# 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**

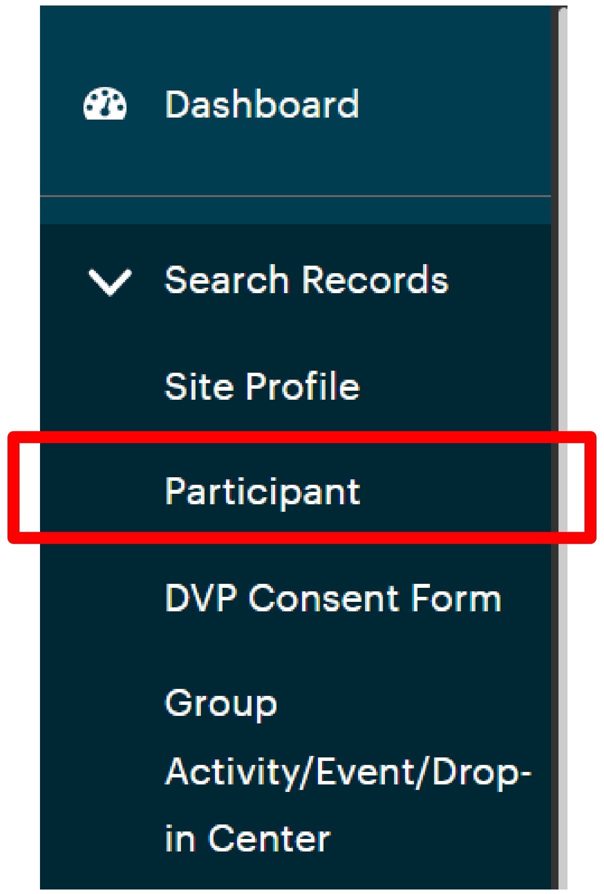
- Percentage of individuals who are successfully placed in work experience opportunities.
- Number of individuals who complete 100 hours of work experience.

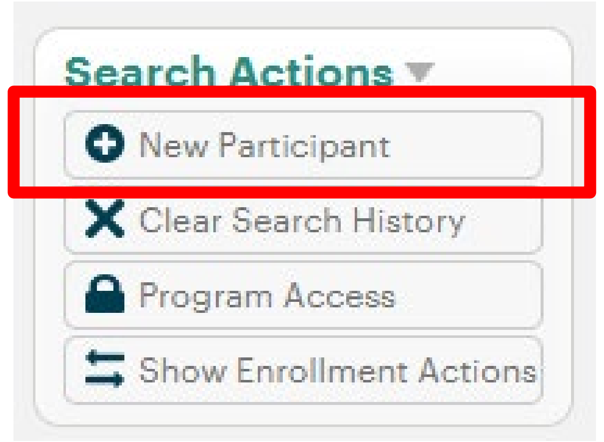
# Participant Records

# Creating a Participant Record

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

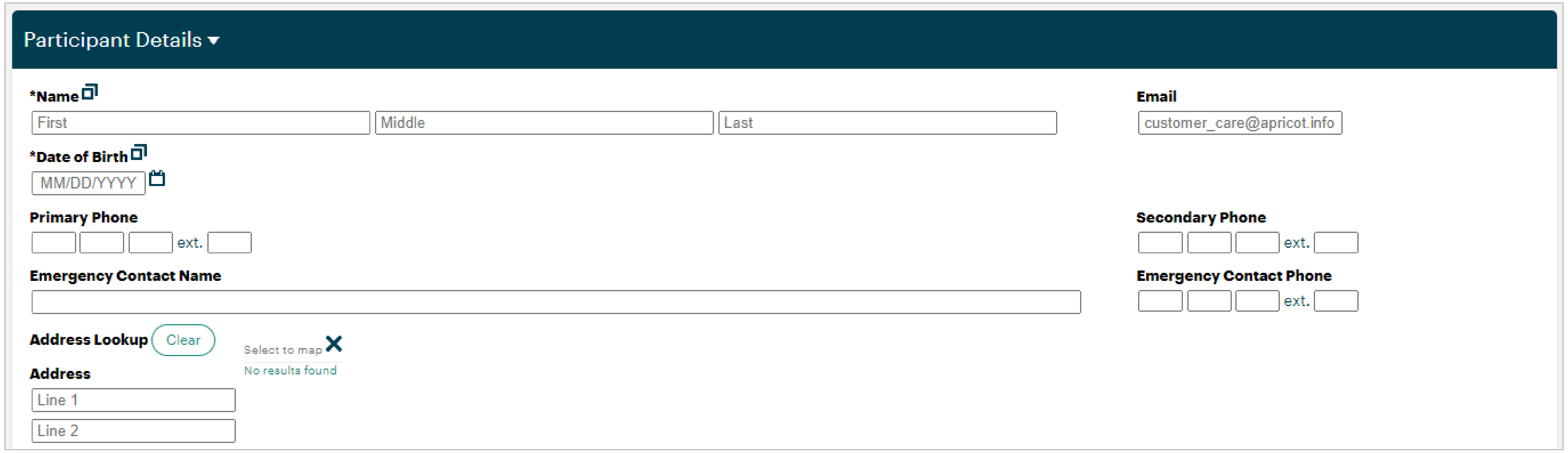
**Step 2:** Select “+ New Participant” on the right side of the screen.

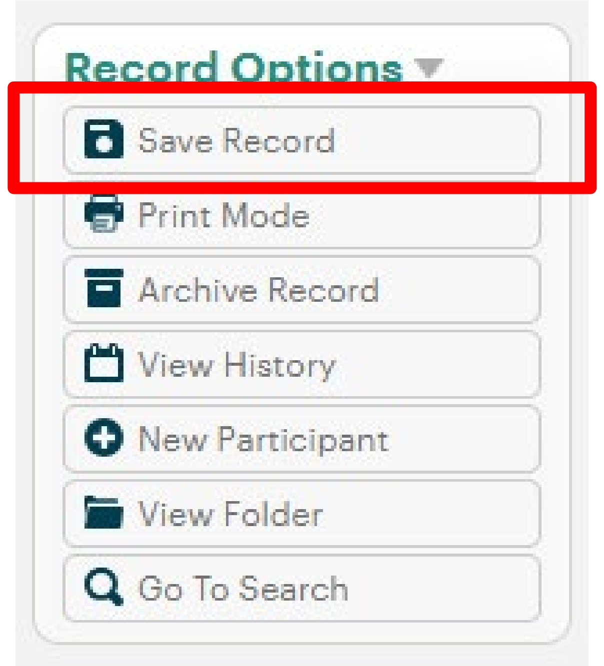


# Creating a Participant Record

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




**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.

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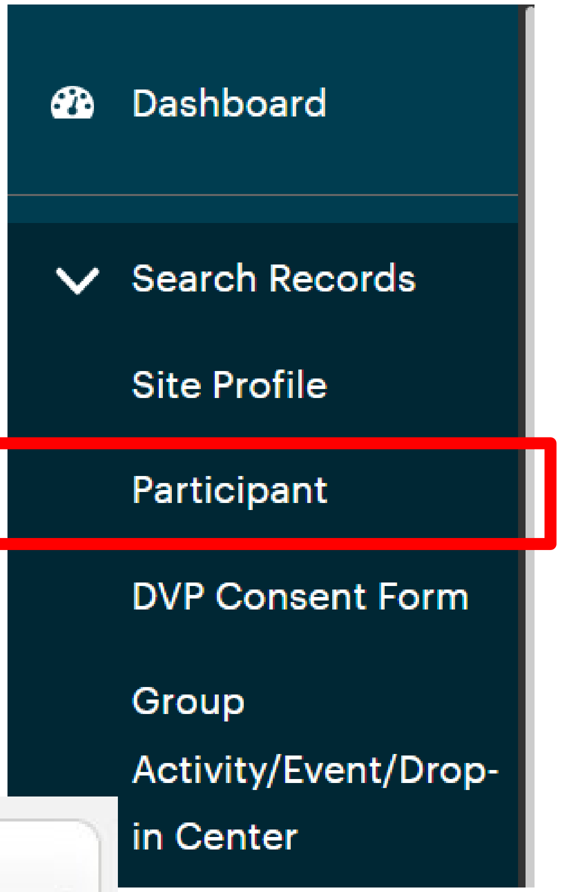
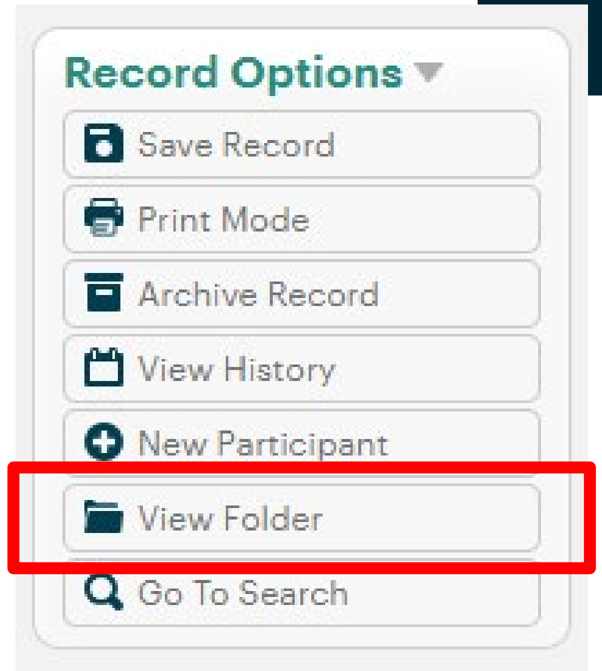
# Accessing a Participant’s Folder

