

Apricot Data Entry Instructions

Legal Services

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Deliverables



Deliverables

- Number of individuals who receive legal services.
- Number of service hours received.



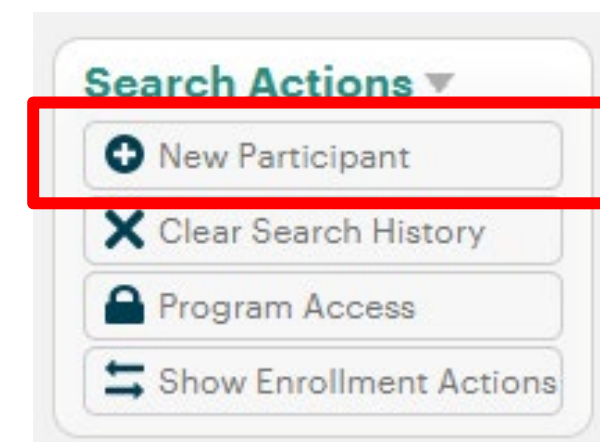
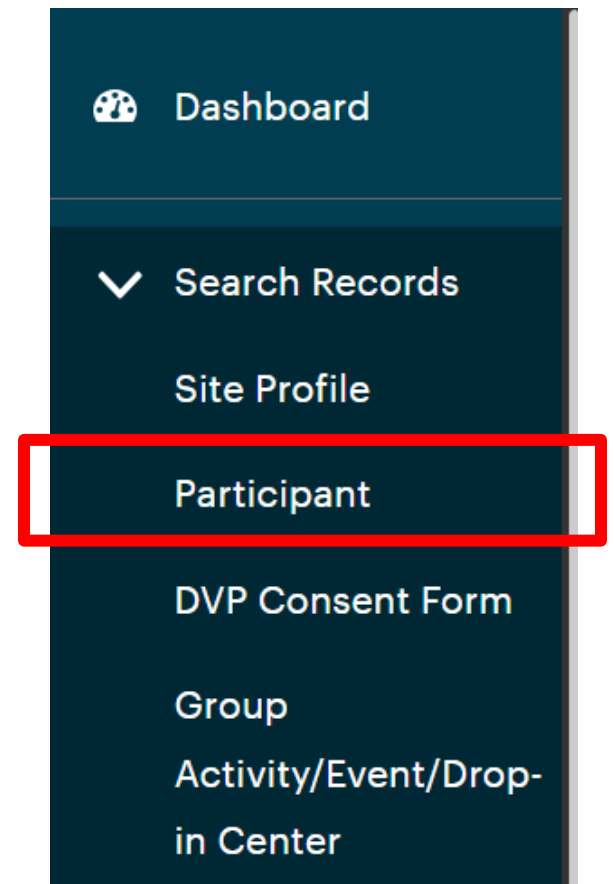
Participant Records



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 Select to map 
No results found

