

Apricot Data Entry Instructions

Employment

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Deliverables



Deliverables

All

- Number of individuals served.

Adult

- Percentage of individuals who are successfully connected to employment or an employment training program.
- Number of employment readiness sessions held.

Youth

- Percentage of individuals who are successfully placed in work experience opportunities.
- Number of individuals who complete 100 hours of work experience.



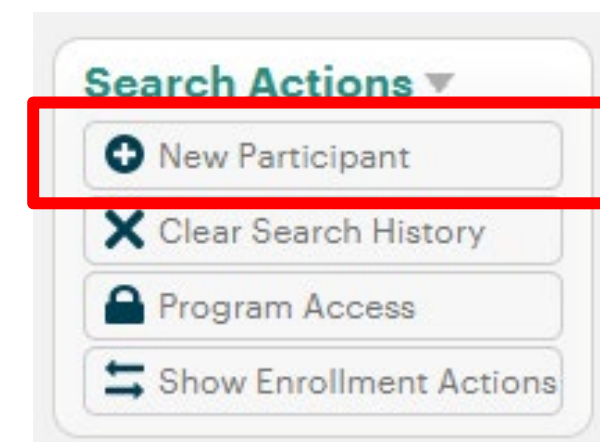
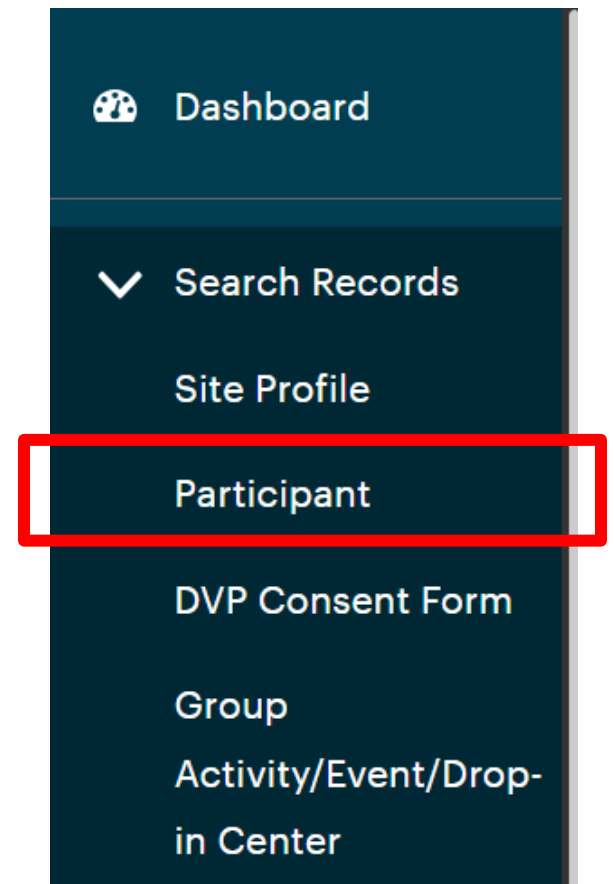
Participant Records



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  
Address No results found
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

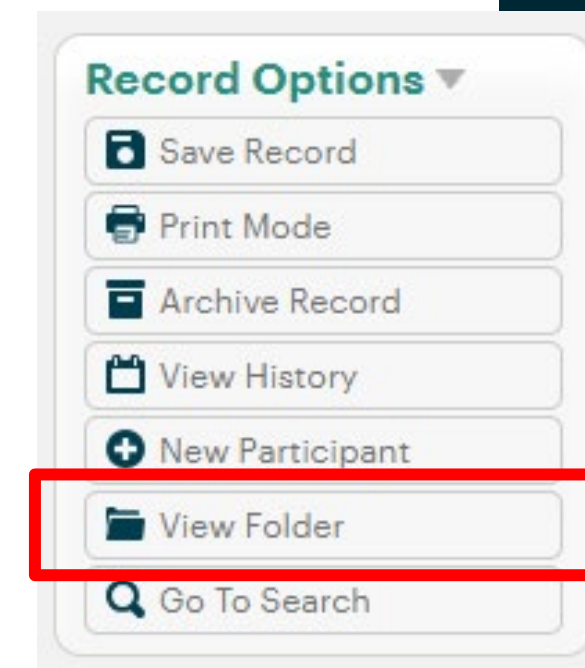
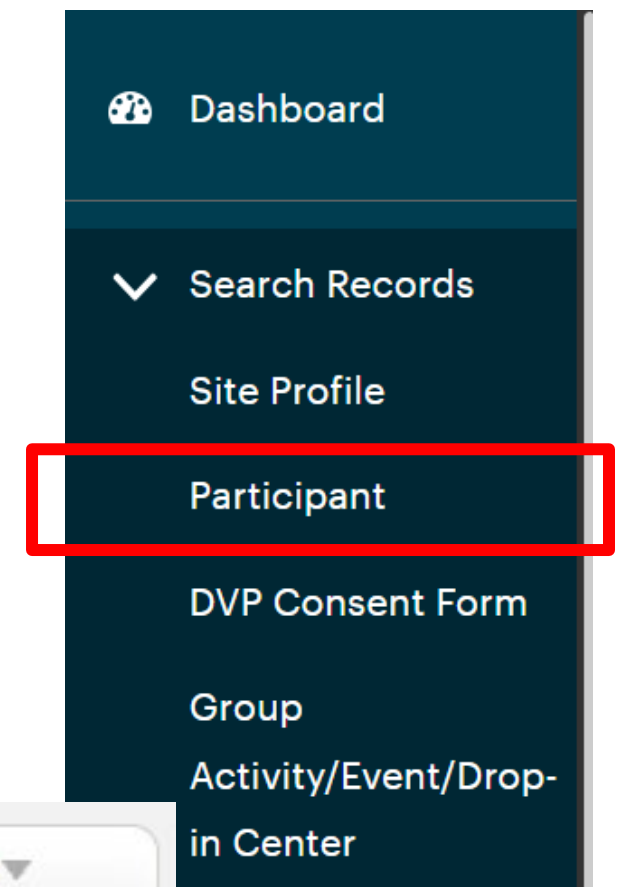
If a person is already in Apricot because they received services from a different agency, a duplicate record message will appear.