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

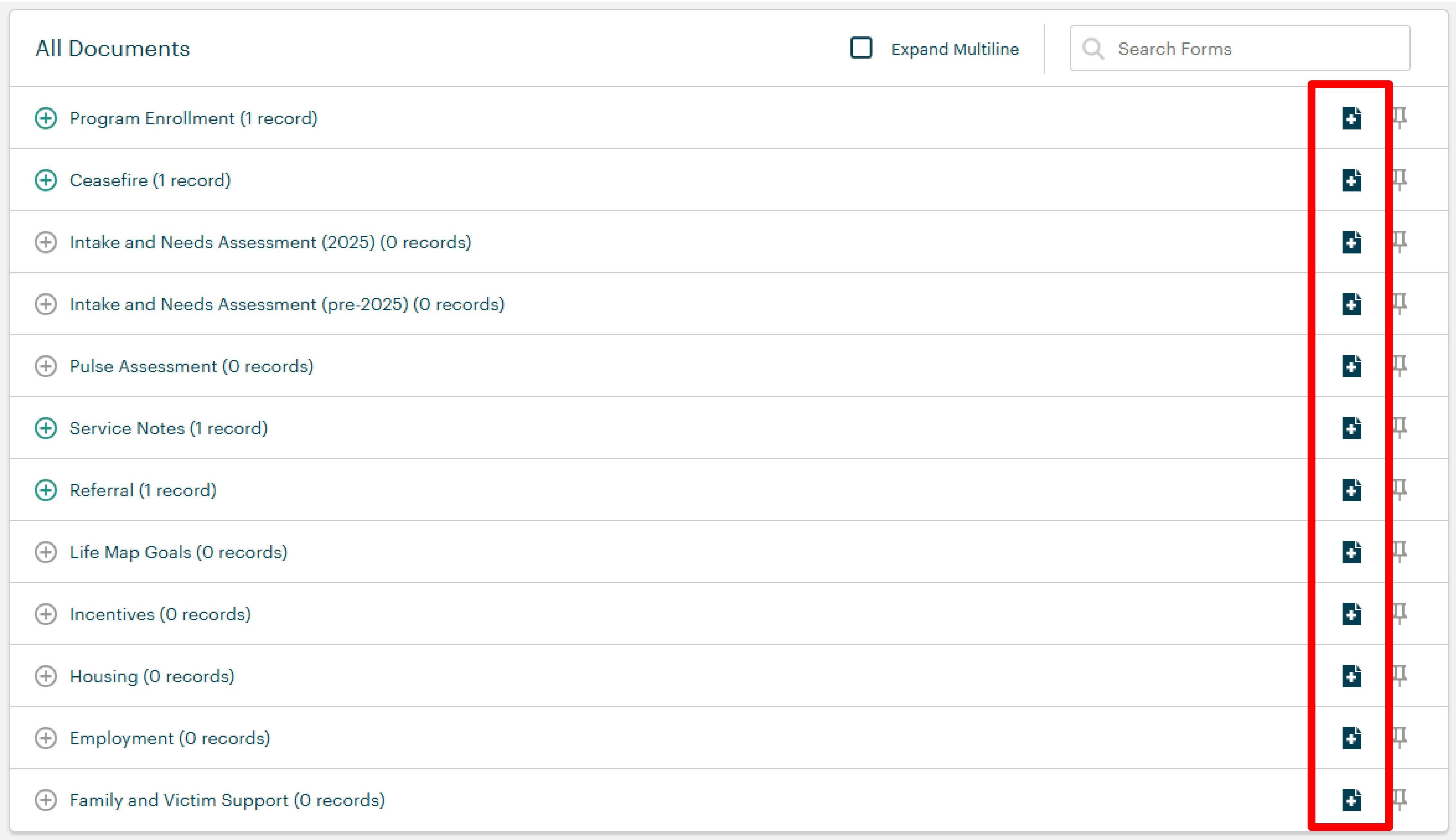
**Step 2:** Find the participant and click on their name. Then, select “View Folder” on the right side of the screen.



# Accessing a Participant’s Folder

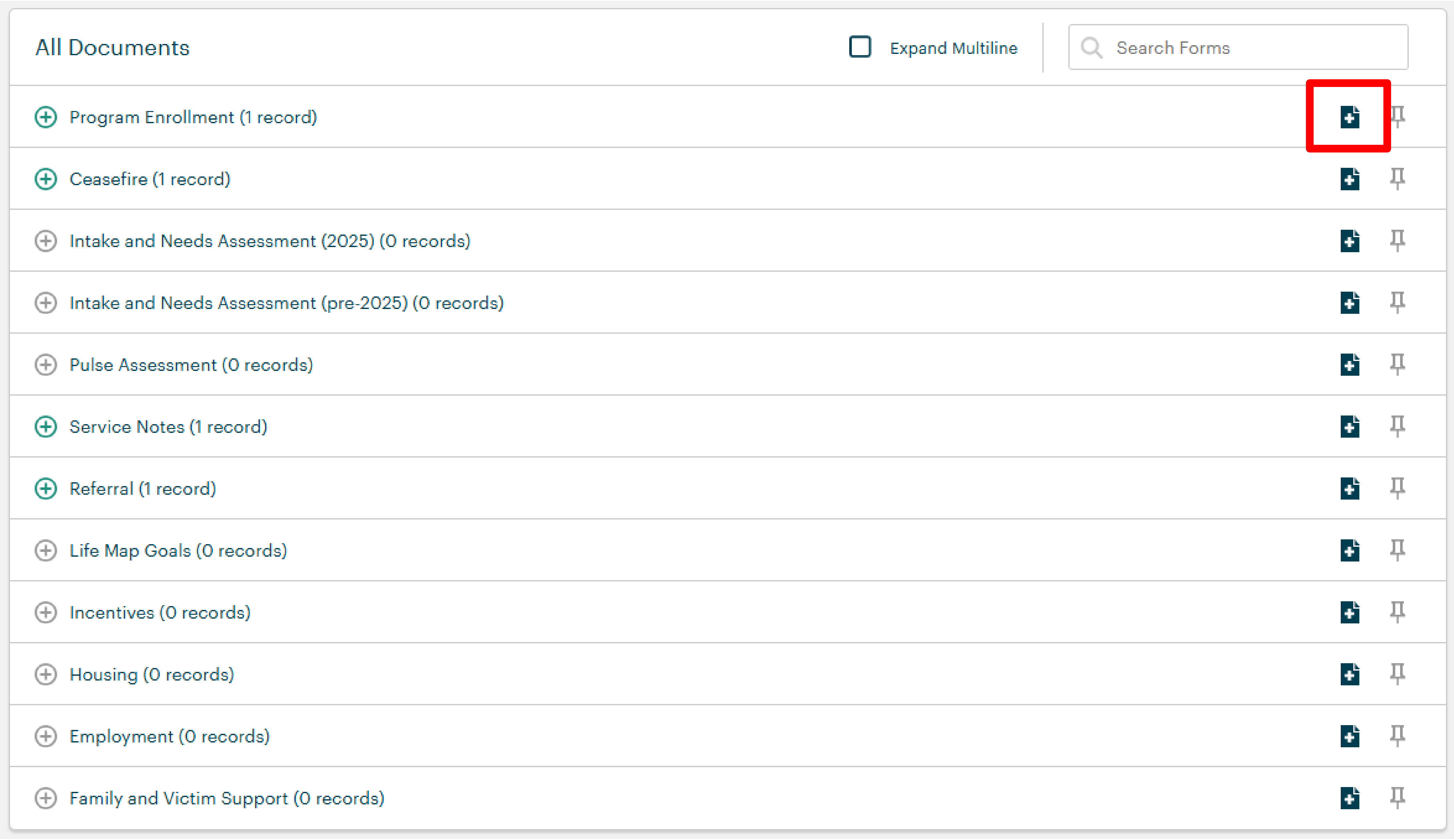
This is the participant’s folder, where all service delivery records are stored. To add a new record in any folder, click the “+” icon in the correct row.



