

JWB User Guide

APRICOT 360

JWB IT Department

JUVENILE WELFARE BOARD OF PINELLAS COUNTY | 14155 58TH STREET NORTH, CLEARWATER, FL 33760

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What is Apricot 360?

Apricot 360 is the platform that JWB uses for Participant Tracking and Case Management. This version of Apricot 360 has been designed with JWB's needs in mind.

Getting Access to Apricot 360

If you are someone who requires access to Apricot 360, you and your supervisor can fill out the Participant Management Access form located on the Participant Management Page of the JWB website. You can access that page through the following link

<https://www.jwbpinellas.org/providers/participant-management-apricot360/>.

You will find the form under the Participant Management Forms & Information Section.

Logging into Apricot 360

You can access Apricot 360 at this link <https://apricot.socialsolutions.com/auth> from any computer or mobile device with internet connection. Bookmarking this page will be helpful for future access.

Your credentials will be provided to you by the JWB Provider Support desk.

Contacting JWB for Apricot 360 Support

If you have issues logging in or any Technical Issues with Apricot 360, please contact provider-support@jwbpinellas.org. For program specific questions, please contact your assigned JWB Evaluator. If you don't know who your assigned Evaluator is, the Provider Support desk can point you in the right direction.

Apricot 360 System Time-Out

The Apricot 360 System is set to time out after 15 minutes of inactivity. At this point, you will need your credentials to log in again.

Sites in Apricot 360

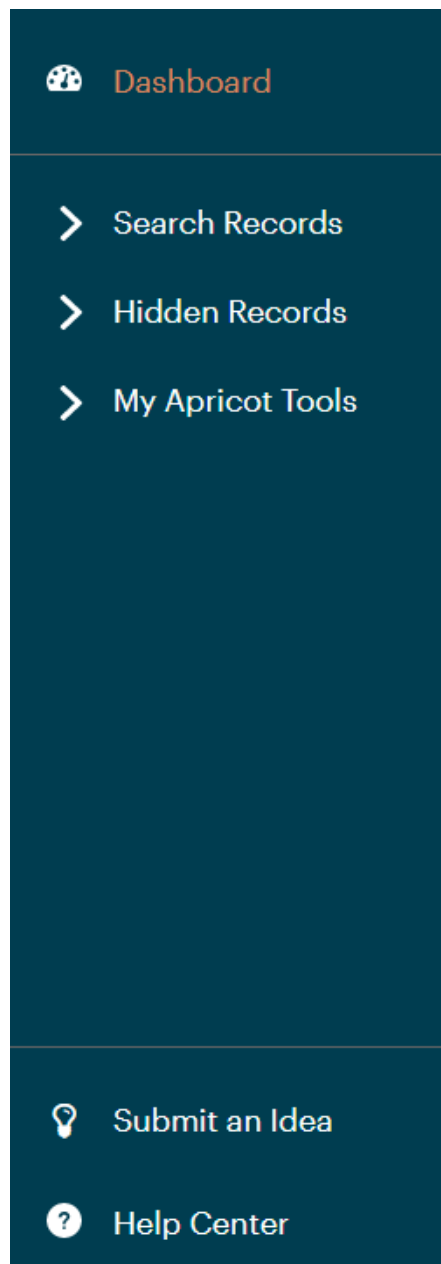
In Apricot 360, Agencies are referred to as Sites. When you log in, you may see "All Sites All Programs" on your screen on the top Navigation Bar. This is referencing All Agencies All Programs. Physical sites or locations where services are delivered are also referred to as sites. These sites will be available on the Service Interaction forms.

Exploring Navigation

If you have access to more than one program, you can navigate from program to program from the top center bar. The default will be All Sites All Programs. Remember in Apricot Agencies are called Sites. You can toggle back and forth between sites or select All Sites All Programs. You will notice the Form you are on will be responsive to your selection.



