Apricot Data Entry Instructions

Healing

September 2025

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Deliverables

Deliverables

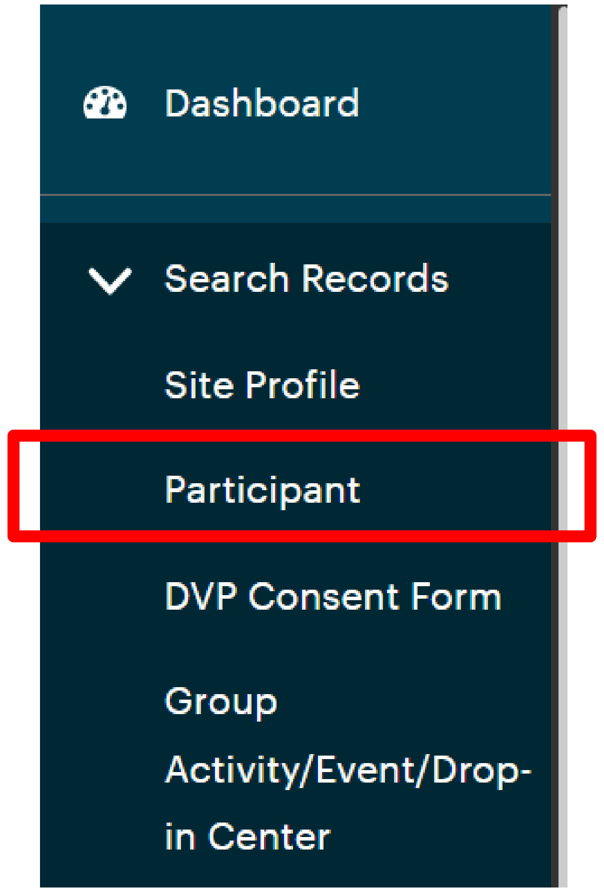
- Number of individuals served.
- Number of service hours received.
- Number of healing/support groups hosted.
- Average number of attendees at healing/support groups.

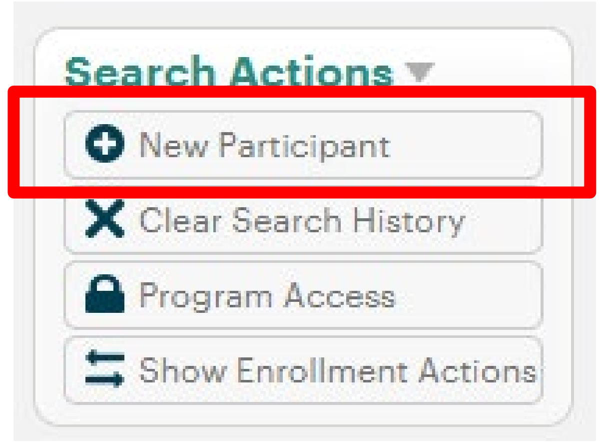
Participant Records

Creating a Participant Record

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

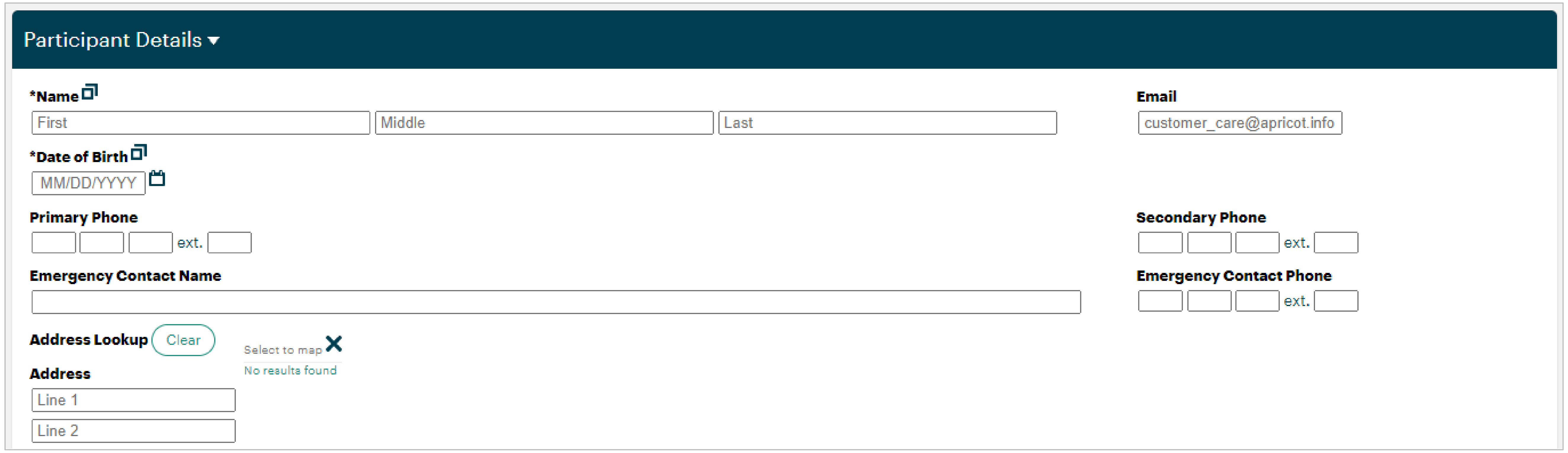
Step 2: Select “+ New Participant” on the right side of the screen.