# Program Enrollment Form

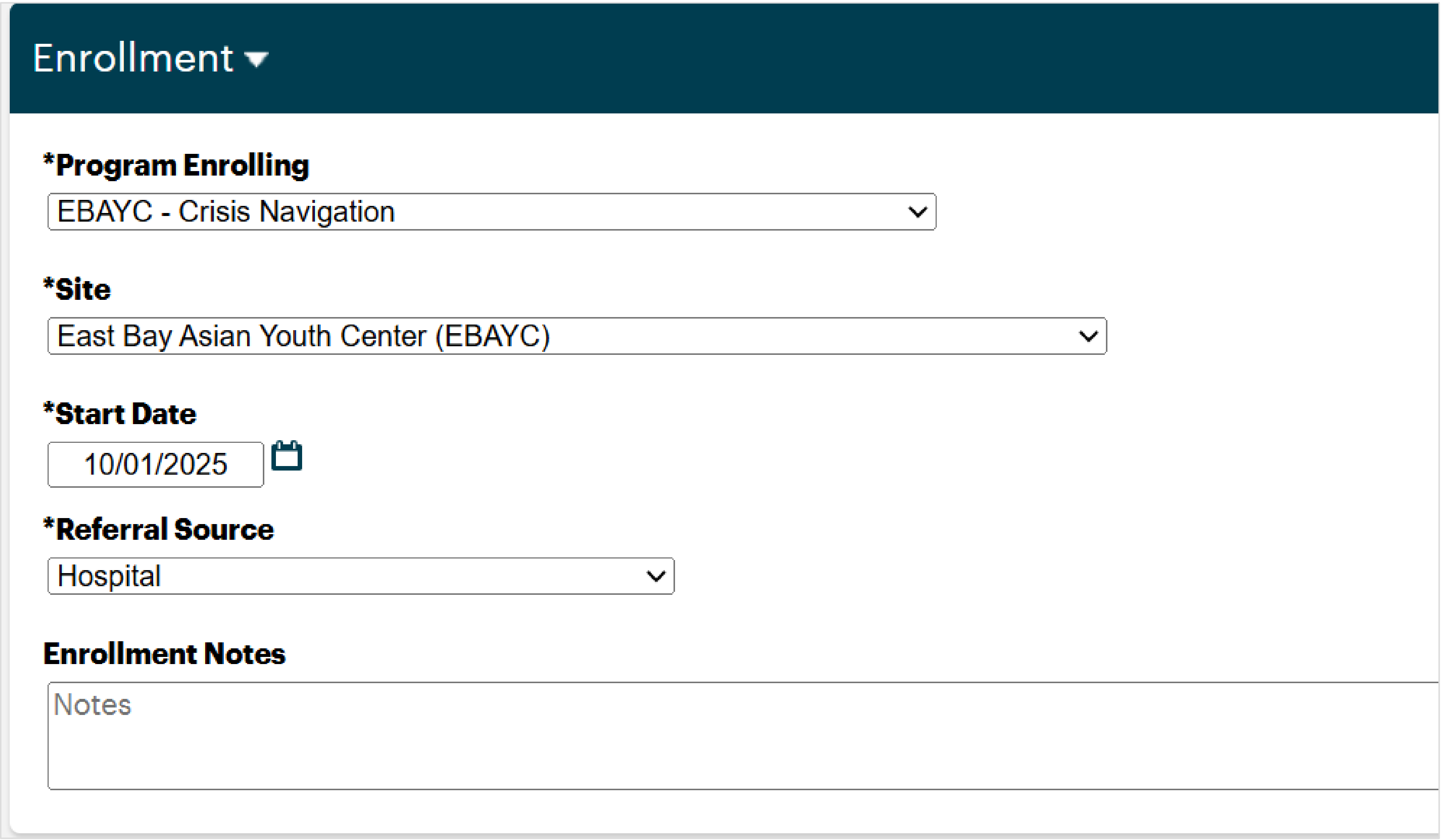
# Enrolling a Participant

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



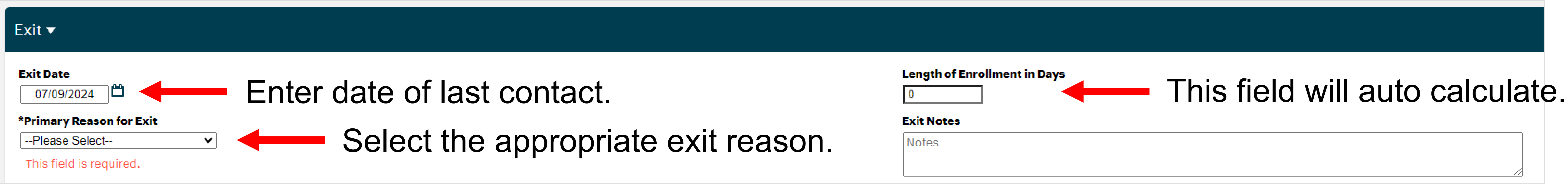
# Enrolling a Participant

**Step 2:** Complete the “Enrollment” section of the form. Then click “Save Record” on the right side of the screen.



# Exiting a Participant

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



# Consent Form

# Types of consent forms

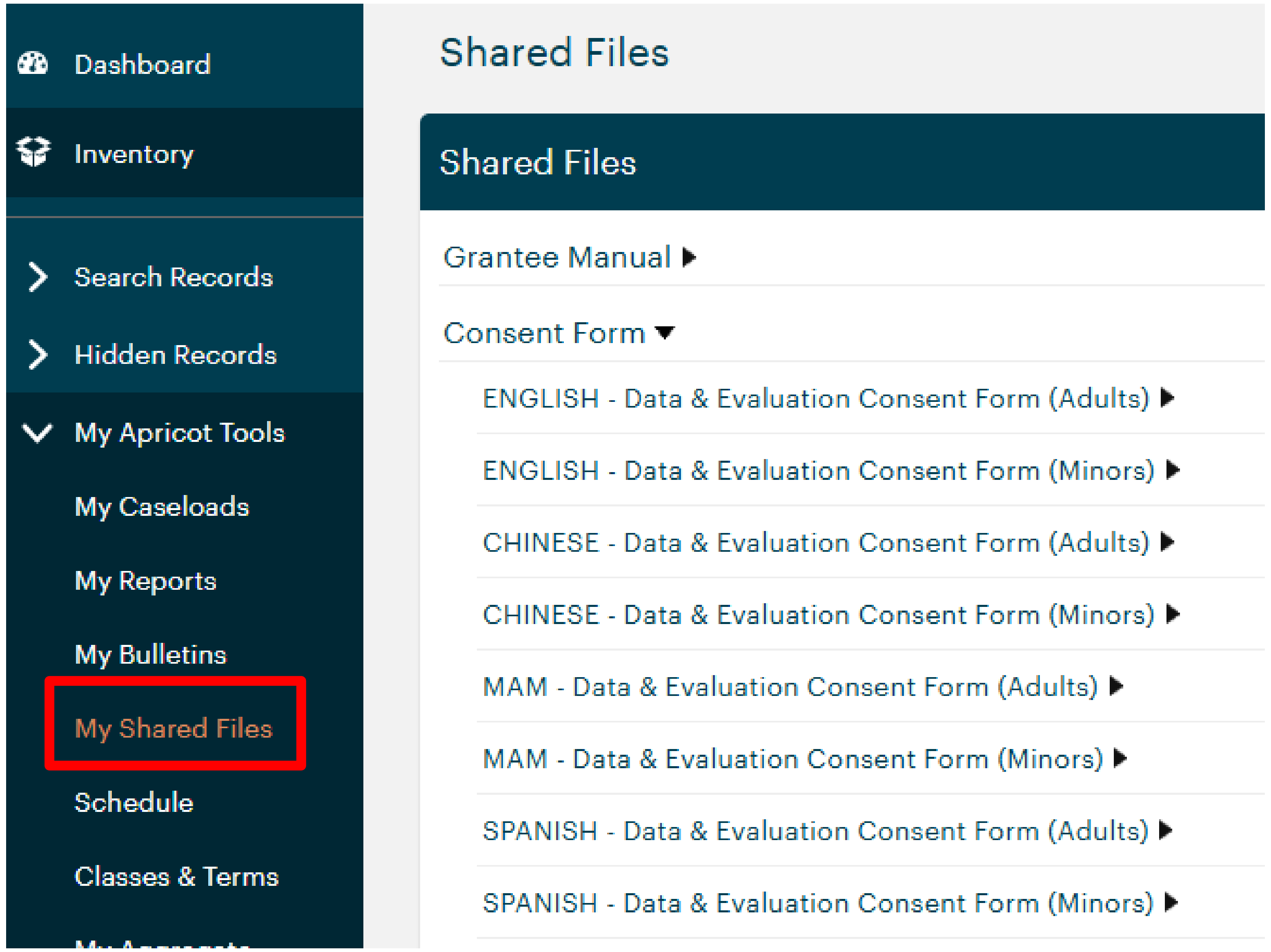
Once a participant enrolls in ongoing services, present the consent form to them within 30 days. There are three versions of the consent form based on the participant's age and the type of service they are receiving:

- 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.