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

Accessing a Participant's Folder

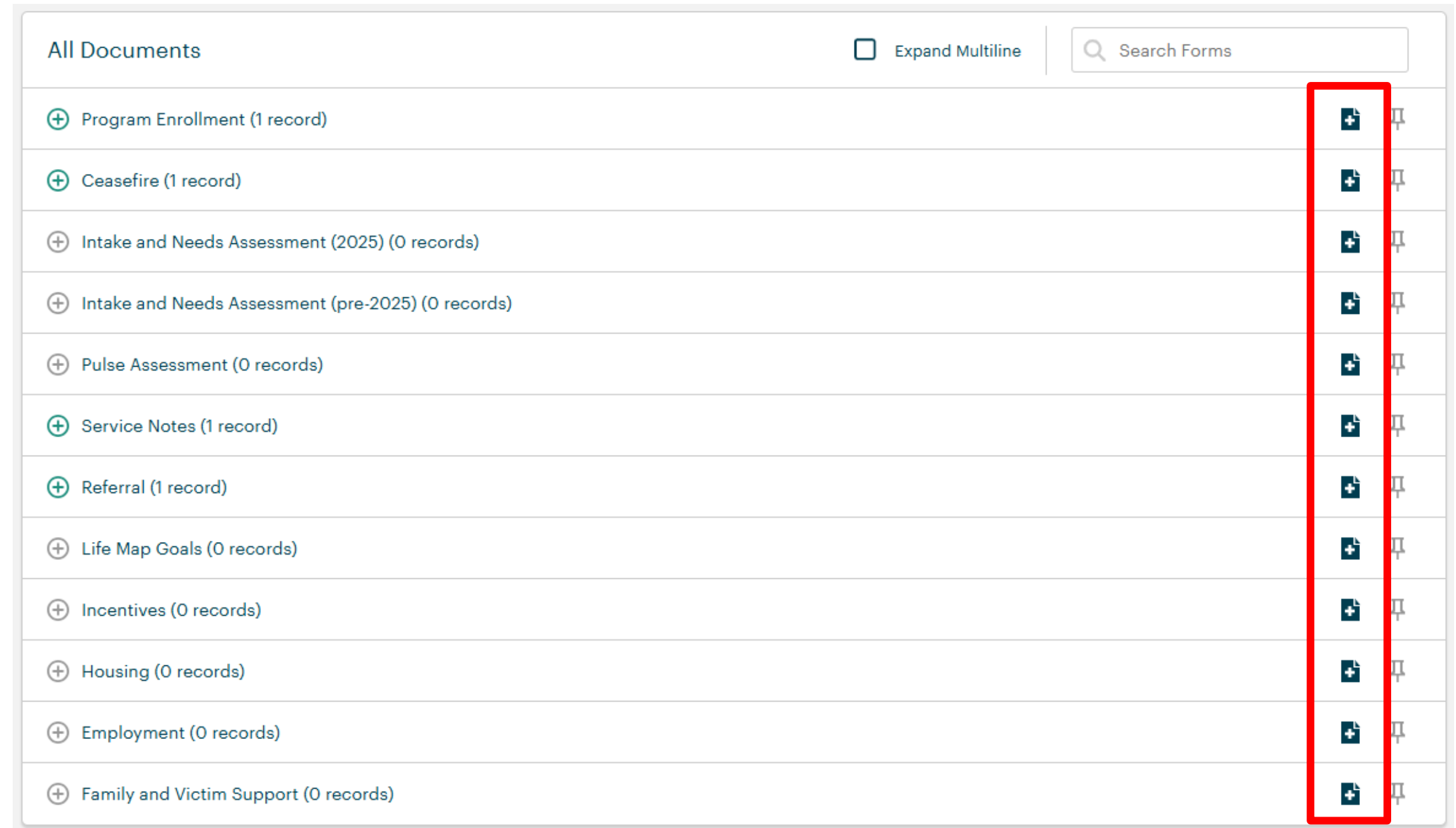
Step 1: Select “Participant” on the left side of the screen under “Search Records.”

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 for a participant's folder. The interface has a header with "All Documents" on the left, a checkbox for "Expand Multiline" in the center, and a search bar labeled "Search Forms" on the right. Below the header is a list of document categories, each with a plus icon in a circle and a record count. A red rectangular box highlights the right side of the list, specifically the plus icons and the pin icons. The list items are: "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)".