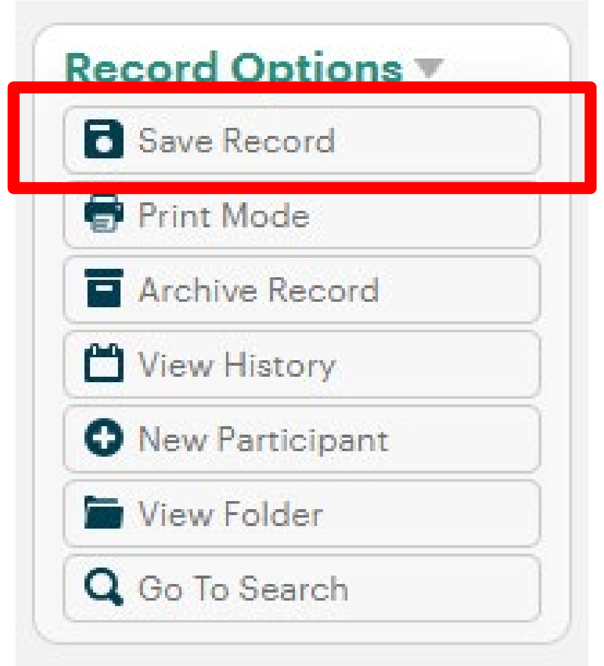




Creating a Participant Record

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

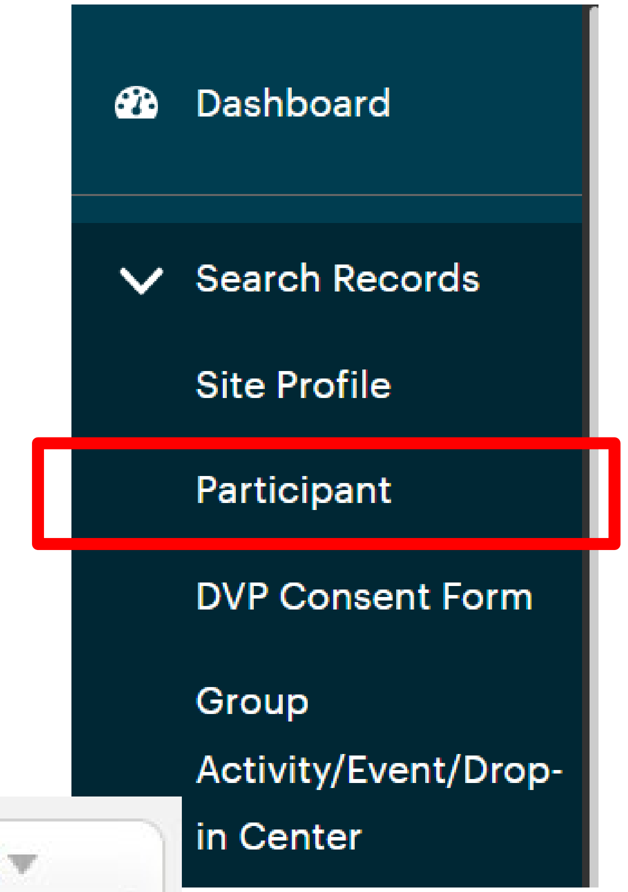
If a person is already in Apricot because they received services from a different agency, a duplicate record message will appear.

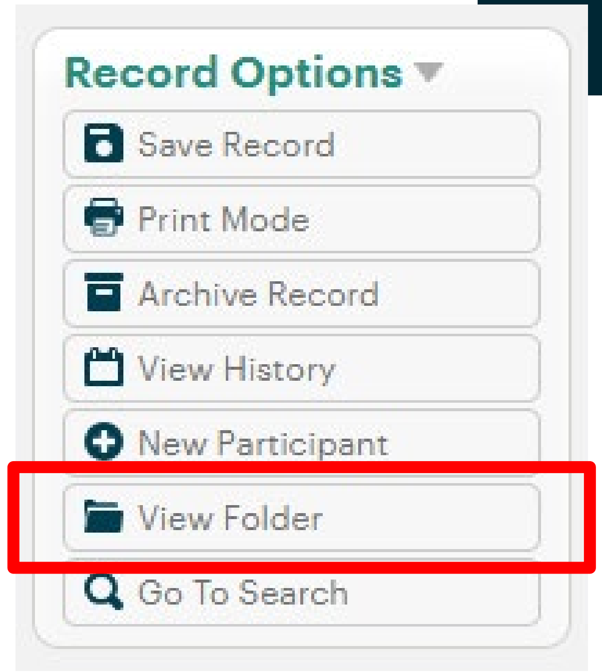
Complete this form to have the person added to your site.

Accessing a Participant's Folder

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

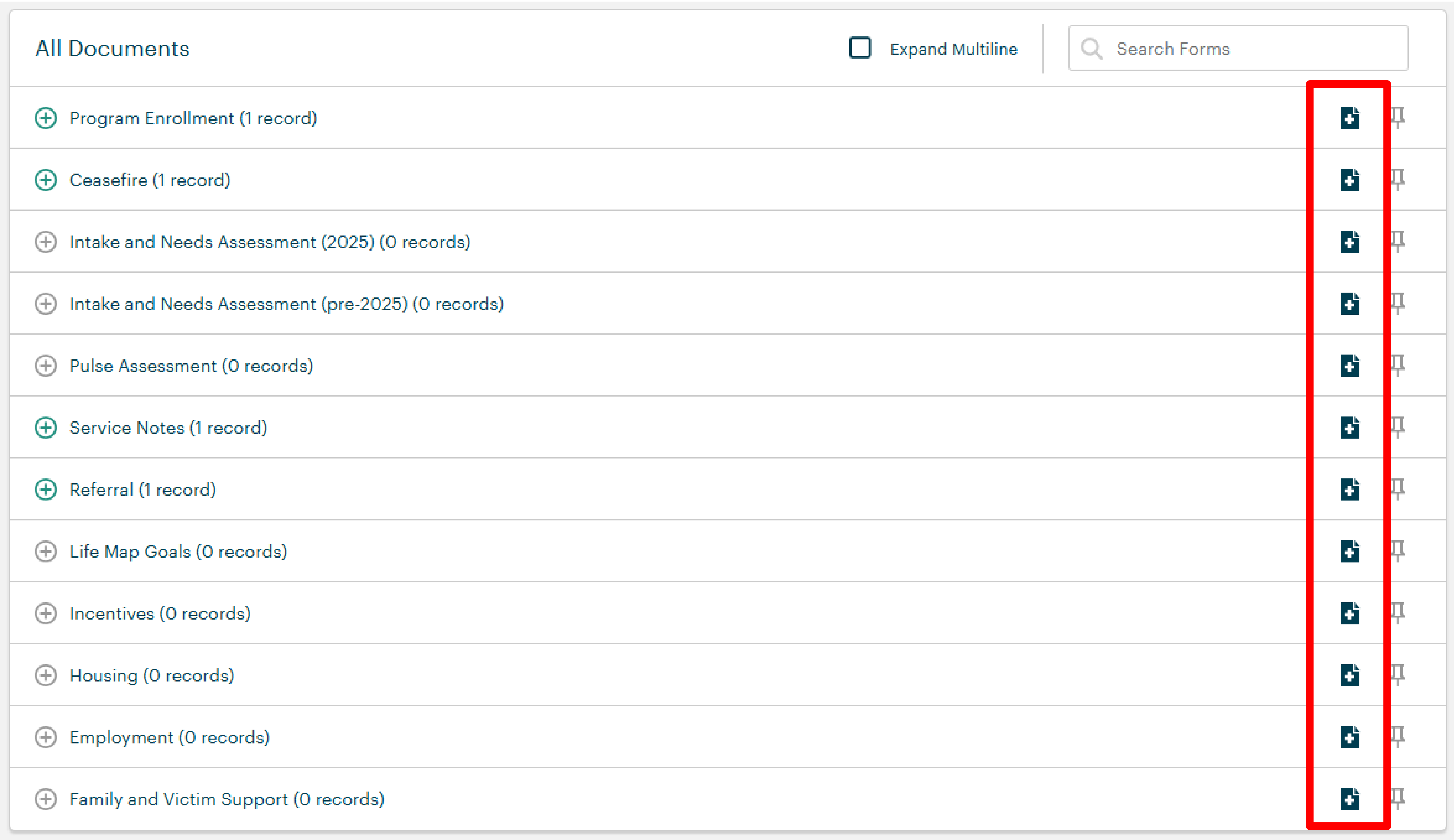
Step 2: Find the participant and click on their name. Then, select "View Folder" on the right side of the screen.