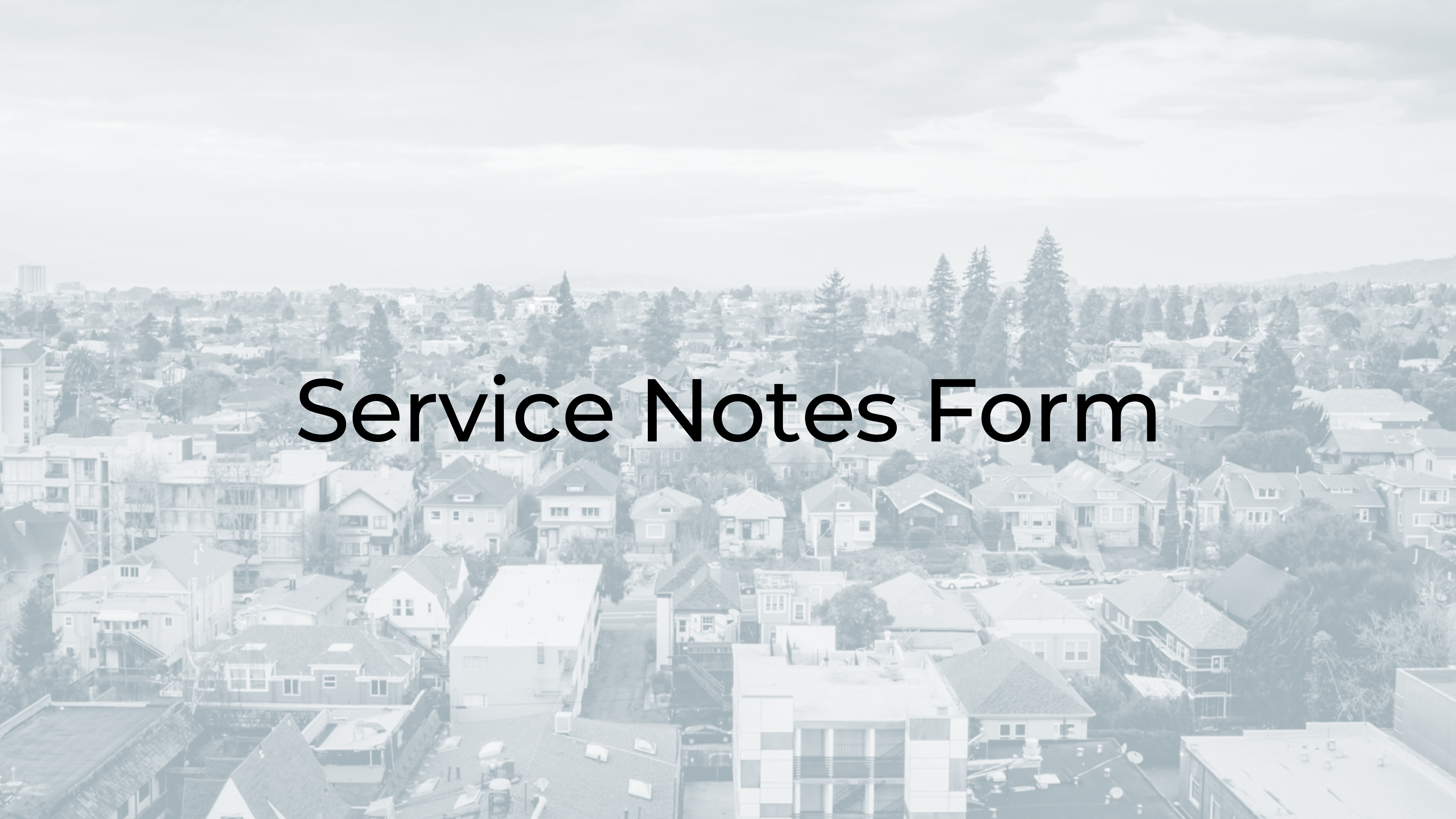
**Optional**

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

# Explaining consent forms

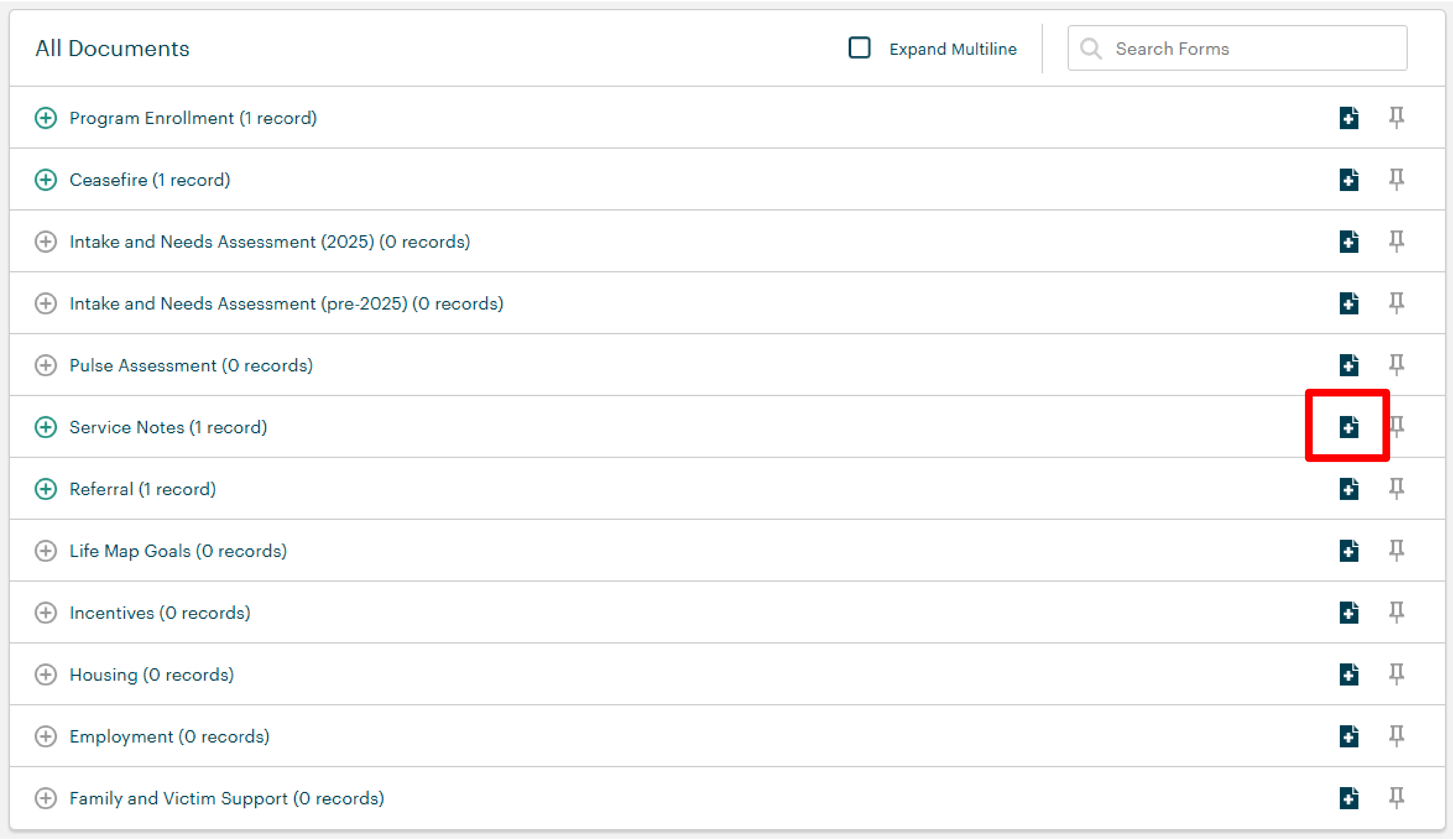
| | |
|---|---|
| What & Why | • For youth and adults receiving gender-based violence services, the consent form also asks if it is okay to enter personally-identifiable information like your name and date of birth in a safe database that staff use to provide high-quality services to you. |
| Privacy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