Address
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

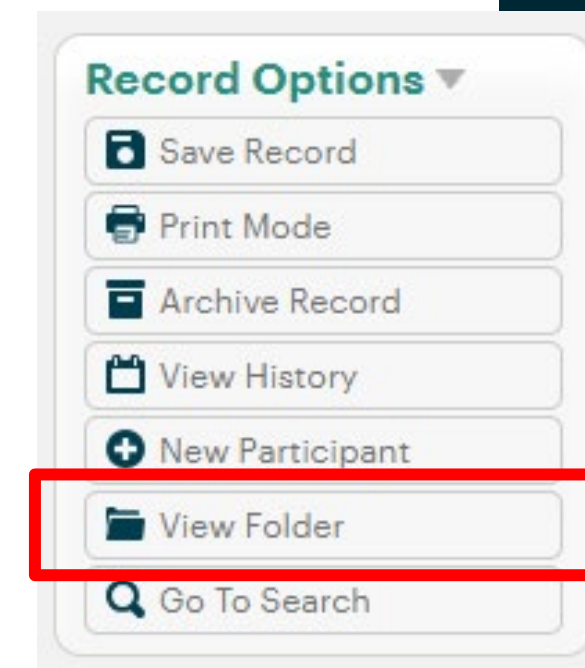
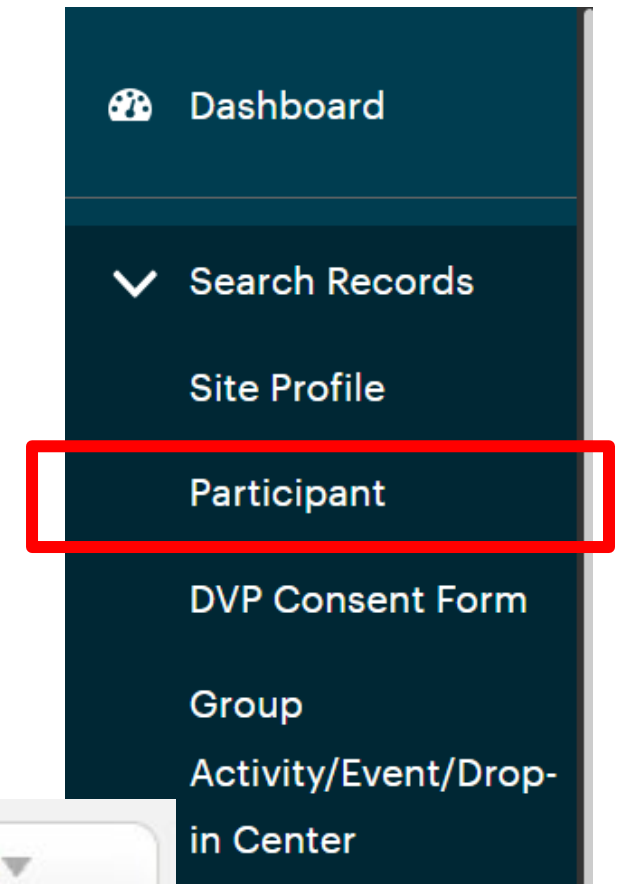
If a person is already in Apricot because they received services from a different agency, a duplicate record message will appear.