Left Navigation Bar



Dashboard- this will bring you to a census map- to navigate to the “Home Screen” click on the Apricot360 logo

Search Records

Participant Profile- If you are on a Specific Site/Program this is where you can see the participants in each program. If you change to All Sites/Programs, you will be able to see all enrolled participants.

Household- Similar to the Participant Profile, the view will change according to your Site and Program Selection

Program Wide Services- This is where you would see the available Program Wide Services

Hidden Records

Sites- These are the physical sites where services take place

Service Name- These are the services assigned to the program

My Apricot Tools

My Workflows- any system workflow available to you

My Reports- reporting workspace

My Bulletins- login landing page

My Shared Files- this is where you will find the JWB Data Quality Manual and the Apricot User Manual

My Calendars- attaches to a Google Calendar *not like GEMS Calendars

Schedule- not configured

Classes & Terms- this is the Attendance Module

My Referrals- referral from one program to another

Submit an Idea- provide feedback to apricot and vote up other feedback

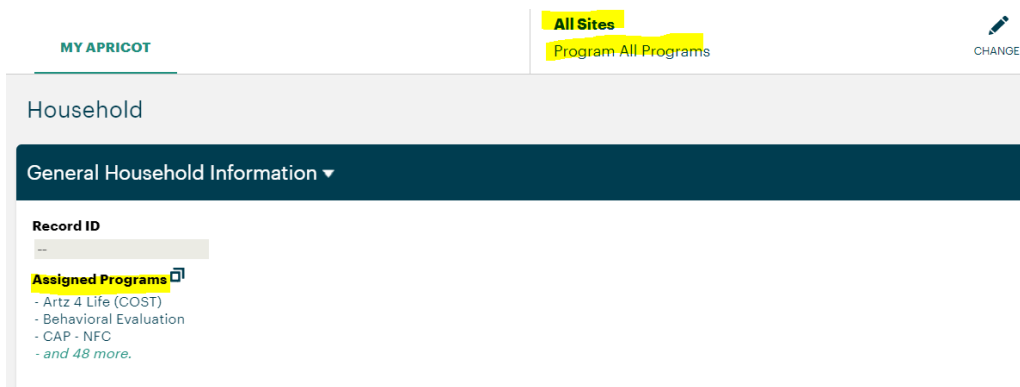
Adding a Household

Under Take Action choose New Household

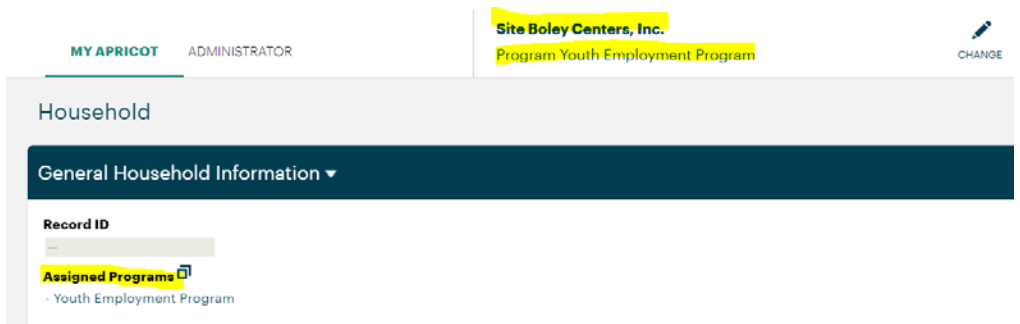


***Note, you must choose a program from the top or the Household you add will be added to all programs that you have access to. See screenshots below for differences.**

All Sites All Programs Selected



Specific Site Specific Program Selected



Saving a Household

On the right-hand side of the screen in line with the Household form, you will see Save Record.