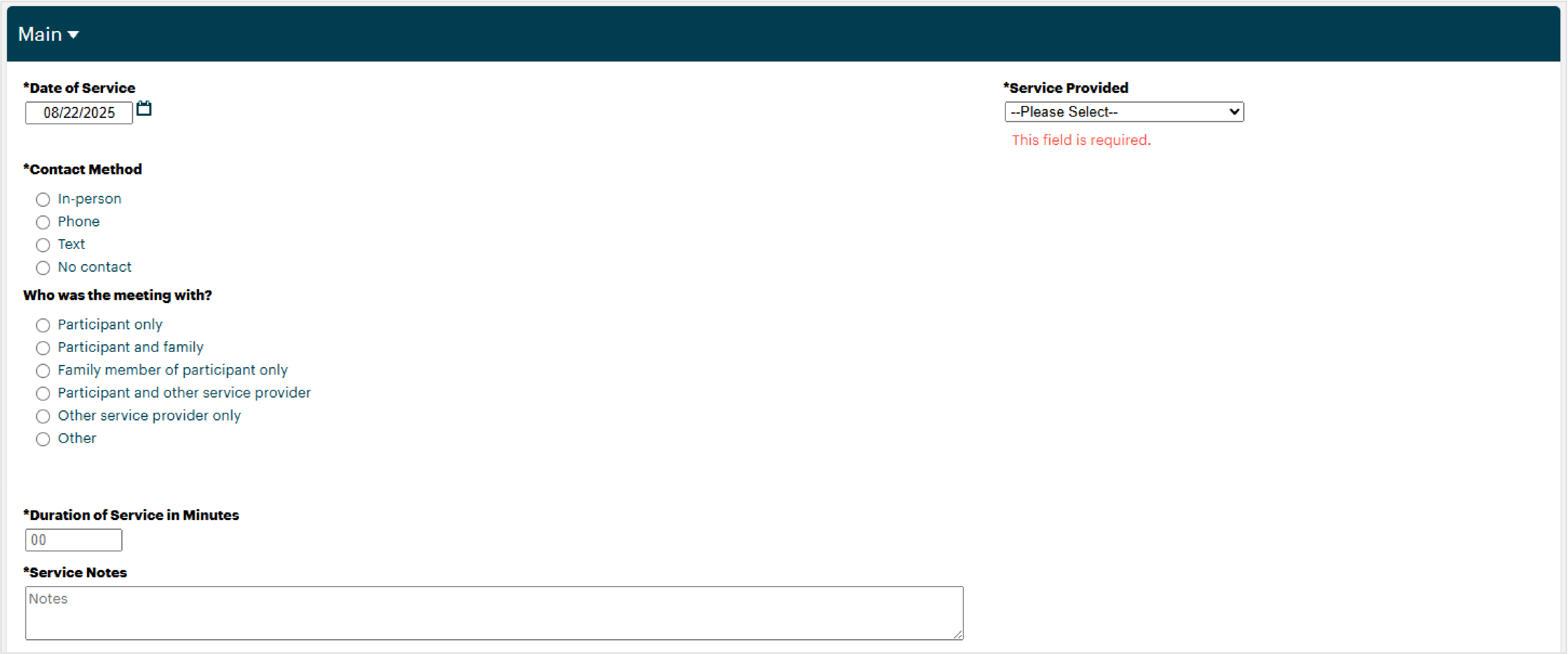
# Service Notes Form

**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

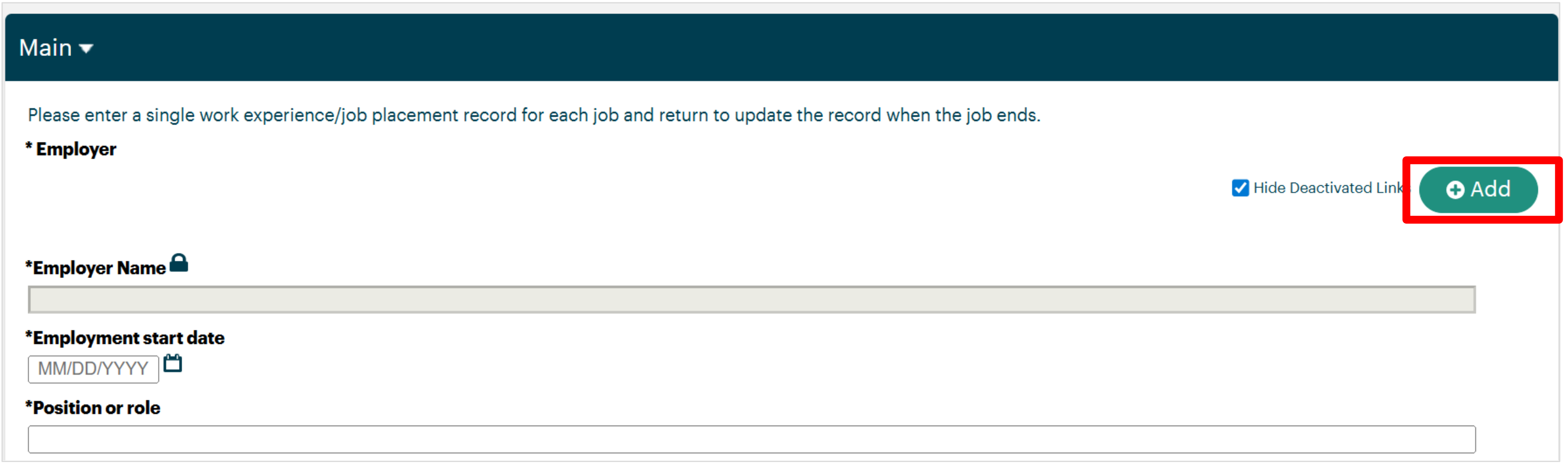
*Service Notes
Notes

# Employment Form

# Placement Start

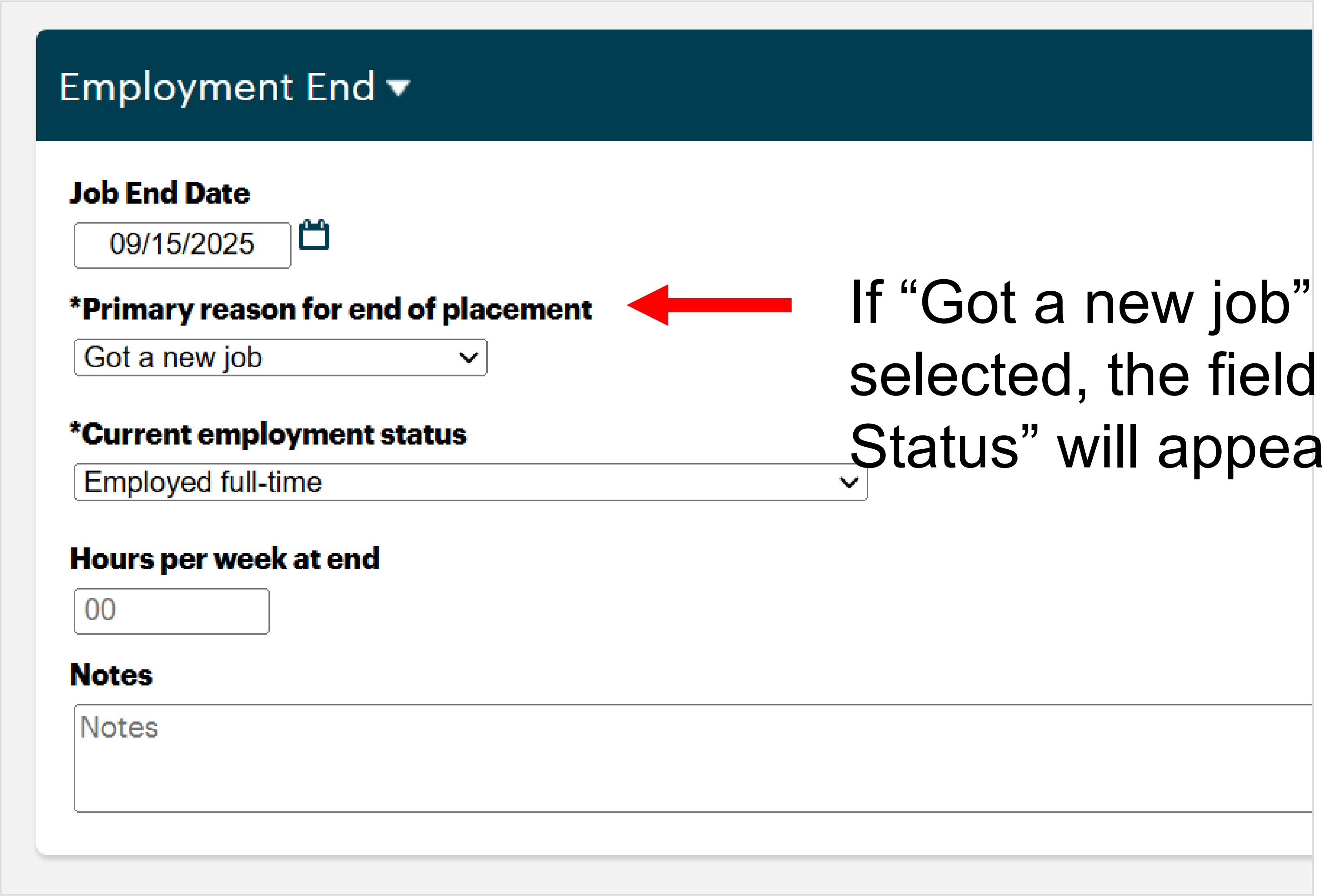
Complete an **Employment Form** when a participant starts a job, a training program, or work experience as part of their services.

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.



# 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.



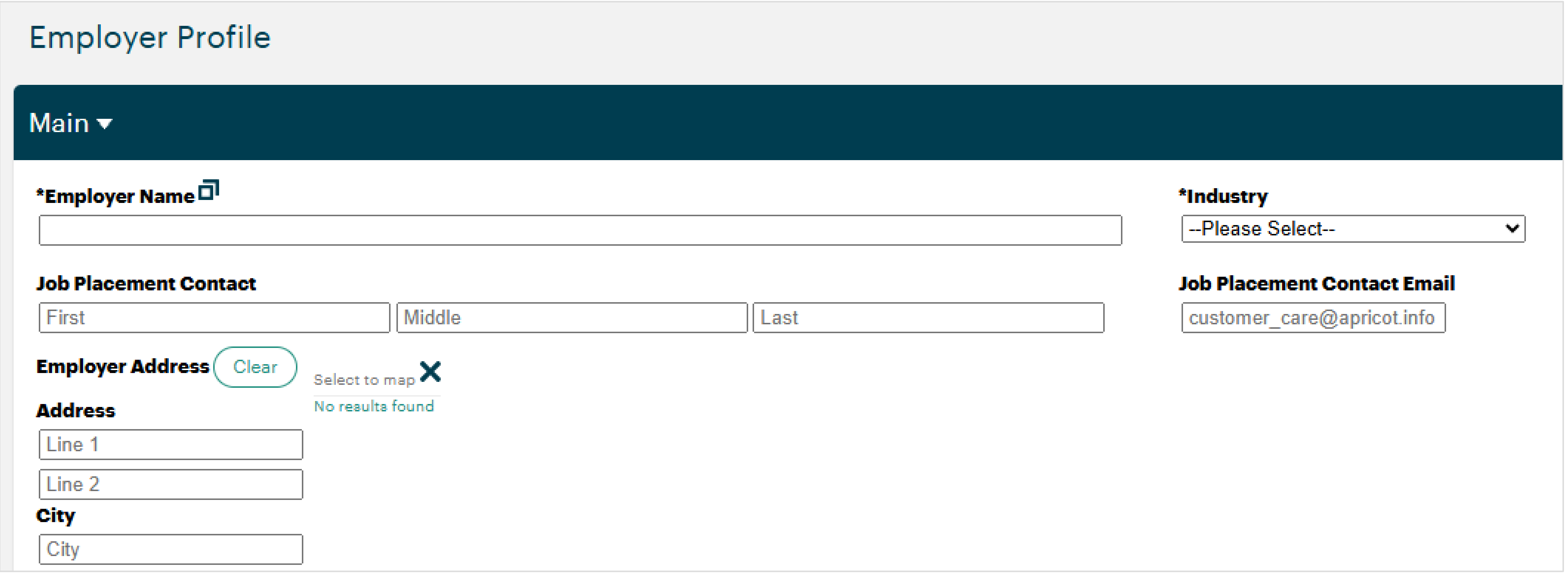

If “Got a new job” or “Employment program ended” is selected, the field below called “Current Employment Status” will appear and require a response.