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

Accessing a Participant's Folder

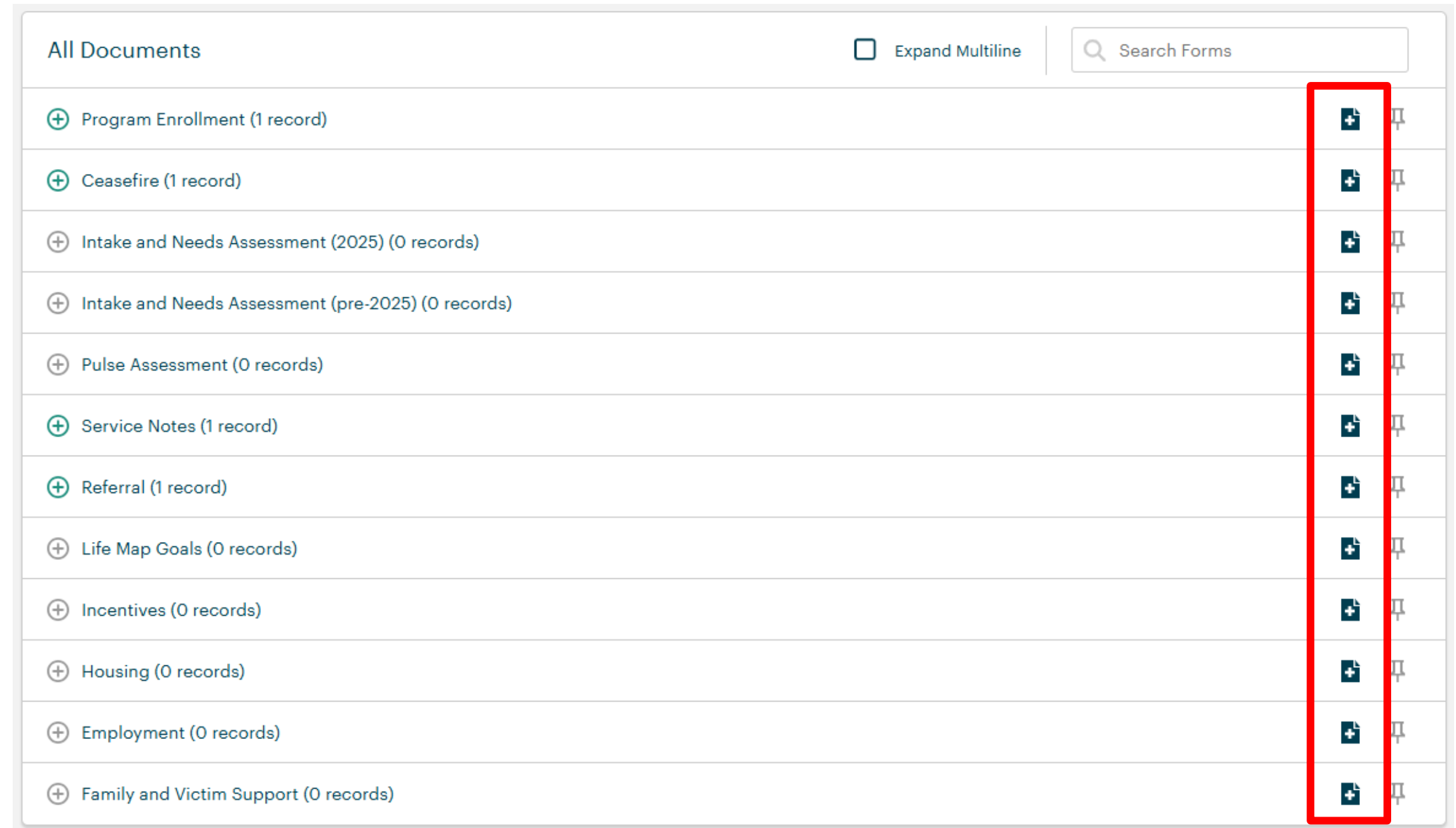
Step 1: Select “Participant” on the left side of the screen under “Search Records.”

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 table with 12 rows. Each row contains a green circular icon with a white plus sign, followed by a text label and a record count in parentheses. To the right of each row is a blue square icon with a white plus sign, and further right is a pin icon. A red rectangular box highlights the column of blue plus icons. The rows 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)".