Accessing a Participant's Folder

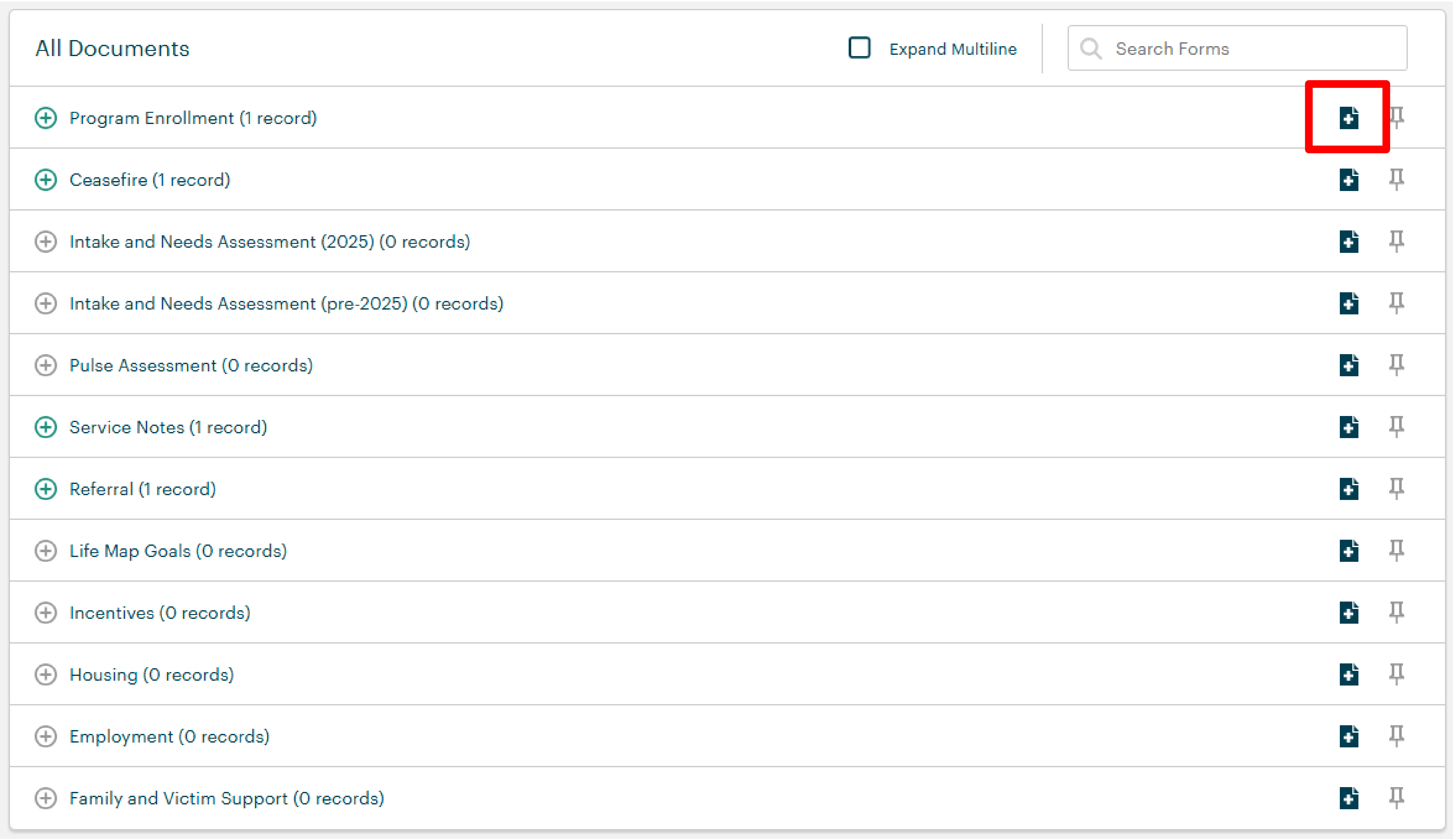
This is the participant's folder, where all service delivery records are stored. To add a new record in any folder, click the "+" icon in the correct row.