Adding a new participant

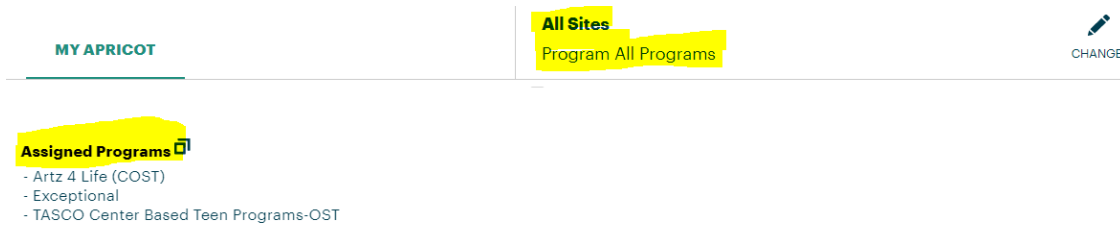
Under Take Action choose New Participant



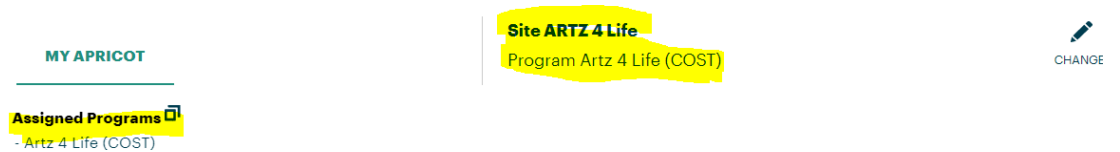
***Note, like adding a Household, you must choose a program from the top or the Participant you add will be added to all programs that you have access to. See screenshots below for differences.**

This is at the bottom of the Add Participant Screen

All Sites All Programs Selected



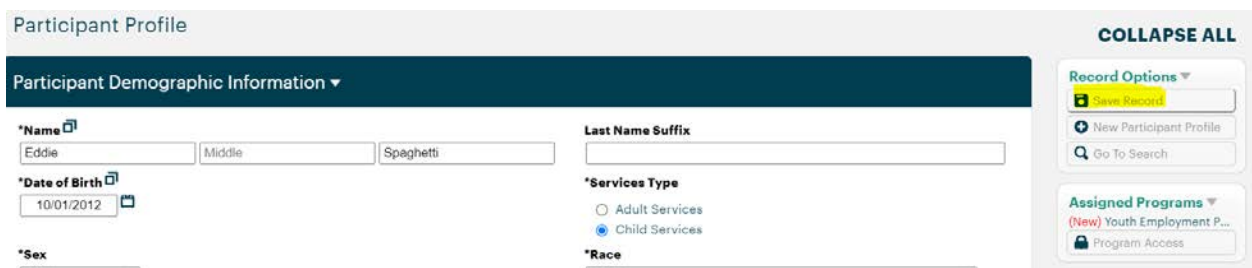
Specific Site Specific Program Selected



You can link a household to each new participant you create or add the participant to the household from the Create Household form.

Saving the Record

On the right-hand side of the screen in line with the Participant Profile, you will see the option to Save Record



Adjusting the Assigned Programs

If you enter a Household or Participant and later realize they have been assigned to the wrong program(s) you can adjust this from inside their record. On the right-hand side, where you would go to save the record, scroll down to Assigned Programs and click on Program Access.

The image shows a sidebar menu with two sections. The top section is titled 'COLLAPSE ALL' and contains a 'Record Options' dropdown menu with the following items: Save Record, Print Mode, Archive Record, View History, New Participant Profile, View Folder, and Go To Search. The bottom section is titled 'Assigned Programs' and shows 'Artz 4 Life (COST)' with a 'Program Access' button highlighted in yellow.

From the popup screen, you will be able to add or remove programs that the participant is assigned to. You will only be able to add or remove programs that your account has access to. You have the option to Add All, Remove All, or Add or Remove individually. Once you have made any changes that are necessary, click Apply.