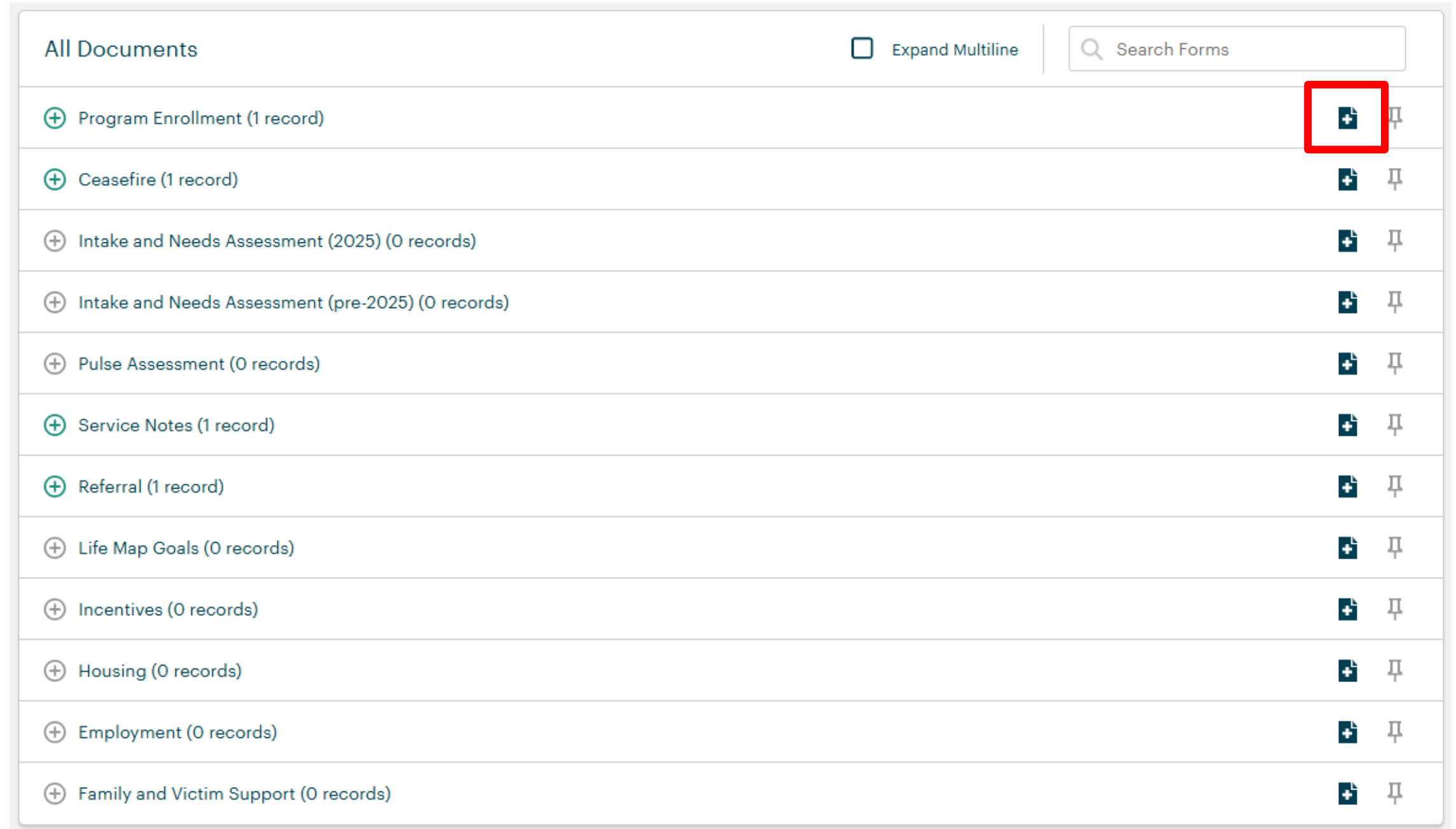
All Documents		☐ Expand Multiline	Search Forms
+	Program Enrollment (1 record)	+	Pin
+	Ceasefire (1 record)	+	Pin
+	Intake and Needs Assessment (2025) (0 records)	+	Pin
+	Intake and Needs Assessment (pre-2025) (0 records)	+	Pin
+	Pulse Assessment (0 records)	+	Pin
+	Service Notes (1 record)	+	Pin
+	Referral (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



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 document management. At the top, there is a header bar with 'All Documents' on the left, a checkbox labeled '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)', has a blue plus icon in its rightmost column, which is highlighted by a red square. The other rows also have a blue plus icon and a pin icon in their rightmost columns. The 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)'.

Document Name	Records	Actions
Program Enrollment	1 record	+ [Red Square]
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