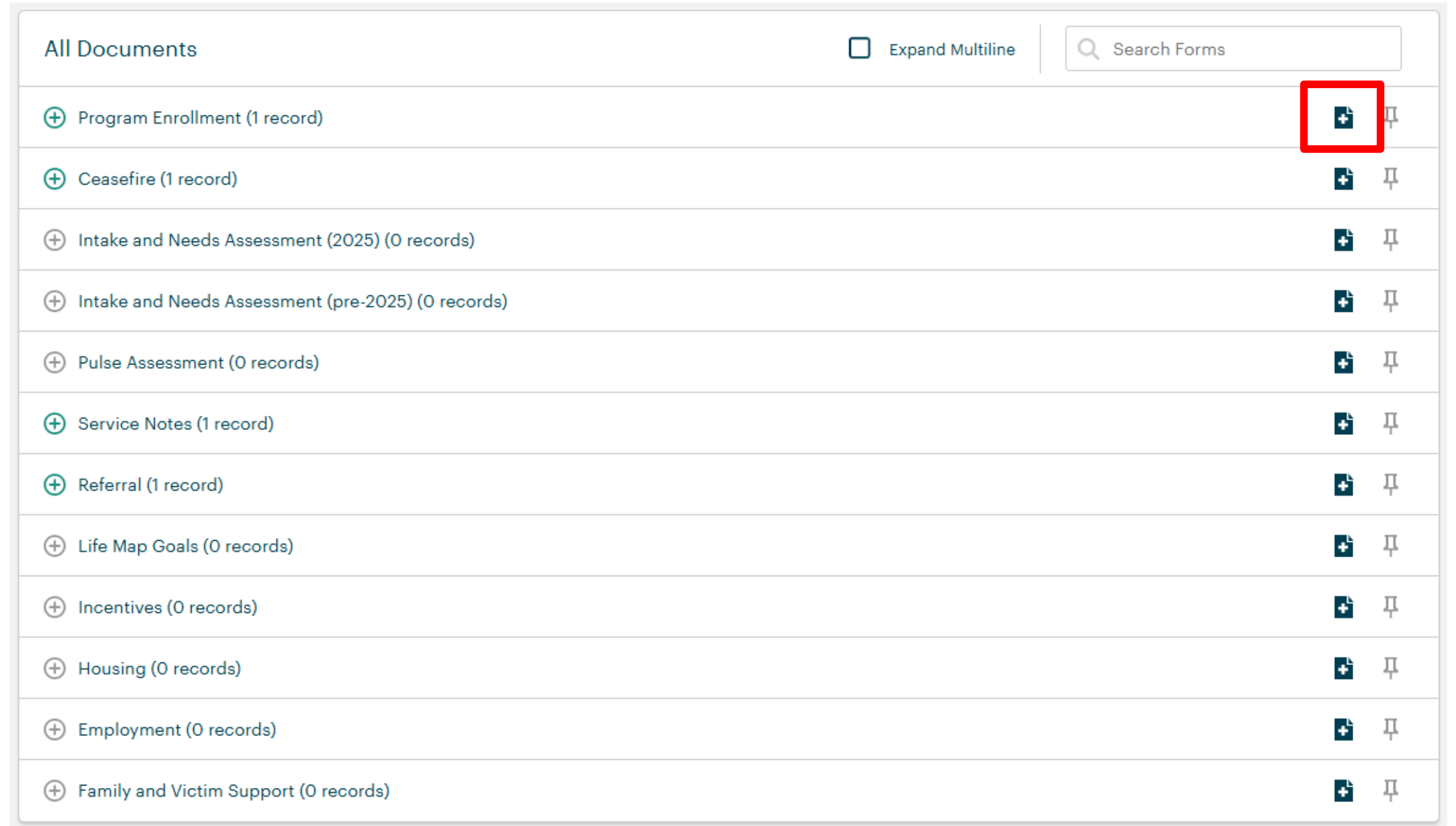
Document Type	Record Count
Program Enrollment	1 record
Ceasefire	1 record
Intake and Needs Assessment (2025)	0 records
Intake and Needs Assessment (pre-2025)	0 records
Pulse Assessment	0 records
Service Notes	1 record
Referral	1 record
Life Map Goals	0 records
Incentives	0 records
Housing	0 records
Employment	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.



The screenshot shows a web interface for managing documents. At the top, there is a header bar with 'All Documents' on the left, a checkbox for 'Expand Multiline' in the center, and a search bar labeled 'Search Forms' on the right. Below the header is a table listing various documents. The first row, 'Program Enrollment (1 record)', is highlighted with a red box around its '+' icon. The other rows 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)'. Each row has a '+' icon on the left and a pin icon on the right.

Document Name	Records	Action
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 ▾

Exit Date

07/09/2024

← Enter date of last contact.

*Primary Reason for Exit

--Please Select-- ▾

← Select the appropriate exit reason.

This field is required.

Length of Enrollment in Days

0

← This field will auto calculate.