The image shows a 'Assign Programs' popup window. It has two main columns: 'Available Programs' and 'Assigned Programs'. The 'Available Programs' column lists 'Artz 4 Life (COST)', 'City of Dunedin-Promise Time', 'Exceptional', and 'TASCO Center Based Teen Programs-OST'. The 'Assigned Programs' column lists 'Youth Employment Program'. Between the columns are 'Add >' and '< Remove' buttons. At the top of each column are 'Add All >>' and '<< Remove All' buttons. At the bottom, there is a message: 'You must save the record for the access changes to have effect' and two buttons: 'Apply' and 'Cancel'.

Search Records

Program Enrollment/Episode

Under Search Records on the left-hand side of your screen click on Participant Profile. Search for/Choose the participant that you would like to open an Episode for.

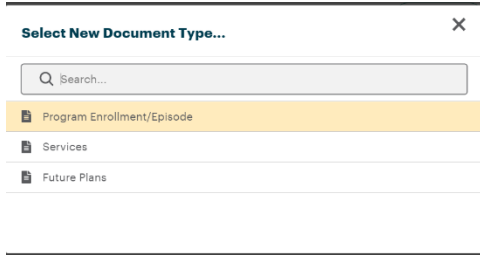
The image shows a 'Participant Profile' search interface. On the left is a navigation menu with 'Participant Profile' selected. The main area is titled 'Participant Profile Search' and includes a search field and a 'Browse All' button. Below this is a table with the following data:

Name	Date of Birth	Services Type	Race	Gender	Primary Language Spoken
Eddie Spaghetti	10/01/2012	Child Services	White	Male	
Participant 1 Test	04/06/1967	Adult Services	Haitian	Male	French
Patrick Test	01/01/2001	Child Services	White	Male	

You can open an Episode in 1 of 2 ways.

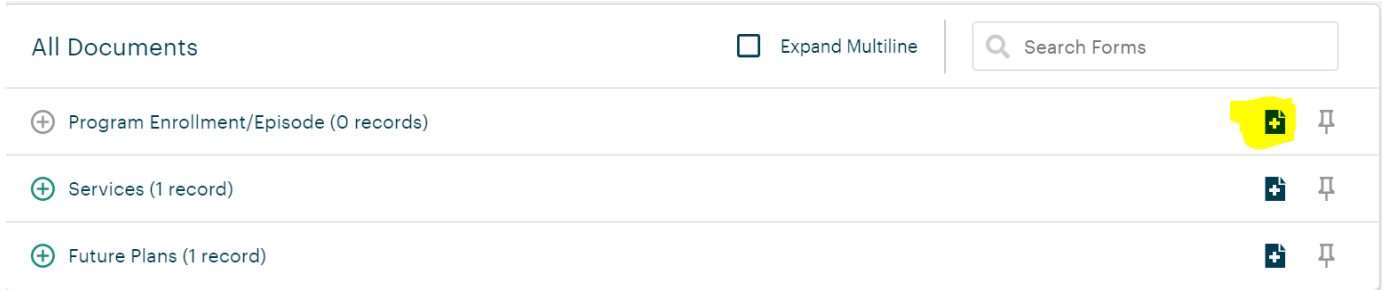
1. On the Participant's Profile you can choose Create at the top of the screen



The image shows the top of a participant profile page for 'Eddie Spaghetti'. It features a back arrow, the name 'Eddie Spaghetti', and three buttons: 'Edit', 'Create' (highlighted in yellow), and 'Print'. Below the name is a 'Quick View Information' button. At the bottom, there are tabs for 'DOCUMENT FOLDER', 'CENSUS', 'LINKS', and 'APPOINTMENTS'.



A pop-up will appear with any available Documents that are assigned to your programs. Choose Program Enrollment/Episode to open an Episode for participant. **Please make sure you are seeing any form that should be assigned to your program.**

- Or you can scroll down to the Document Folder and click on the + symbol next to the document you would like to add, in this case Program Enrollment/Episode.



***Note:** When adding a new document, a  symbol will appear when you move your mouse over the row if no records have been added. You will only be able to select the  symbol to add the new Episode, Survey, or Service Interaction.

Opening an Episode

Enter an Episode Open Date and fill in the Referred From Field. You can then save the record from the right-hand tool bar.