Program Enrollment Form

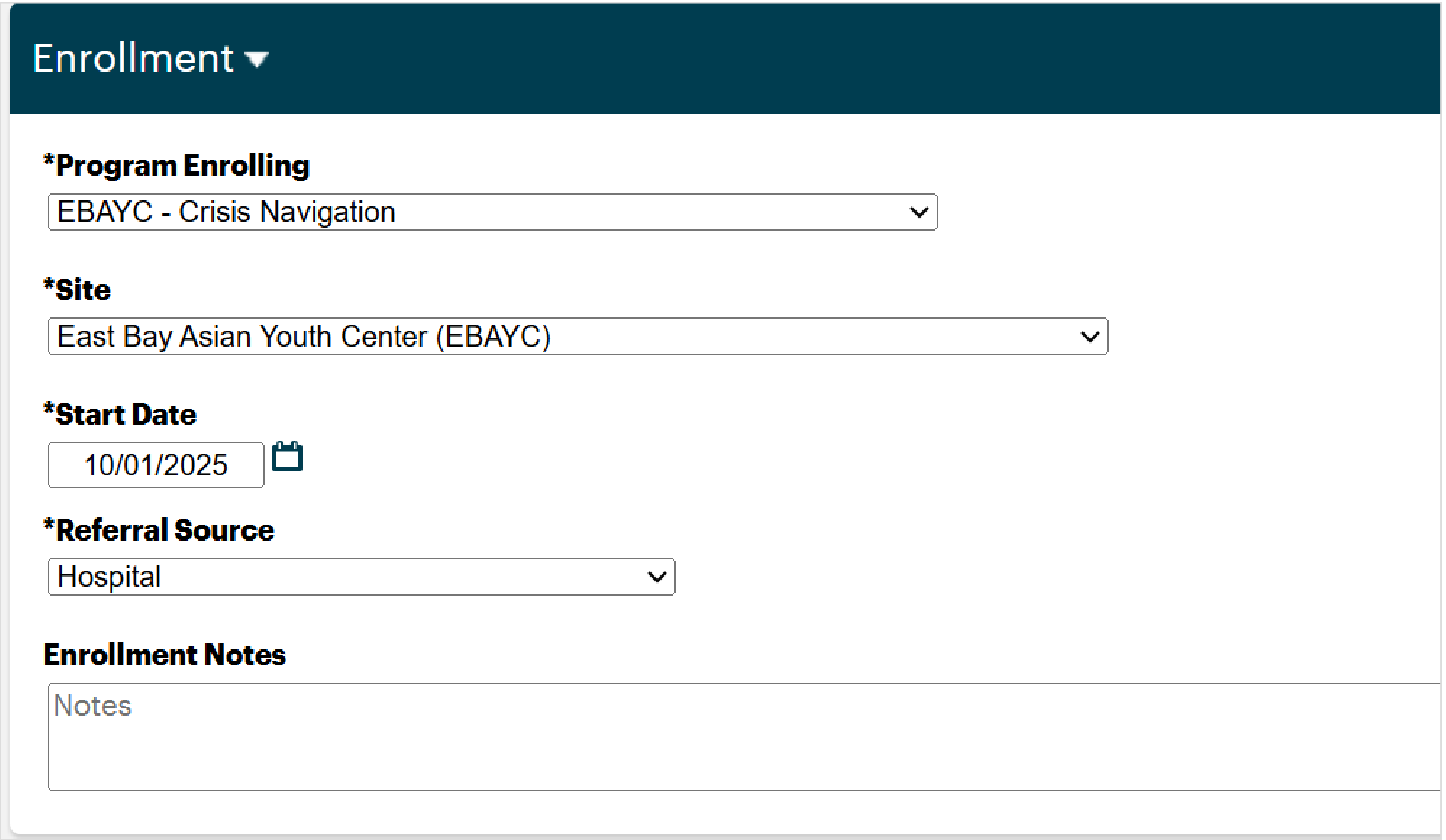
Enrolling a Participant

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

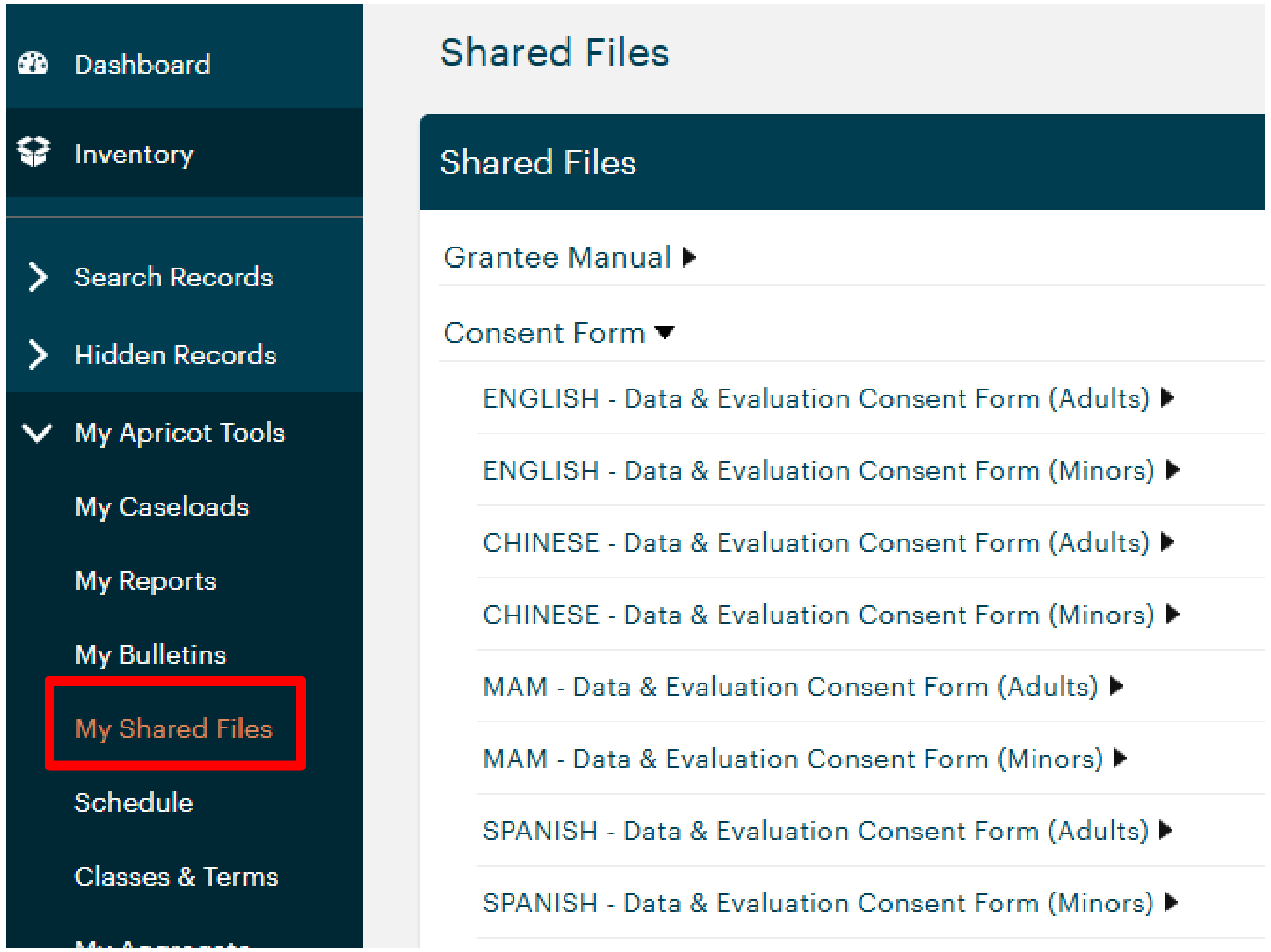
Once a participant enrolls in ongoing services, present the consent form to them within 30 days. There are three versions of the consent form based on the participant’s age and the type of service they are receiving:

- 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

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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.