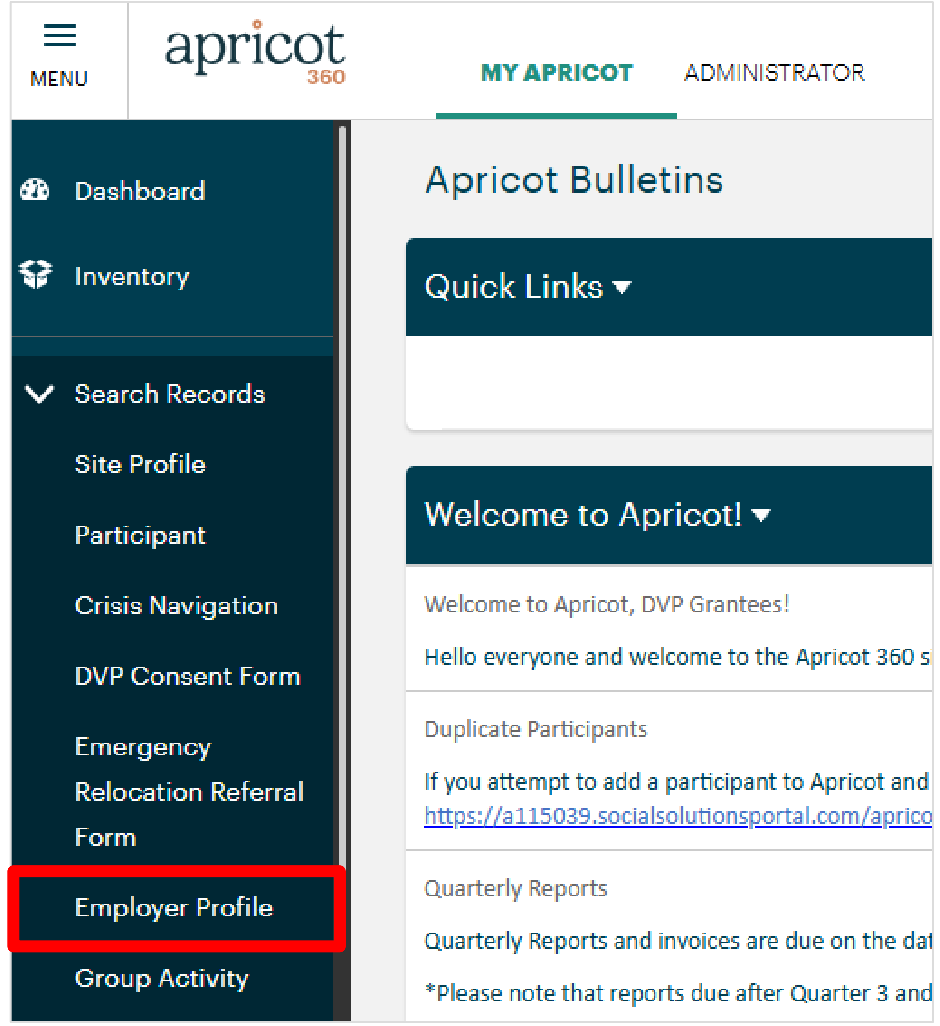
# Employer Profile Form

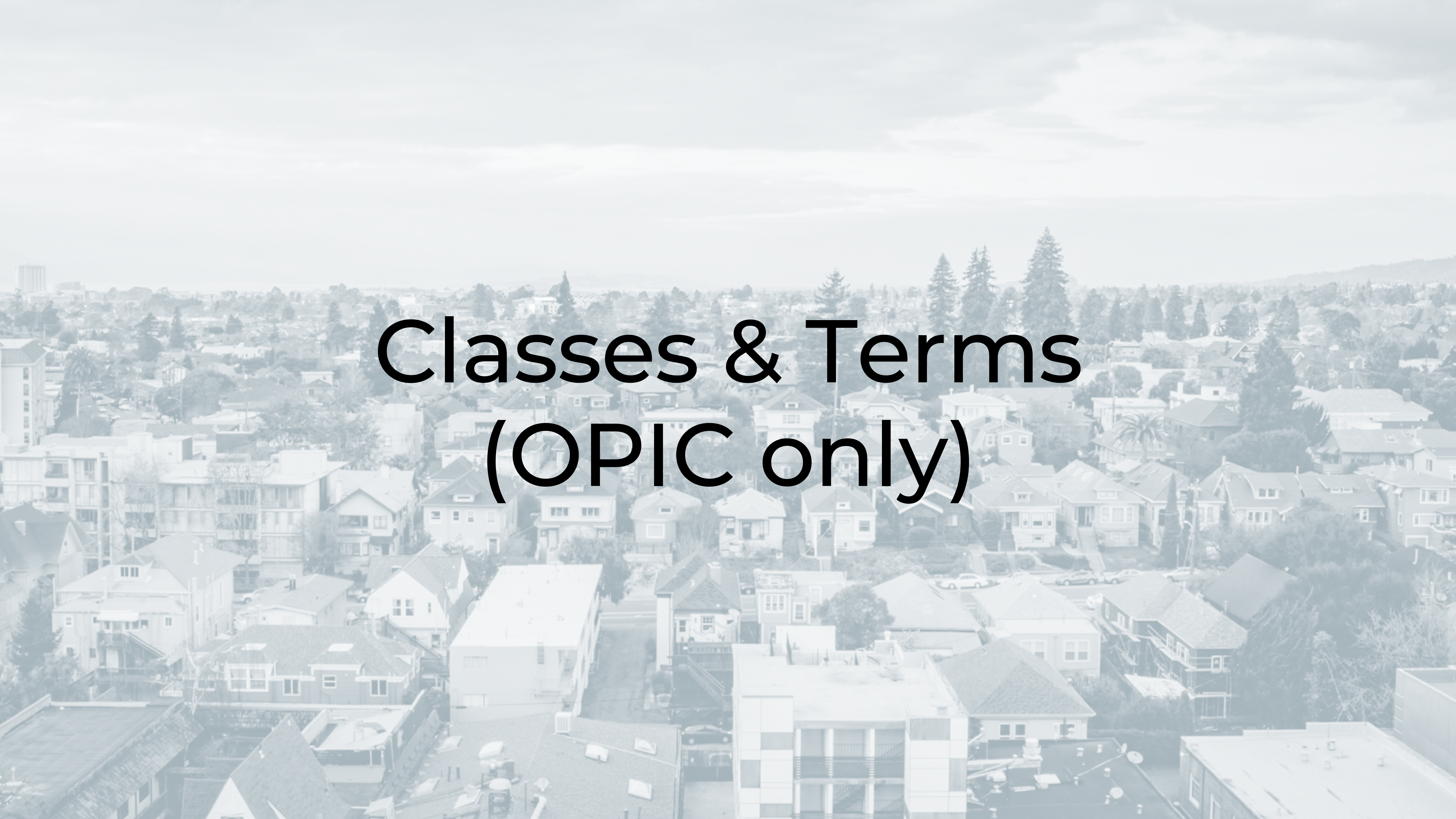
# Entering an Employer Profile

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

**Step 2:** Add a new record and enter details.



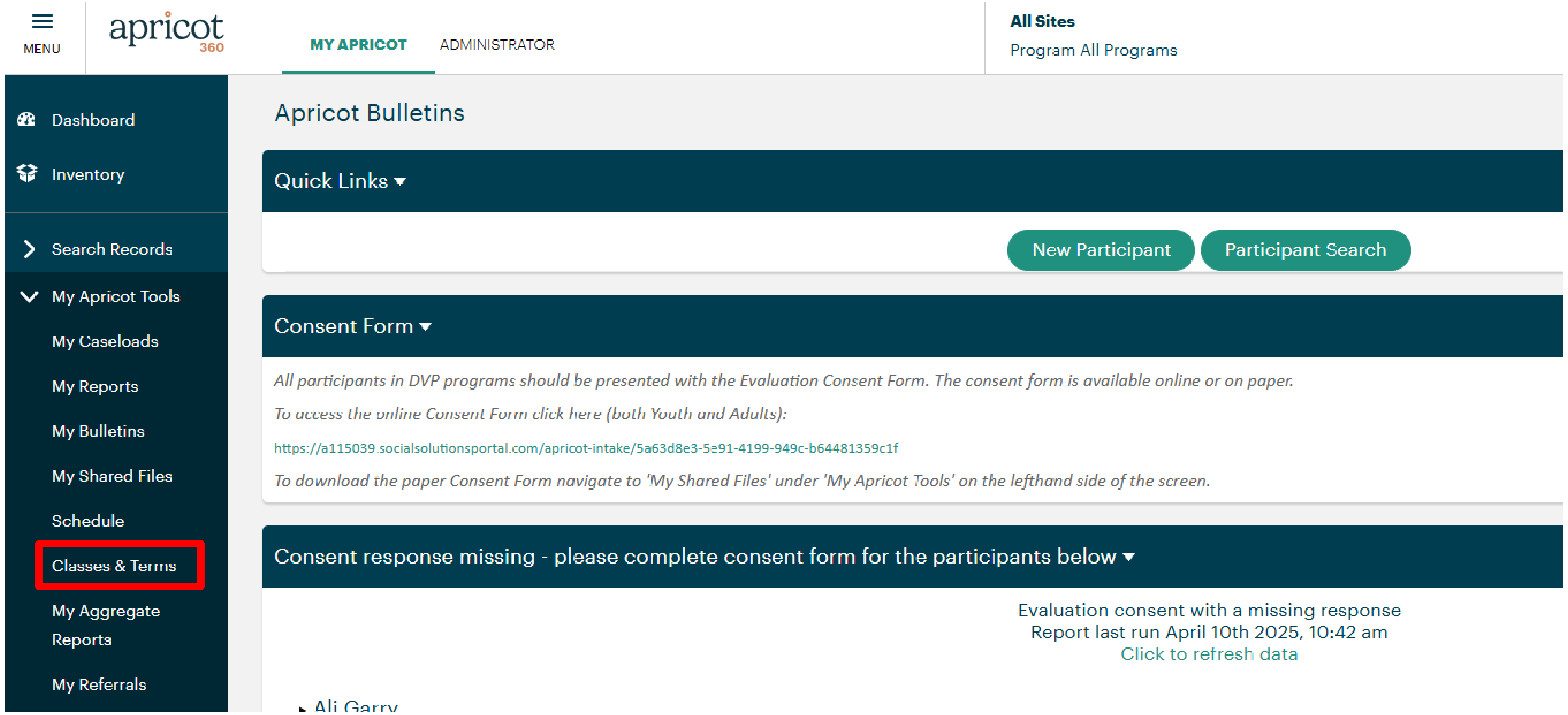





# Classes & Terms (OPIC only)

# Creating a New Class Cohort

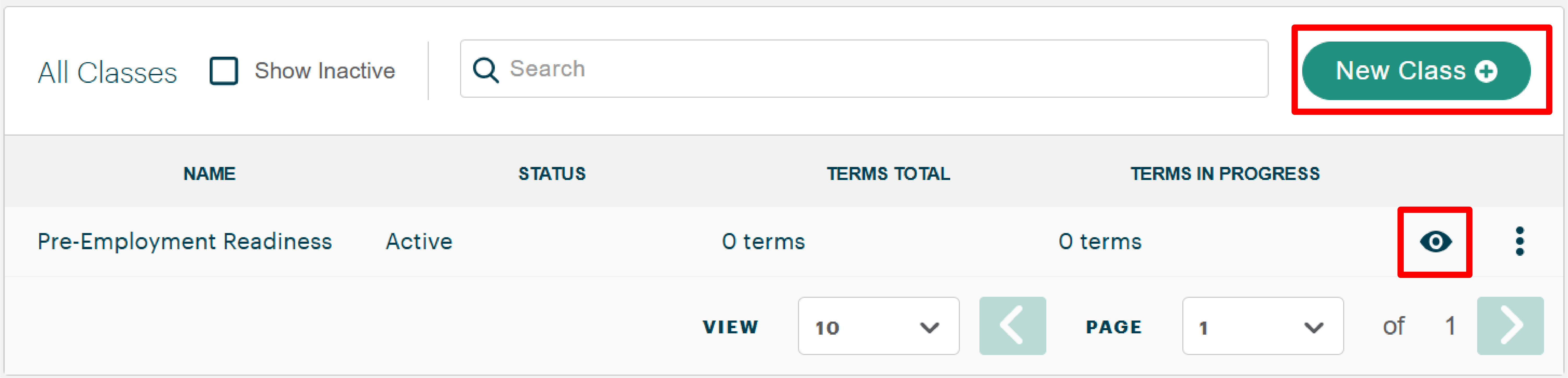
**Step 1:** Select “Class & Terms” on the lefthand side of the screen.