Exit Notes

Notes



Consent Form

Types of consent forms

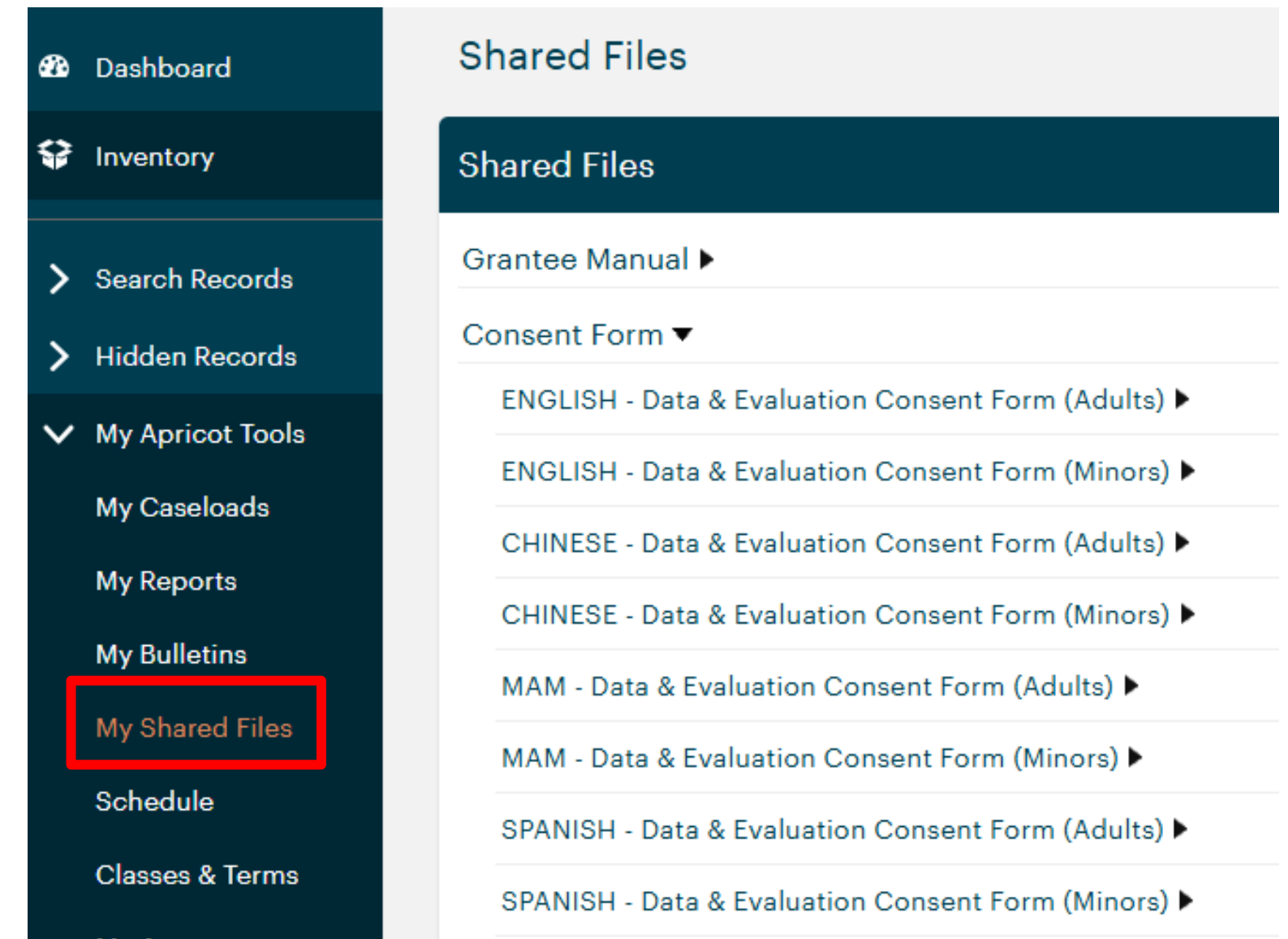
Once a participant enrolls in ongoing services, present the consent form to them within 30 days. There are three versions of the consent form based on the participant's age and the type of service they are receiving:

- 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.

A screenshot of a web application interface titled "All Documents". At the top right, there is a checkbox labeled "Expand Multiline" and a search bar labeled "Search Forms". Below the header is a list of document types, each with a green circular "+" button on the left and a blue document icon with a "+" on the right. The list items are: "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 blue document icon with a "+" for the "Service Notes (1 record)" entry.



Main ▾

*Date of Service

08/22/2025

*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 Provided

--Please Select--

This field is required.