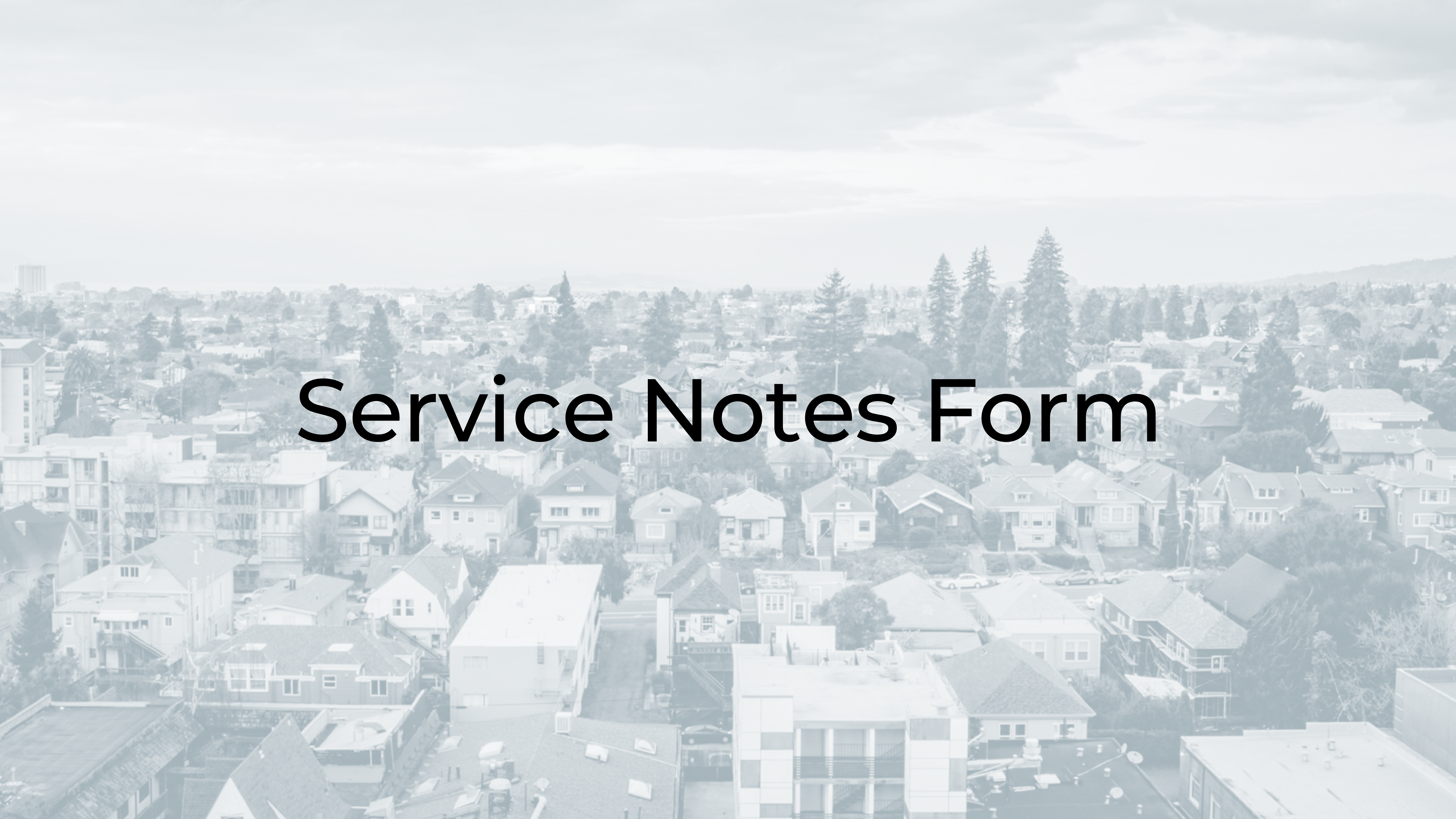
Privacy

- 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

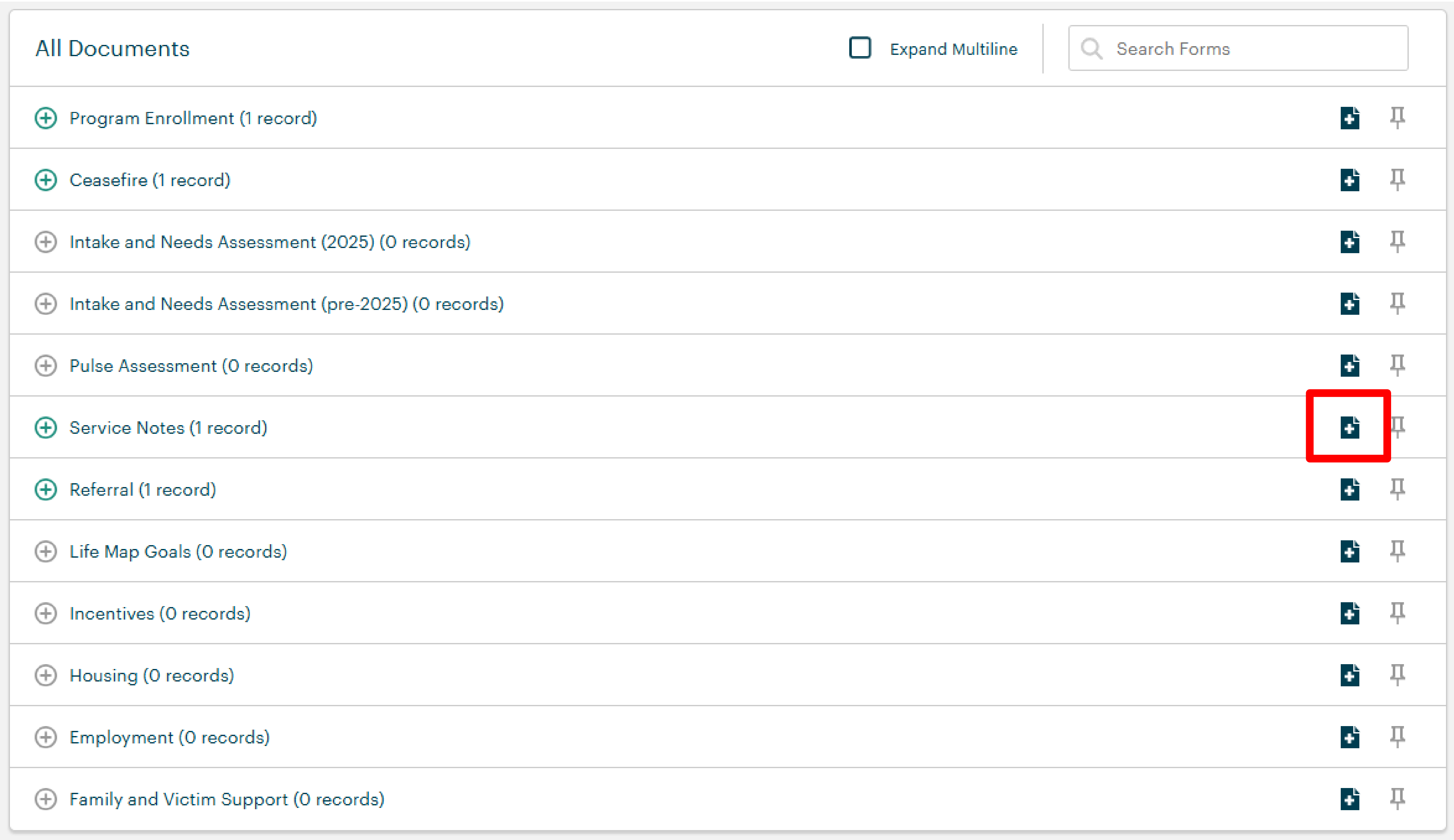
- Agreeing to the consent form is your choice – you can still get services if you do not agree.

