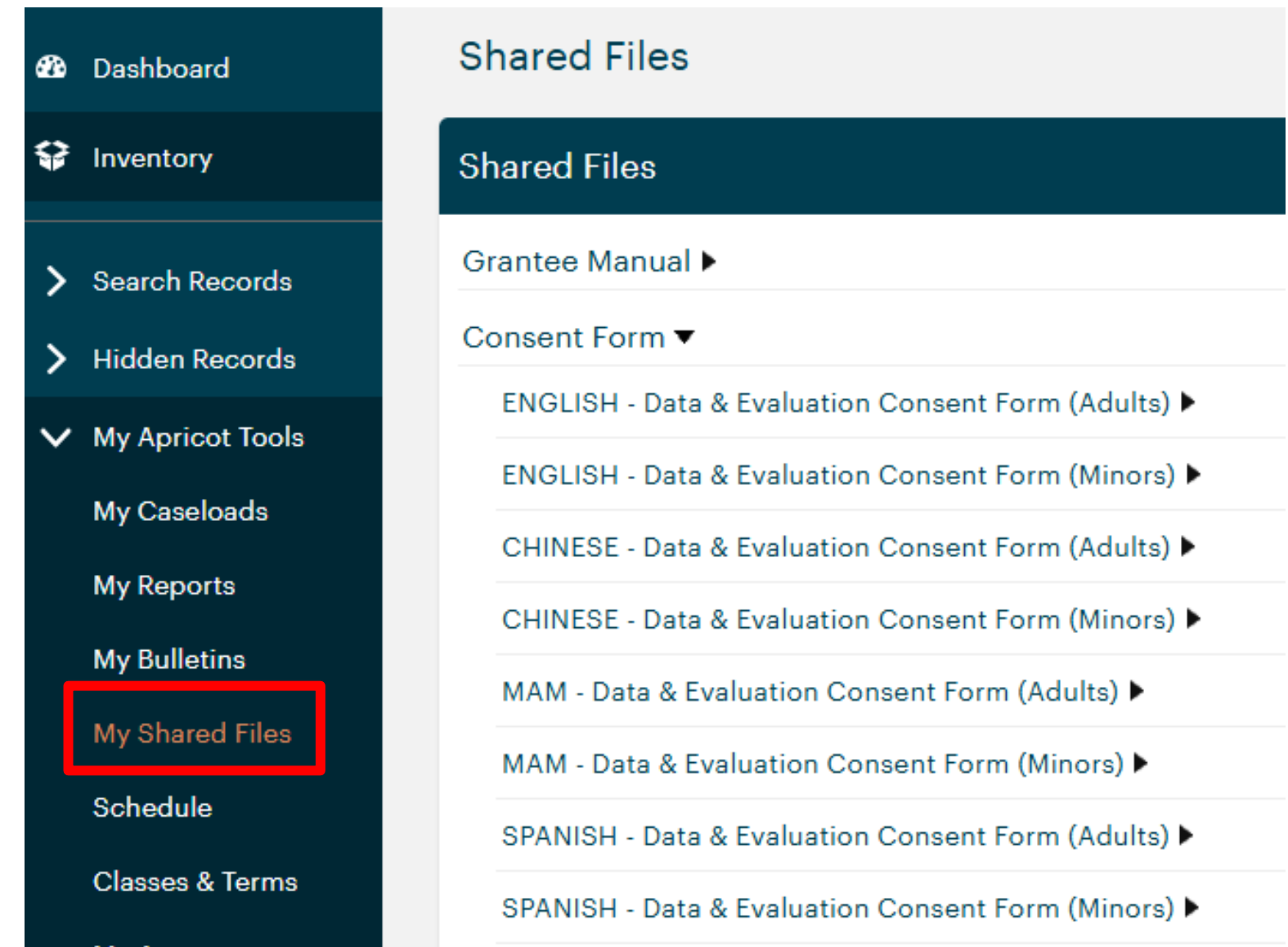
Once a participant enrolls in ongoing services, present the consent form to them within 30 days. There are three versions of the consent form based on the participant's age and the type of service they are receiving:

- 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 text 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".



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.”

Link life map goals to this Service Note

Hide Deactivated Links [+ Add](#)



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.

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)		



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**.

A screenshot of a software interface. At the top, there is a dark teal header bar with the text "Linked 'Service Notes' Records" and a small downward-pointing triangle. Below this, the main content area has a white background with the text "Linked Service Note records" in a bold, dark font. In the bottom right corner of this area, there is a checkbox labeled "Hide Deactivated Links" which is checked, and a green rounded rectangular button with a white plus sign and the word "Add" in white text.



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**.

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)		



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.

Main ▾

***Date disbursed**

***Incentive amount**

Justification for incentive

Upload proof of incentive
 No file chosen
Up to 25 MB



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
<u>Individual Life Coach Weekly Performance Management Report</u>	This report provides the current caseload of each life coach and how they are performing on weekly contact metrics.
<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>Incentives Report</u>	This report provides all incentive amounts disbursed by agency and by participant during a specific date range.