# Creating a New Class Cohort

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

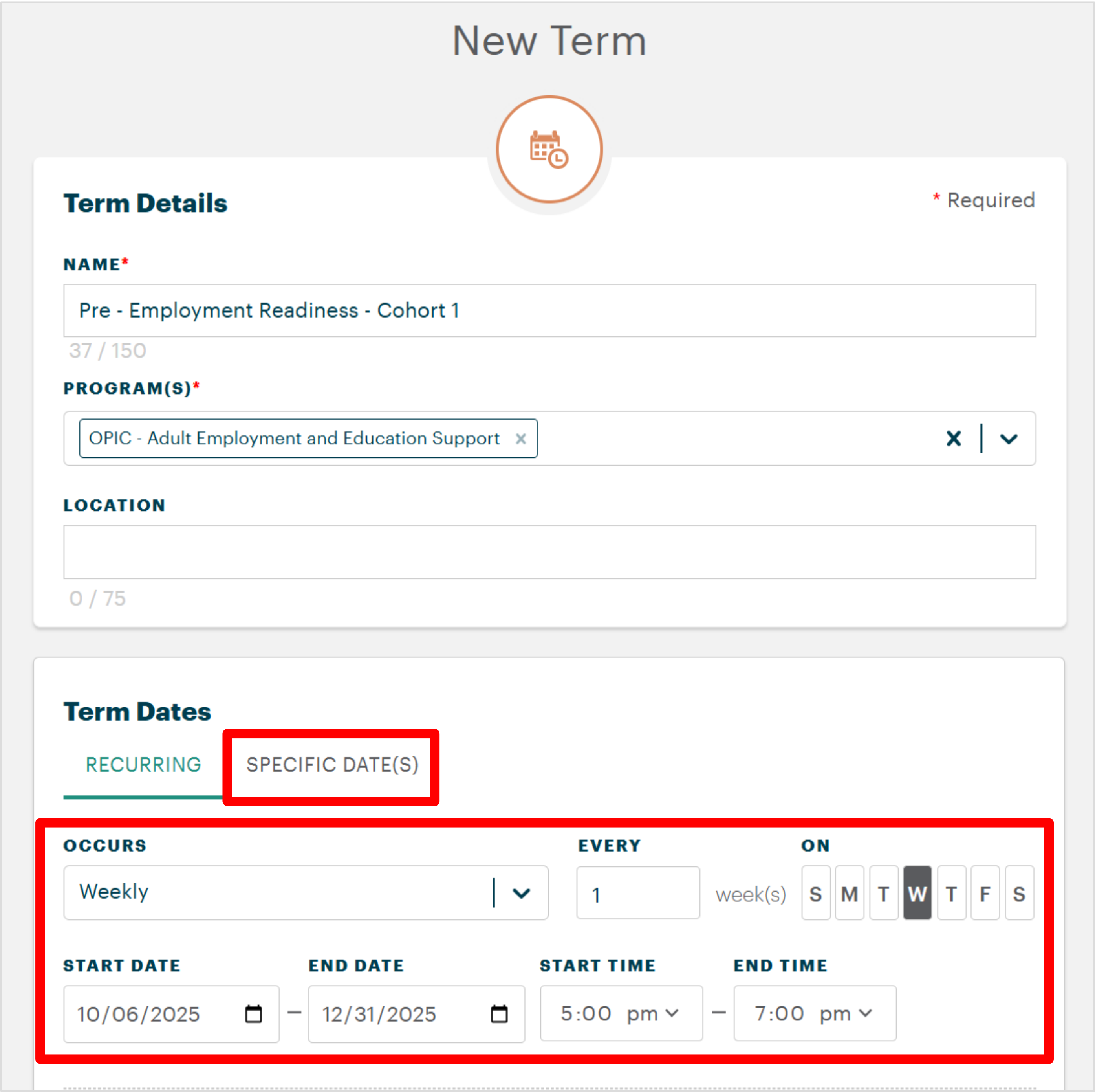
**Step 3:** Once the class is created, create a new cohort by clicking the eye button.



# 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.

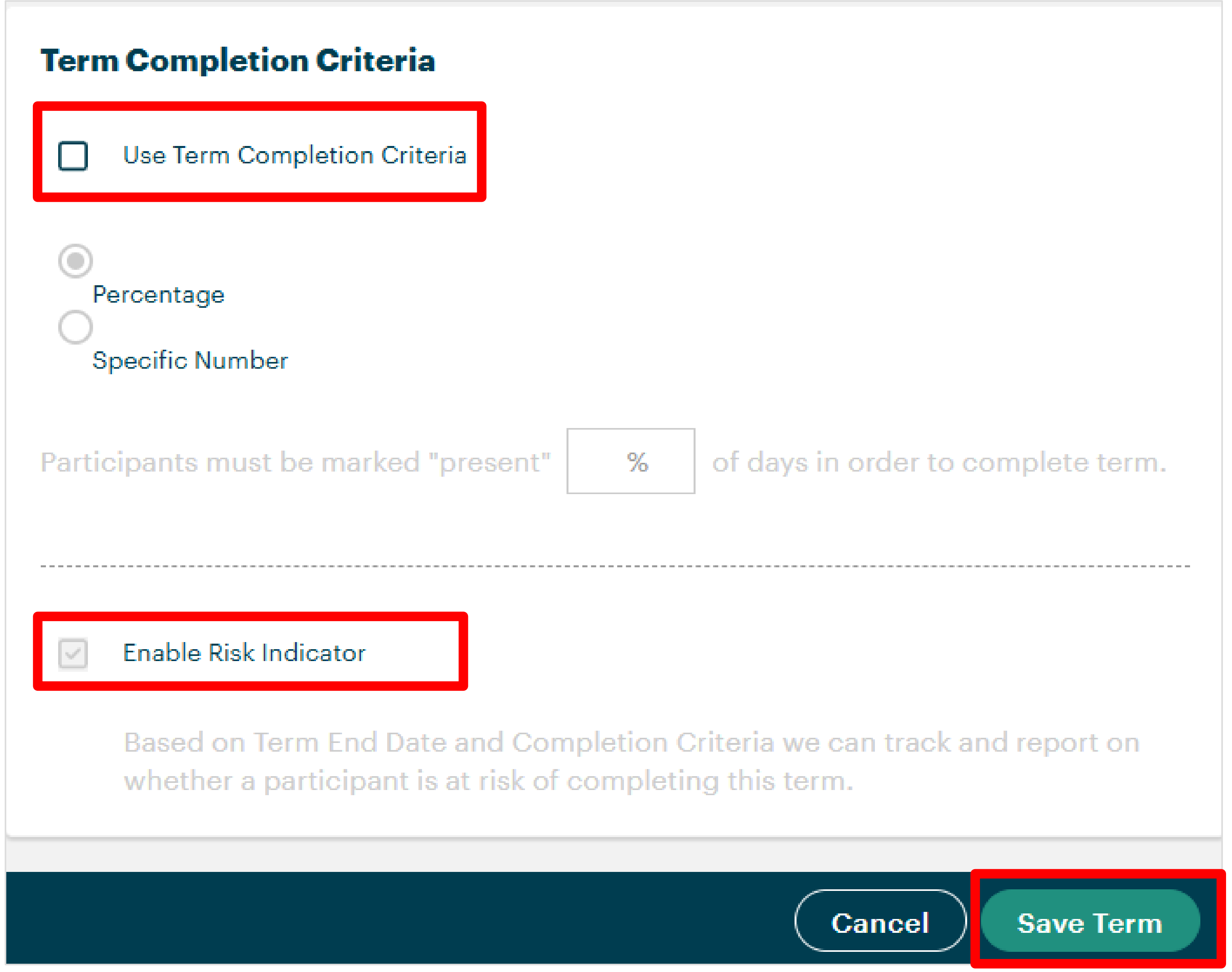
Note: If there are specific dates that the class is not happening (e.g. holidays), click on “specific dates” to mark them.



# Creating a New Class Cohort

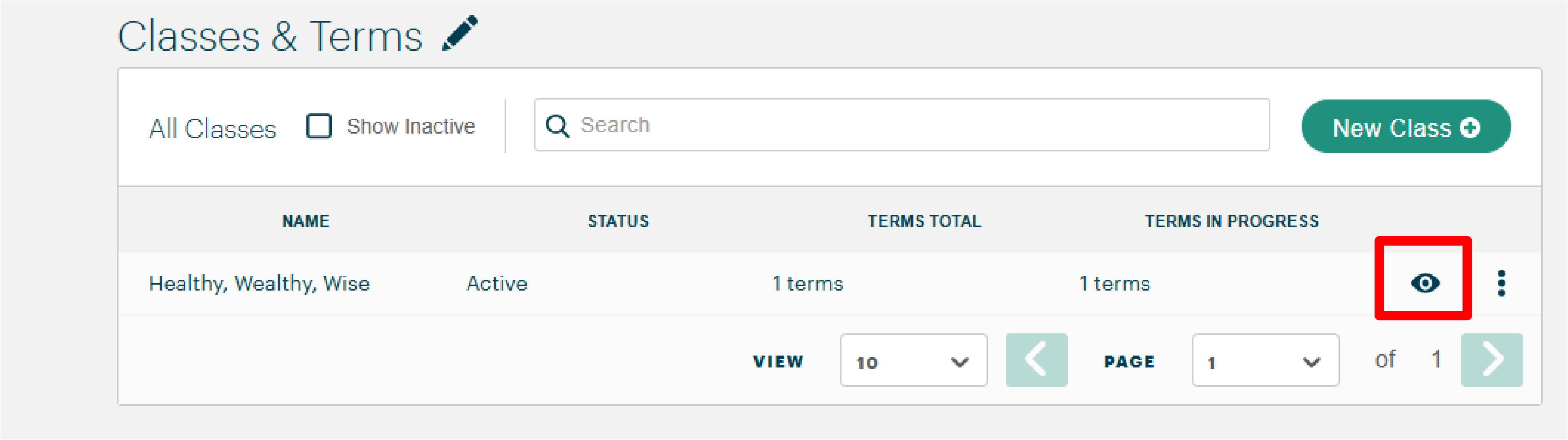
**Step 5:** Uncheck “Use Term Completion Criteria” and “Enable Risk Indicator.” Those features will not be used.