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

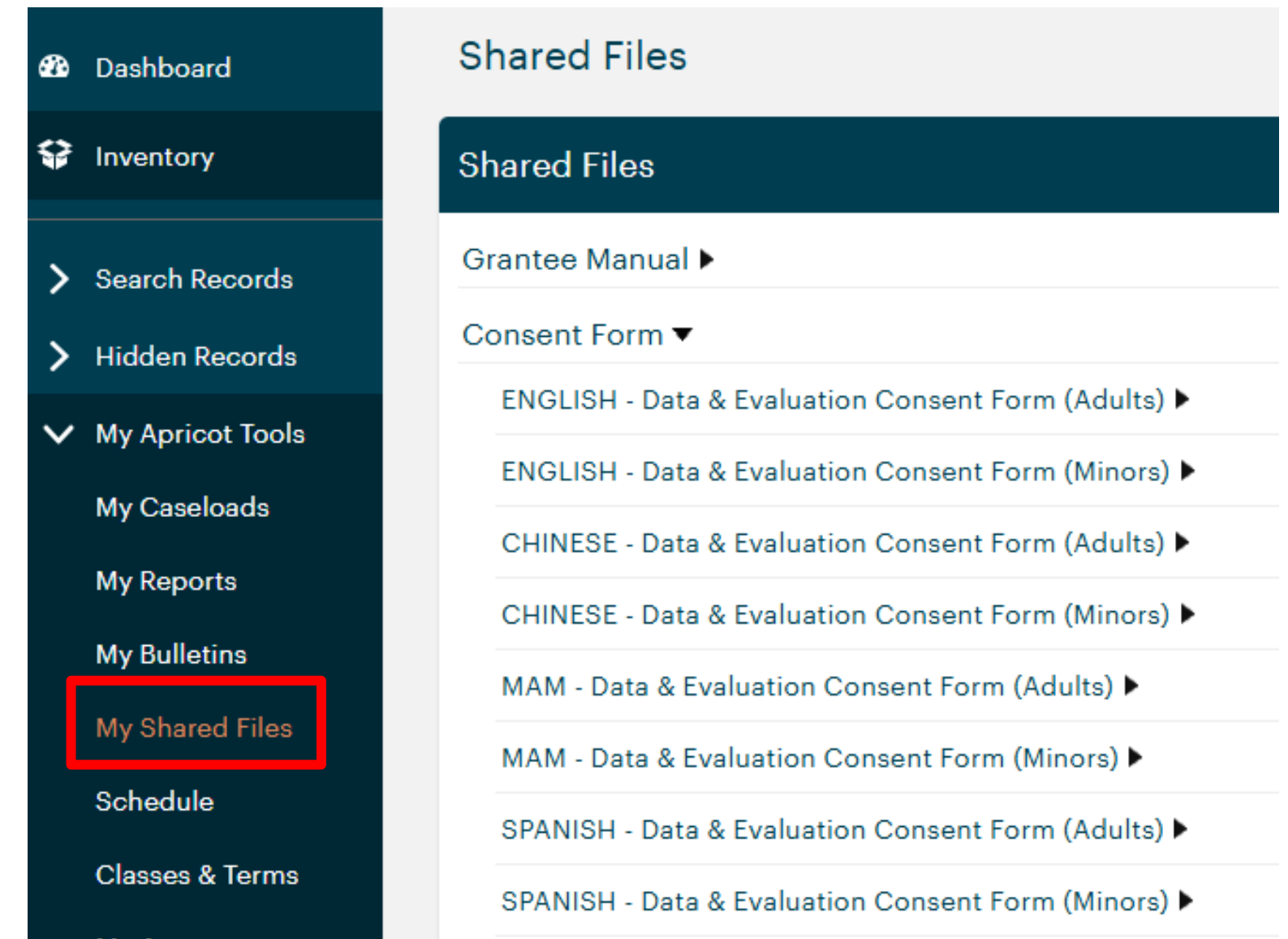
Once a participant enrolls in ongoing services, present the consent form to them within 30 days. There are three versions of the consent form based on the participant's age and the type of service they are receiving:

- 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

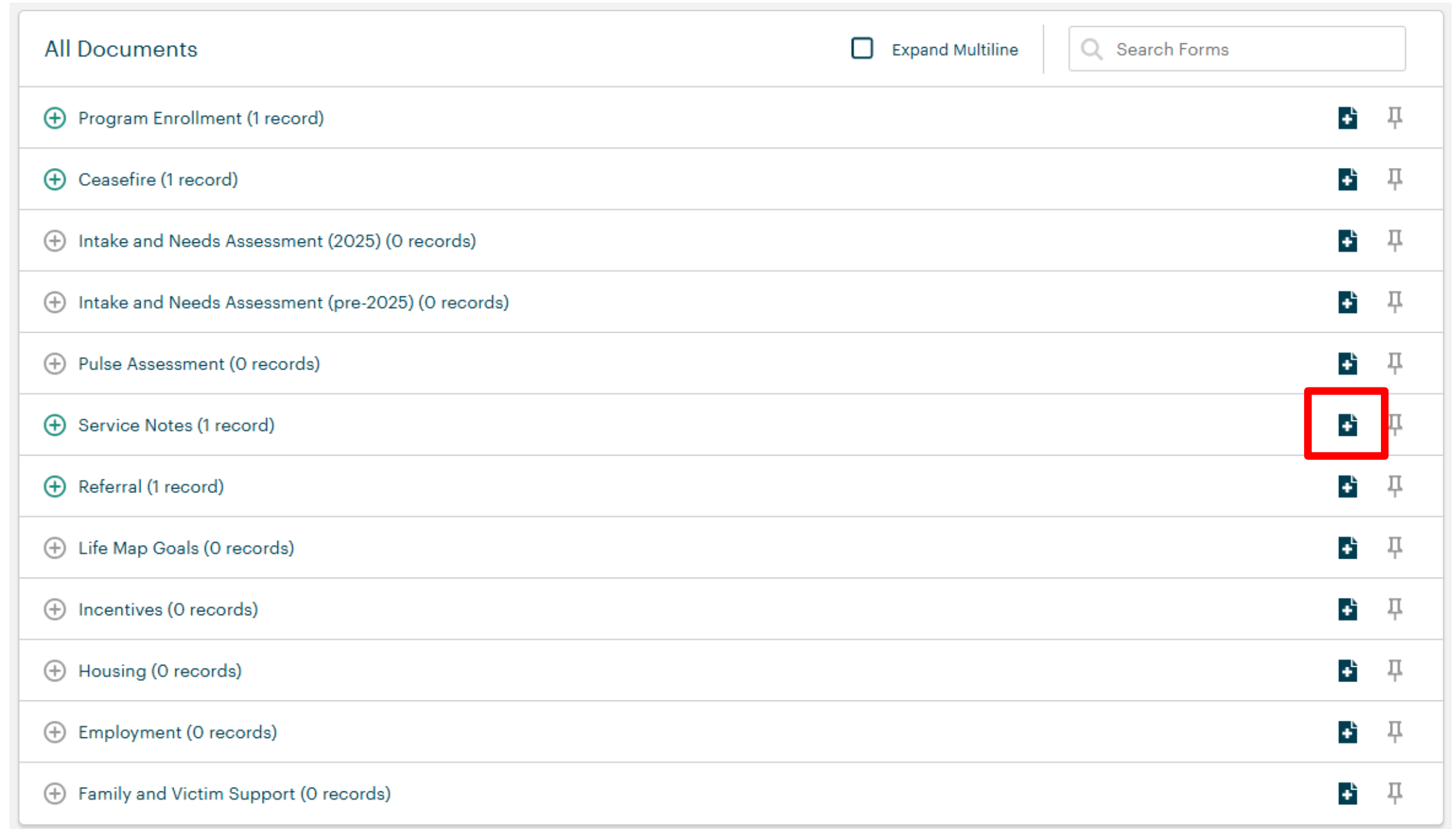
- Agreeing to the consent form is your choice – you can still get services if you do not agree.



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.



The screenshot displays a web 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 plus icon in a circle, the document name, the number of records, and two icons (a document with a plus and a pushpin) on the right. The "Service Notes (1 record)" entry is highlighted with a red rectangular box.