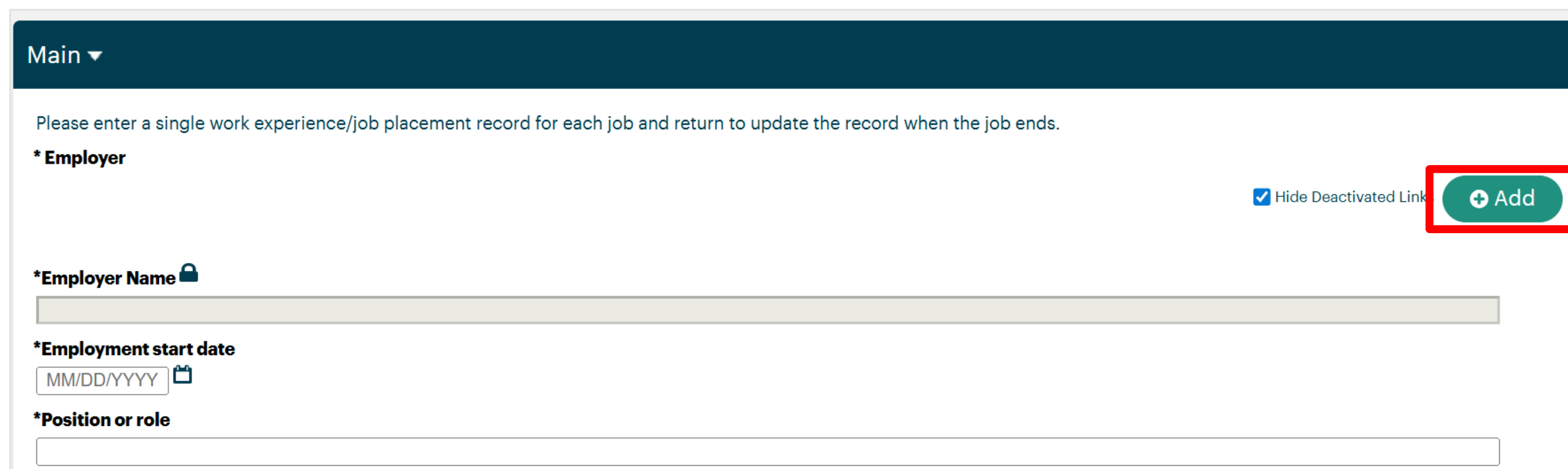


Employment Form

Placement Start

Complete an **Employment Form** when a participant starts a job, a training program, or work experience as part of their services.

You will need to link the related employer on this form. If the employer is not already entered in Apricot, you will need to create an **Employer Profile Form** using instructions in this guide.

The screenshot shows a web interface with a dark teal header bar containing the word "Main" and a downward arrow. Below the header, a light blue instruction line reads: "Please enter a single work experience/job placement record for each job and return to update the record when the job ends." The form contains several fields: a label "* Employer" followed by a checkbox labeled "Hide Deactivated Link" and a green "Add" button with a plus icon (highlighted by a red rectangle); a label "*Employer Name" with a lock icon and a text input field; a label "*Employment start date" with a date input field showing "MM/DD/YYYY" and a calendar icon; and a label "*Position or role" with a text input field.

Placement End

Return to the **Employment Form** to enter an end date and reason when a participant ends their job, training program, or work experience for whatever reason.

Employment End ▼

Job End Date

09/15/2025 

*Primary reason for end of placement

Got a new job ▼

*Current employment status

Employed full-time ▼

Hours per week at end

00

Notes

Notes

← If “Got a new job” or “Employment program ended” is selected, the field below called “Current Employment Status” will appear and require a response.



Employer Profile Form



Entering an Employer Profile

Step 1: Select “Employer Profile” on the lefthand side of the screen.

Step 2: Add a new record and enter details.

Employer Profile

Main ▾

***Employer Name** 

***Industry**

--Please Select-- ▾

Job Placement Contact

First Middle Last

Job Placement Contact Email

Employer Address Clear Select to map 

Address

Line 1

Line 2

City

No results found

 MENU **apricot** 360 MY APRICOT ADMINISTRATOR

Dashboard

Inventory

Search Records

Site Profile

Participant

Crisis Navigation

DVP Consent Form

Emergency

Relocation Referral Form

Employer Profile

Group Activity

Apricot Bulletins

Quick Links ▾

Welcome to Apricot! ▾

Welcome to Apricot, DVP Grantees!

Hello everyone and welcome to the Apricot 360 s

Duplicate Participants

If you attempt to add a participant to Apricot and <https://a115039.socialsolutionsportal.com/apricot>

Quarterly Reports

Quarterly Reports and invoices are due on the dat

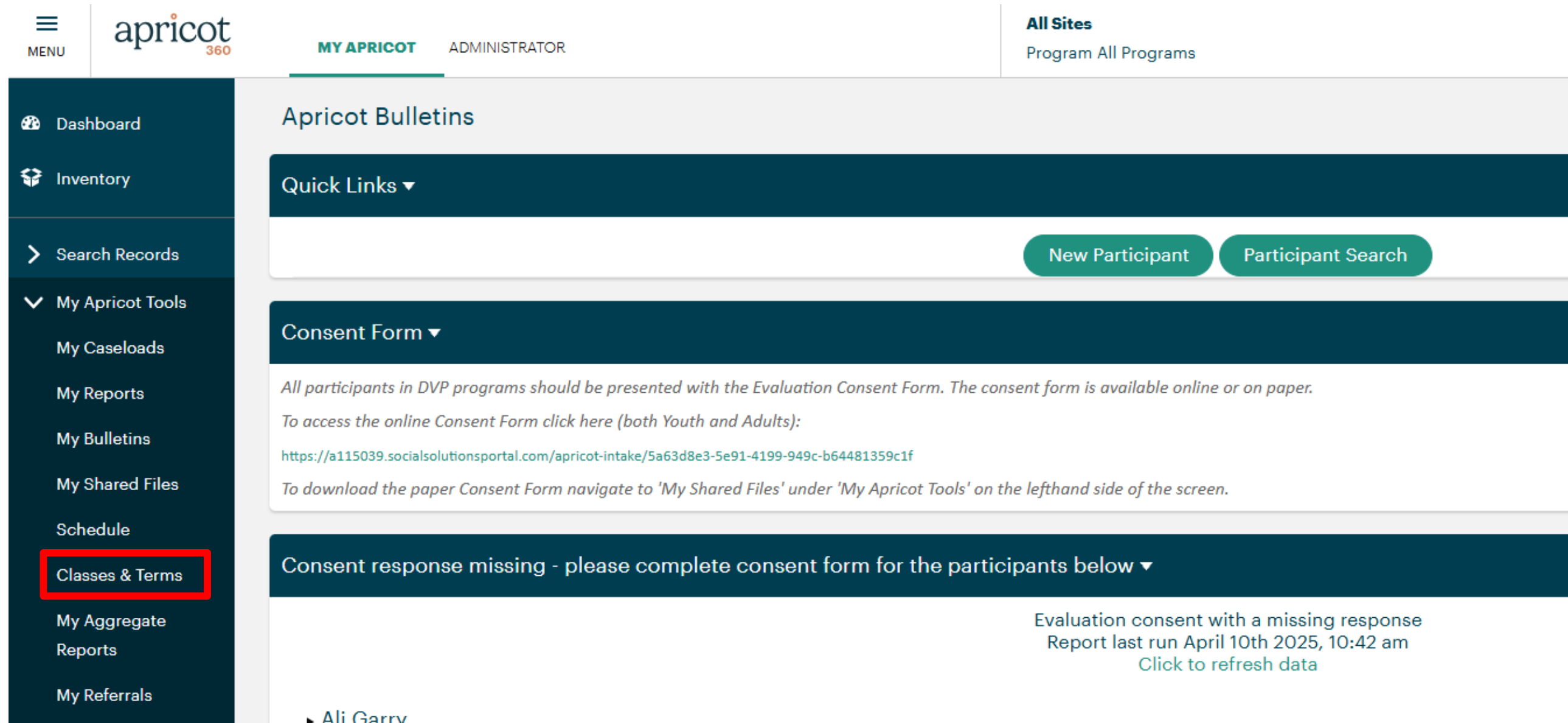
*Please note that reports due after Quarter 3 and