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

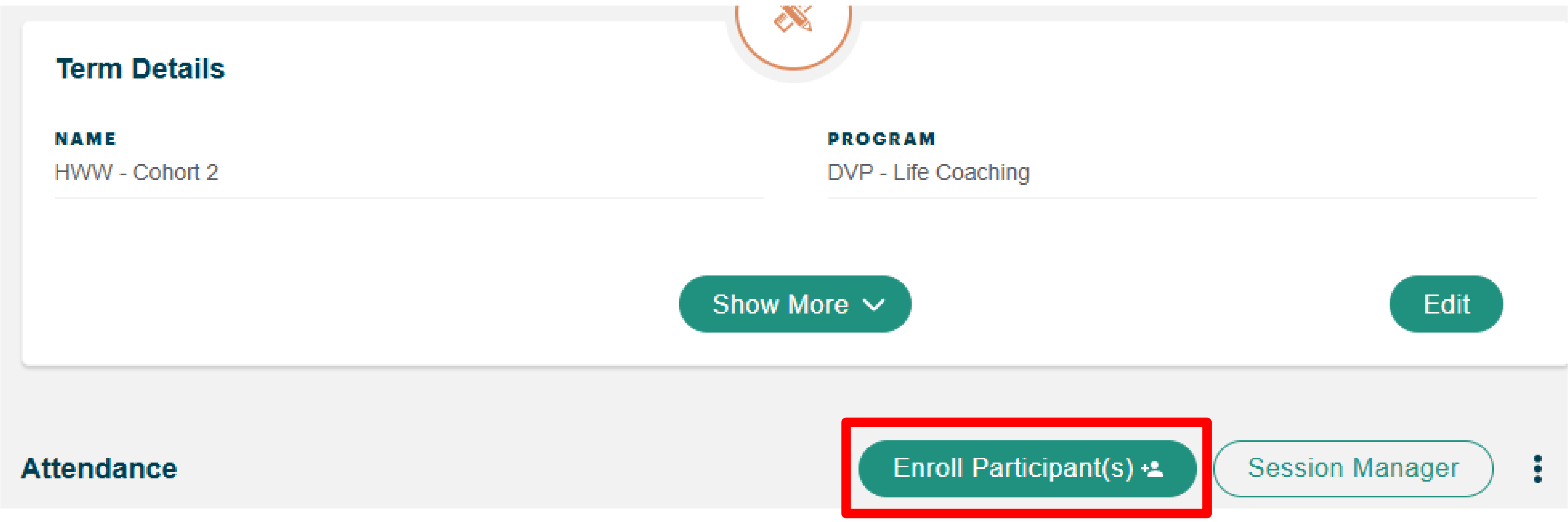


# Enrolling Participants

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



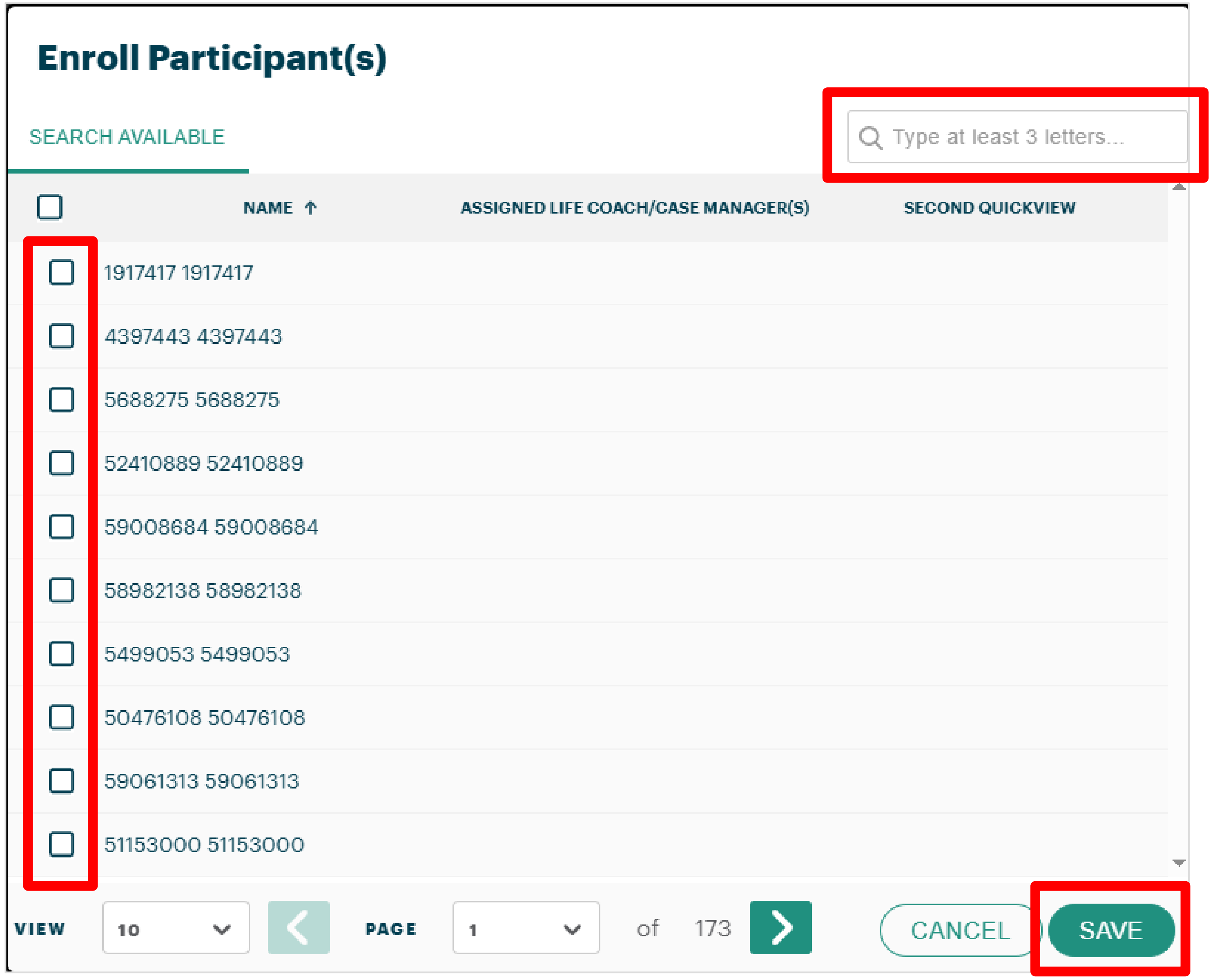

**Step 2:** Click the "Enroll Participants" button.



# 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.



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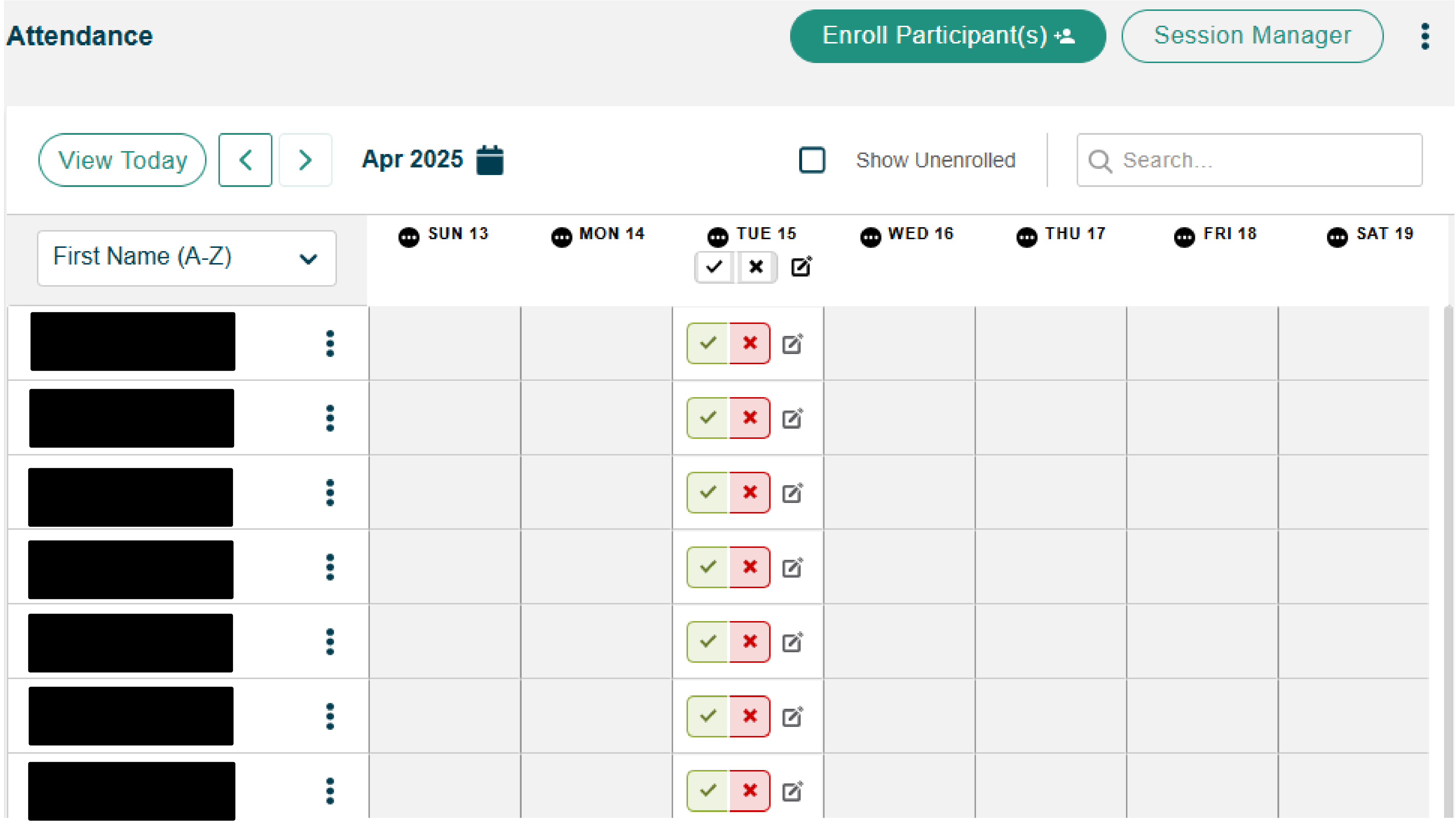
# Marking Weekly Attendance

**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.



# Recommended Reports

# Recommended Reports

| Report with link | Information provided by report |
|---|---|
| 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. |
| Job Placement Summary | 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. |
| Work Placement and Hours | This report provides all job placements (continuous and ended) as well as the number of job placement hours per participant. |
| Classes & Terms | This report provides attendance for all cohorts recorded in “Classes & Terms” within a specific date range. |