Service Notes Form



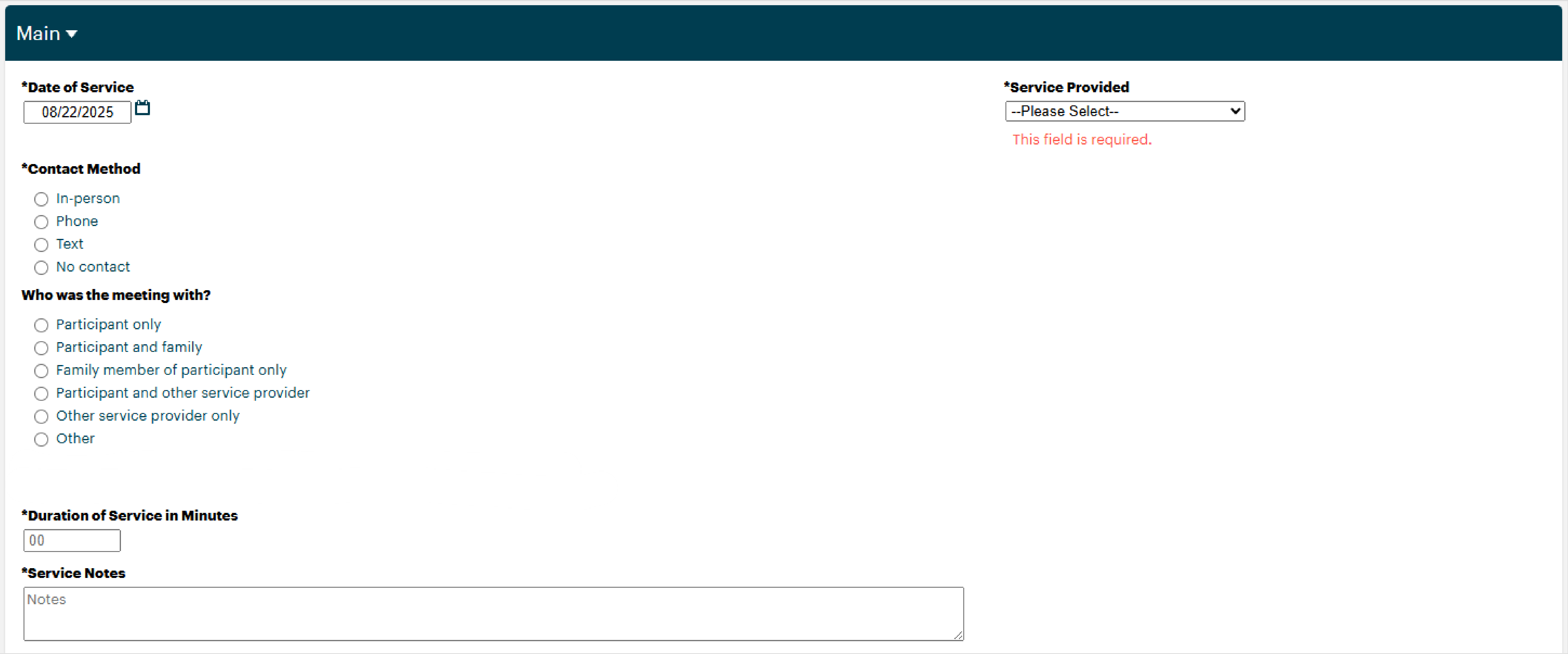
Service Notes Form

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

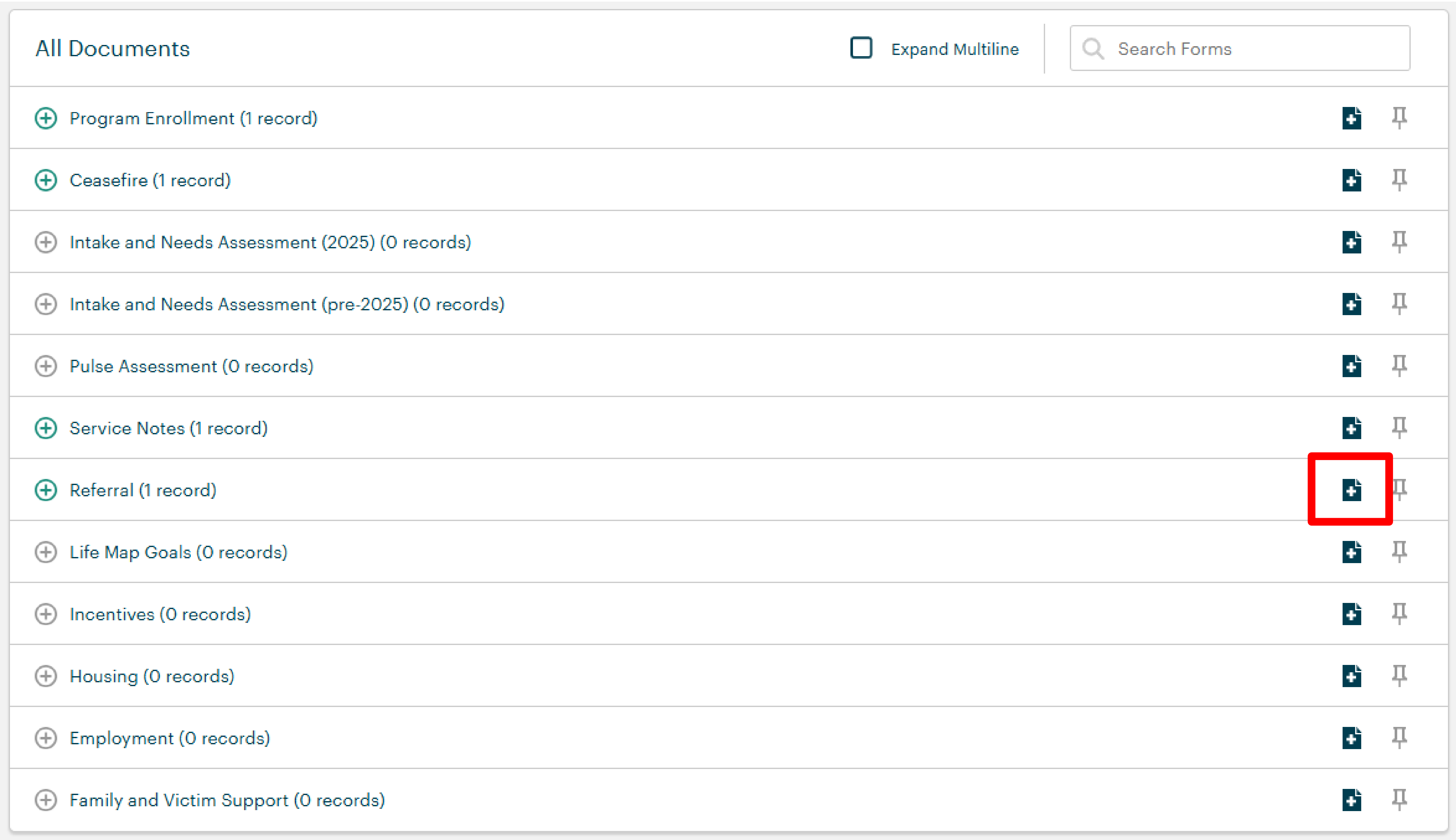
Step 2: Complete all information on