Classes & Terms (OPIC only)

Creating a New Class Cohort

Step 1: Select “Class & Terms” on the lefthand side of the screen.



The screenshot displays the Apricot 360 Administrator interface. On the left sidebar, the 'Classes & Terms' menu item is highlighted with a red rectangle. The main content area shows the 'Apricot Bulletins' section with a 'Quick Links' dropdown, 'New Participant' and 'Participant Search' buttons, a 'Consent Form' section with instructions and a link, and a 'Consent response missing' notification. The user's name 'Ali Garrv' is visible at the bottom left.

MENU | apricot 360 | MY APRICOT | ADMINISTRATOR | All Sites | Program All Programs

Dashboard
Inventory
> Search Records
✓ My Apricot Tools
My Caseloads
My Reports
My Bulletins
My Shared Files
Schedule
Classes & Terms
My Aggregate Reports
My Referrals

Apricot Bulletins

Quick Links ▼

New Participant Participant Search

Consent Form ▼

All participants in DVP programs should be presented with the Evaluation Consent Form. The consent form is available online or on paper.
To access the online Consent Form click here (both Youth and Adults):
<https://a115039.socialsolutionsportal.com/apricot-intake/5a63d8e3-5e91-4199-949c-b64481359c1f>
To download the paper Consent Form navigate to 'My Shared Files' under 'My Apricot Tools' on the lefthand side of the screen.

Consent response missing - please complete consent form for the participants below ▼

Evaluation consent with a missing response
Report last run April 10th 2025, 10:42 am
[Click to refresh data](#)

Ali Garrv

Creating a New Class Cohort

Step 2: Select “New Class +” to create a new type of class.

Step 3: Once the class is created, create a new cohort by clicking the eye button.

All Classes ☐ Show Inactive

New Class +

NAME	STATUS	TERMS TOTAL	TERMS IN PROGRESS	
Pre-Employment Readiness	Active	0 terms	0 terms	👁 ⋮

VIEW

10

▼

<

PAGE

1

▼

of 1

>

Creating a New Class Cohort

Step 4: Enter the name of the cohort, the program, how often it occurs, what days and times it occurs, and when it starts and ends.

Note: If there are specific dates that the class is not happening (e.g. holidays), click on “specific dates” to mark them.

New Term



Term Details * Required

NAME*

Pre - Employment Readiness - Cohort 1

37 / 150

PROGRAM(S)*

OPIC - Adult Employment and Education Support x | v

LOCATION

0 / 75

Term Dates

RECURRING **SPECIFIC DATE(S)**

OCCURS **EVERY** **ON**

Weekly | v 1 week(s) S M T **W** T F S

START DATE **END DATE** **START TIME** **END TIME**

10/06/2025 - 12/31/2025 5:00 pm - 7:00 pm

Creating a New Class Cohort

Step 5: Uncheck “Use Term Completion Criteria” and “Enable Risk Indicator.” Those features will not be used.

Step 6: To finish, click the “Save Term” button at the bottom.

Term Completion Criteria

☐ Use Term Completion Criteria

☒ Percentage

☐ Specific Number

Participants must be marked "present" % of days in order to complete term.