Document Type	Records	Document Icon	Pin Icon
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	+	📌



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--

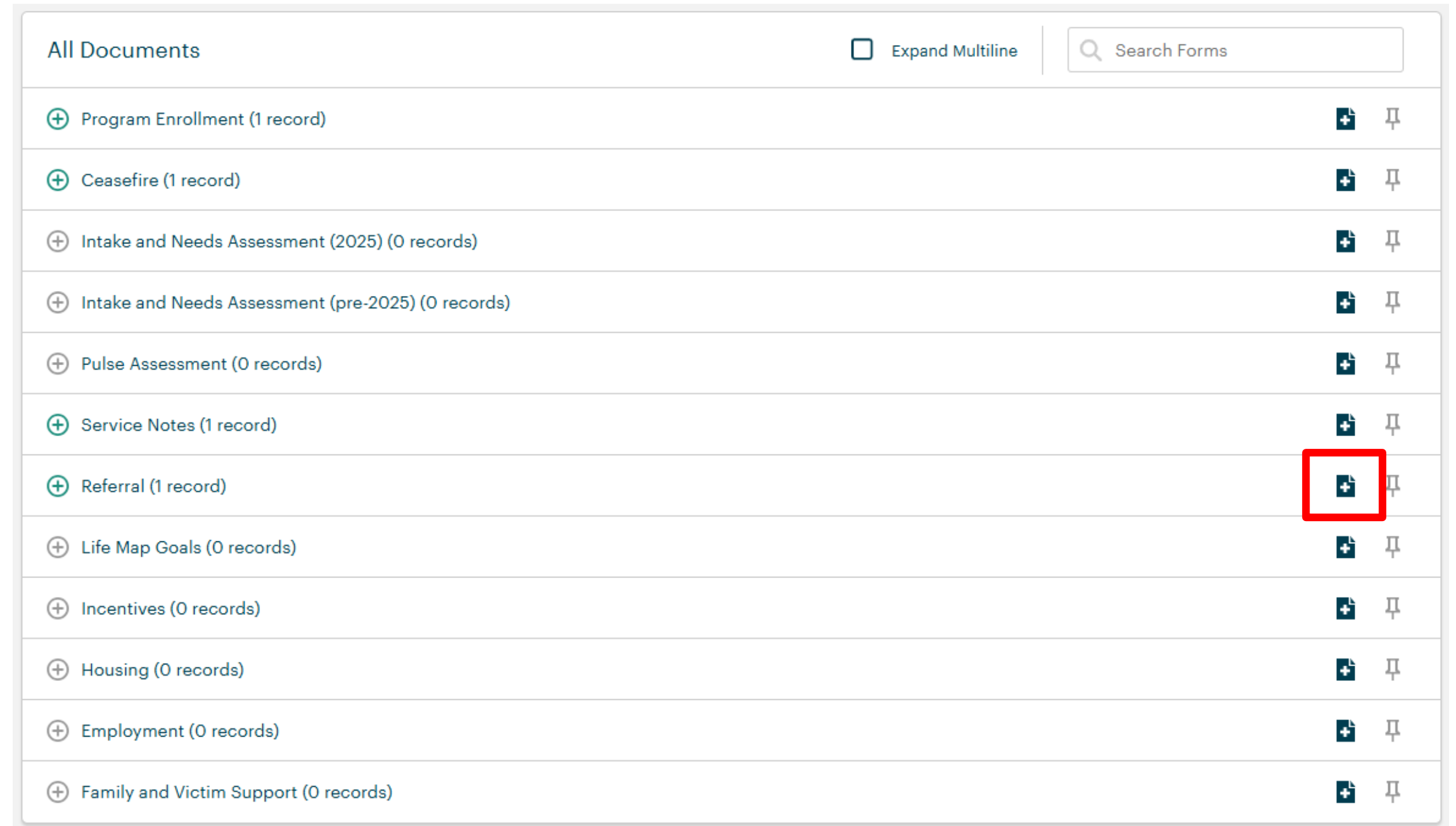
This field is required.



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 ☐ Expand Multiline

+ 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 Link

Organization Name

Agency Contact for Referral

First Middle Last

Email for Referral
customer_care@apricot.infr

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 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.