the service notes form. Then click "Save Record" on the right side of the screen.



Referral Form

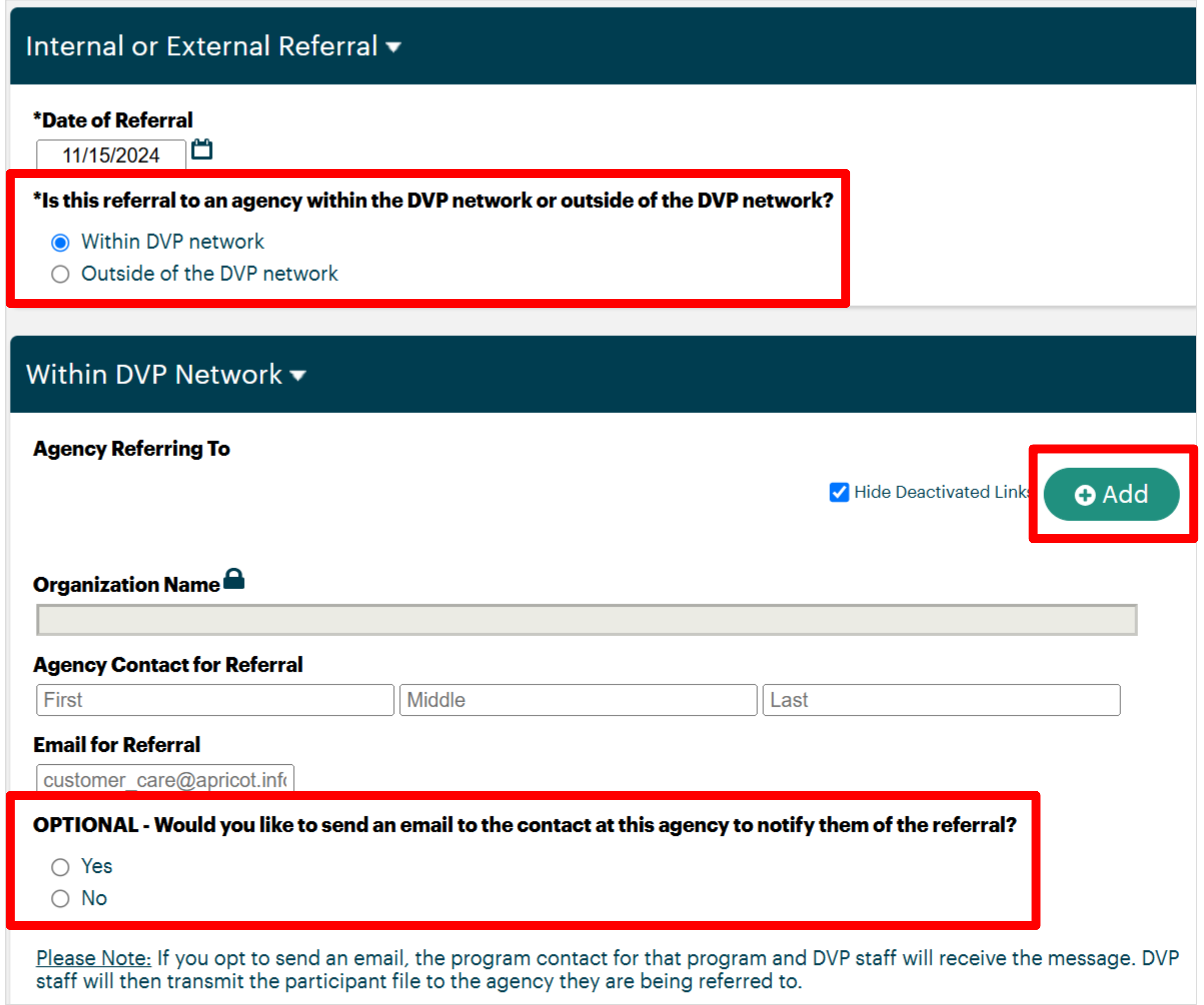
Referral Form

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.