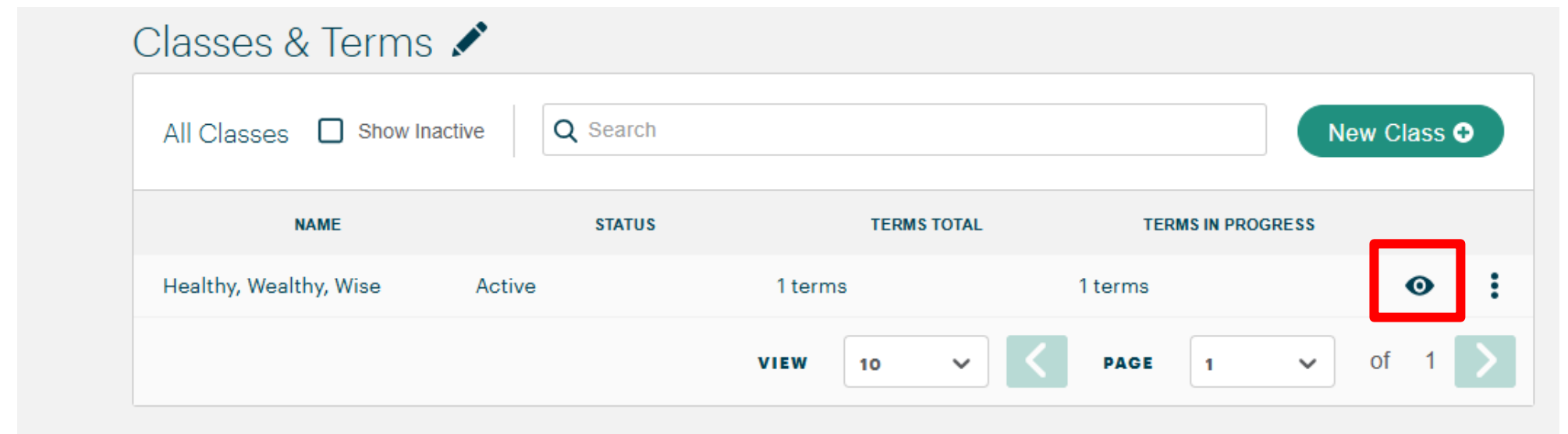
☒ Enable Risk Indicator

Based on Term End Date and Completion Criteria we can track and report on whether a participant is at risk of completing this term.

CancelSave Term

Enrolling Participants

Step 1: To enroll participants in a class, click the eye button next to the cohort name.



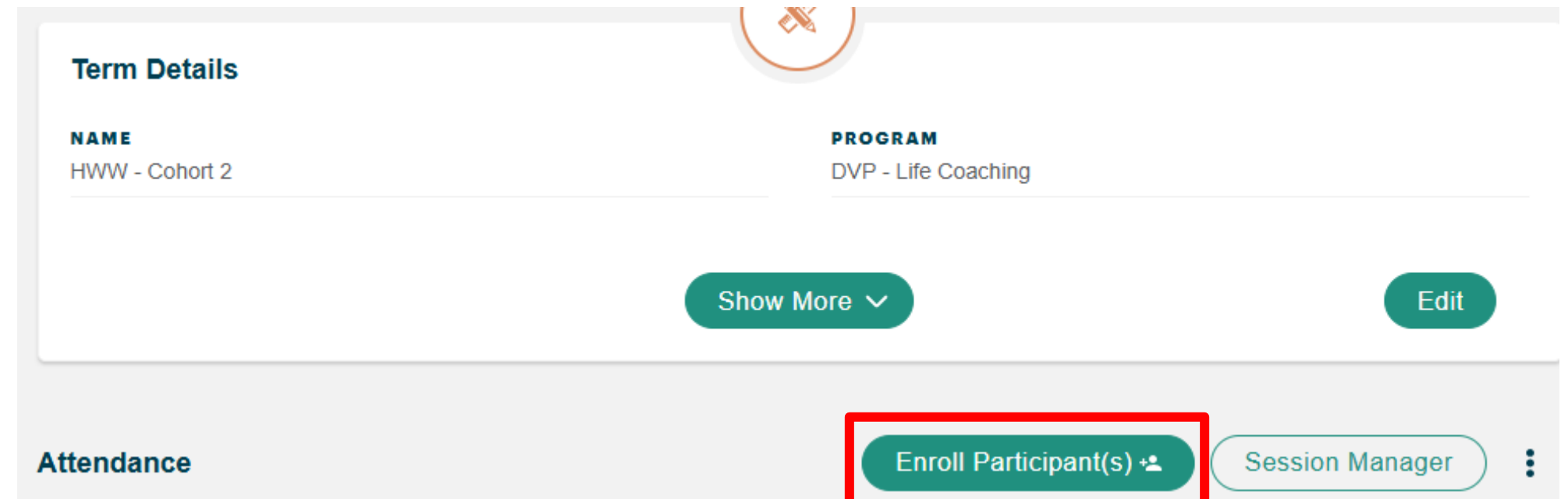
Classes & Terms 

All Classes ☐ Show Inactive New Class +

NAME	STATUS	TERMS TOTAL	TERMS IN PROGRESS	
Healthy, Wealthy, Wise	Active	1 terms	1 terms	 

VIEW 10   PAGE 1  of 1 

Step 2: Click the “Enroll Participants” button.

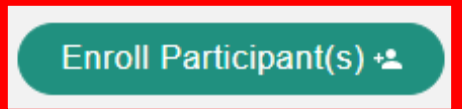


Term Details 

NAME
HWW - Cohort 2

PROGRAM
DVP - Life Coaching

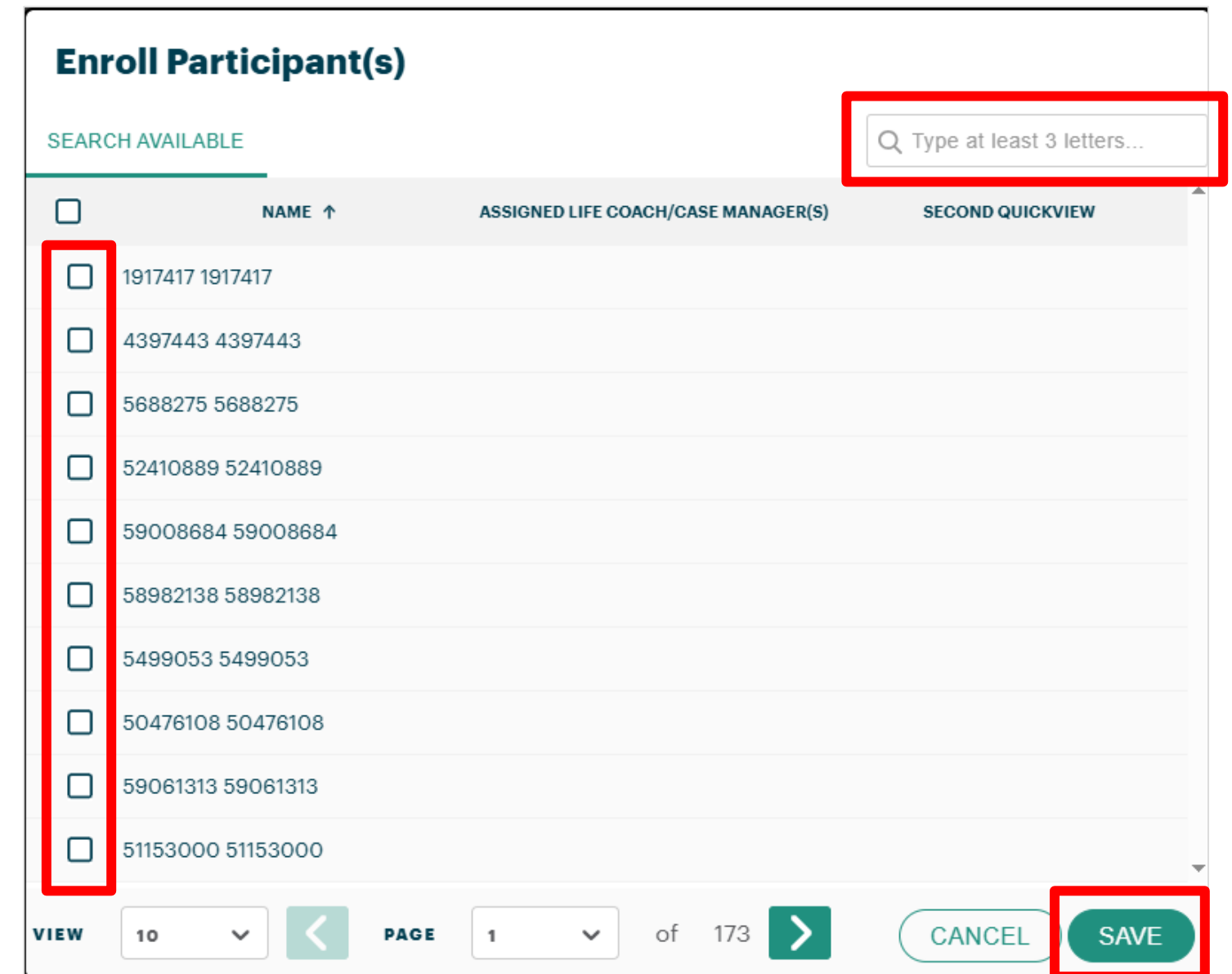
Show More ▾ Edit

Attendance   

Enrolling Participants

Step 3: Search participants' names in the search box and select them by checking the box to the left of their name

Step 4: Click the “Save” button on the bottom right.



Enroll Participant(s)

SEARCH AVAILABLE

🔍 Type at least 3 letters...

☐	NAME ↑	ASSIGNED LIFE COACH/CASE MANAGER(S)	SECOND QUICKVIEW
☐	1917417 1917417		
☐	4397443 4397443		
☐	5688275 5688275		
☐	52410889 52410889		
☐	59008684 59008684		
☐	58982138 58982138		
☐	5499053 5499053		
☐	50476108 50476108		
☐	59061313 59061313		
☐	51153000 51153000		

VIEW 10 < PAGE 1 of 173 > CANCEL **SAVE**

Marking Weekly Attendance

Step 1: Return to the cohort page by clicking the eye button next to the cohort name.

Step 2: To mark attendance, click the “✓” button to mark them as present or the “X” button to mark them as absent. The record auto-saves.

Attendance
Enroll Participant(s)
Session Manager

View Today
<
>
Apr 2025
Show Unenrolled
Search...

First Name (A-Z)
SUN 13
MON 14
TUE 15
WED 16
THU 17
FRI 18
SAT 19

			✓	✗				
			✓	✗				
			✓	✗				
			✓	✗				
			✓	✗				
			✓	✗				
			✓	✗				



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>Job Placement Summary</u>	This report provides all job placements within a specific time range by participant and by employer, as well as all job placement exits during a specific time range.
<u>Work Placement and Hours</u>	This report provides all job placements (continuous and ended) as well as the number of job placement hours per participant.
<u>Classes & Terms</u>	This report provides attendance for all cohorts recorded in “Classes & Terms” within a specific date range.