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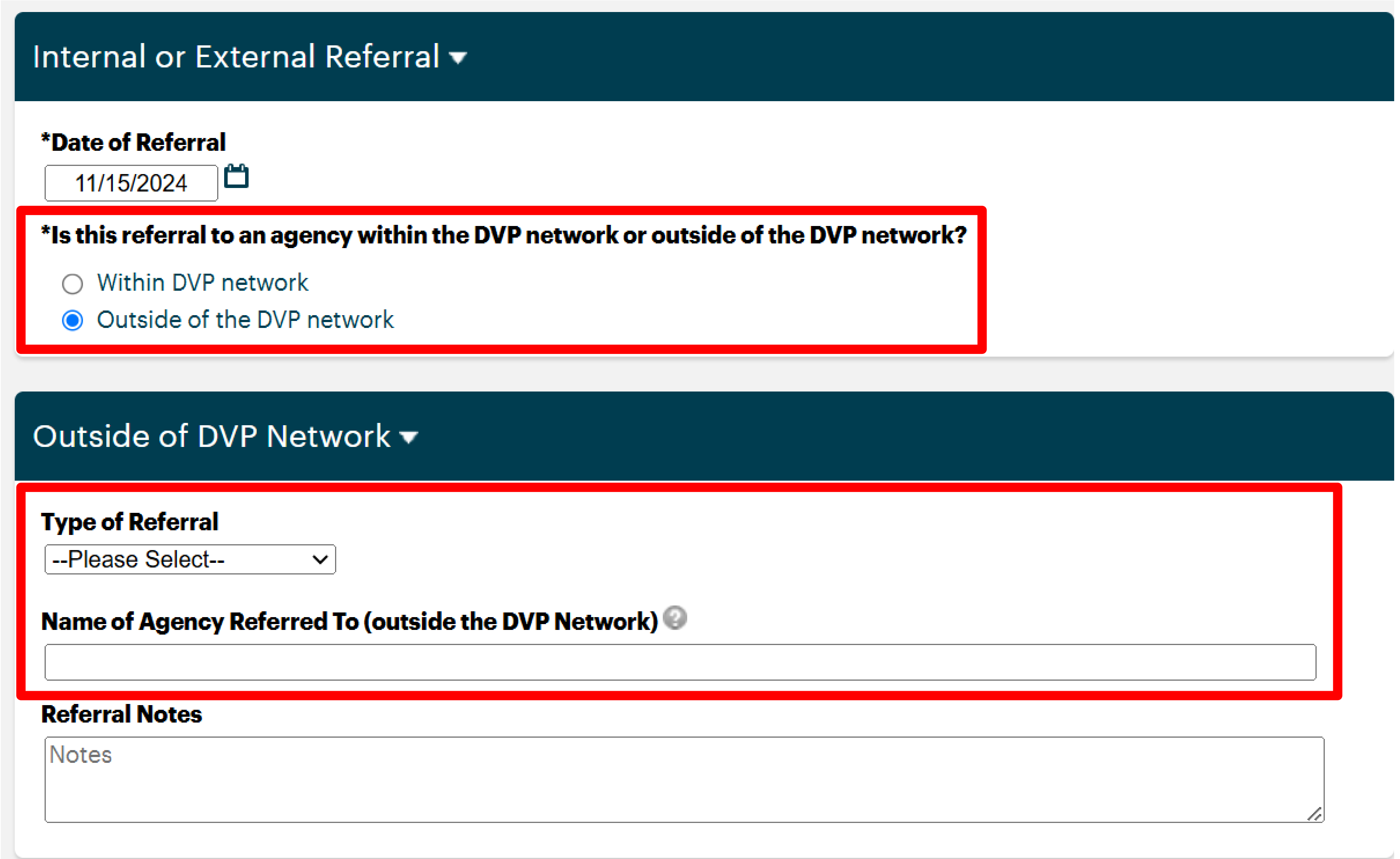
Outside the DVP Network

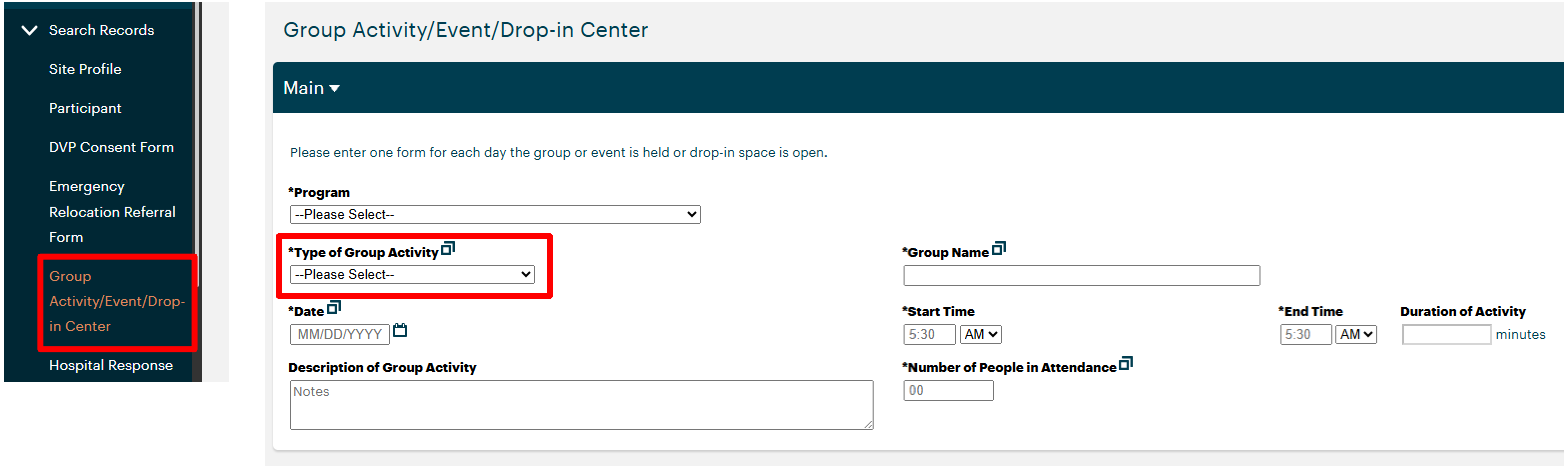
Step 2: If the referral is to an agency NOT funded by the DVP, select “Outside of the DVP network.” Then select the type of referral (housing, employment, etc.) and enter the name of the agency. Lastly, click “Save Record” on the right side of the screen.



Group Activity Form

Group Activities Form

Complete a **Group Activity Form** to document each grief or support group held. When selecting a value for “Type of Group Activity,” be sure to select “Healing/support group.”



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.
Group Activities and Events Report	This report provides information on all group activities during a specific time range.