Closing an Episode

To close the Episode, expand on the Program Enrollment/Episode in the Document Folder and click on the Episode that you would like to close. *Note: Only one Episode should be open at a time

DOCUMENT FOLDER CENSUS LINKS APPOINTMENTS

All Documents Expand Multiline

Program Enrollment/Episode (1 record)

EPISODE OPEN DATE	EPISODE CLOSE DATE
08/01/2021	

Choose a Close Date and Closing Reason and click on Save Record on the right-hand toolbar. Note: There is a Referred to area. You can check any of these boxes if the participant was referred to another program or service.

Episode Close Date

Episode Closing Reason

MISC1

MISC2

Record Options

-
-
-
-
-
-
-

Adding Service Interactions

Under Search Records on the left-hand side of your screen click on Participant Profile. Search for/Choose the participant that you would like to enter services for.

- Dashboard
- Search Records
 - Participant Profile
 - Household
 - Program Wide Services
 - Hidden Records

Participant Profile

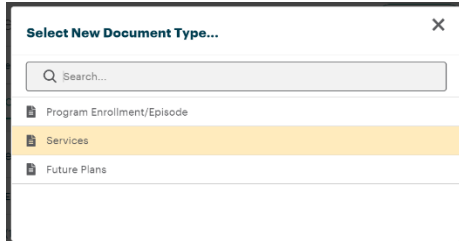
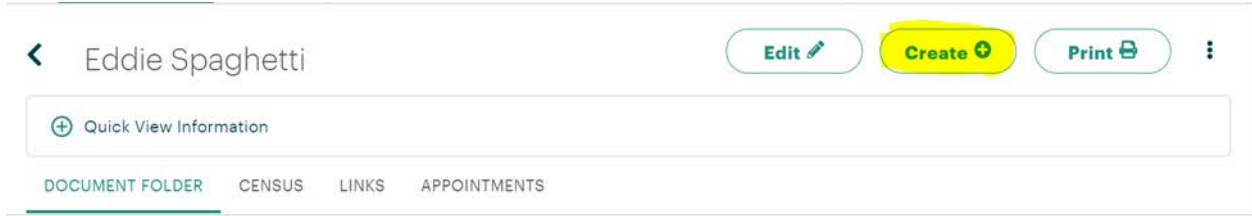
Participant Profile Search

The following 3 Participant Profile records are available More Columns...

Name	Date of Birth	Services Type	Race	Gender	Primary Language Spoken
Eddie Spaghetti	10/01/2012	Child Services	White	Male	
Participant 1 Test	04/06/1967	Adult Services	Haitian	Male	French
Patrick Test	01/01/2001	Child Services	White	Male	

You can add surveys in 1 of 2 ways.



1. On the Participant's Profile you can choose Create at the top of the screen



A pop-up will appear with any available Documents that are assigned to your programs. Choose Services to add to the participant. **Please make sure you are seeing all of the services and surveys that should be assigned to your program.**

2. Or you can scroll down to the Document Folder and click on the + symbol next to the document you would like to add, in this case Services.



***Note:** When adding a new document, a  symbol will appear when you move your mouse over the row if no records have been added. You will only be able to select the  symbol to add the new Episode, Survey, or Service Interaction.

You can save your Services Record by clicking on Save Record on the right-hand side of your screen.

Remember sites are now assigned to Services, not participants. To change sites, you can click on the entered service and edit the Site field and then Save Record.

Services

Eddie Spaghetti

Quick View Information ▶

Main ▾

*Date of Service

07/30/2021

*Individual/Group

- Individual
 Group

*Service Name

Job Placement

*Service Modality

In-person

*Site/Location

Program Site

*Site

Boley Centers

COLLAPSE ALL

Record Options ▾

Save Record

Print Mode

Archive Record

View History

New Services

View Folder

Go To Search

Assigned Programs ▾

Youth Employment Program

Program Access

Record Save Checklist

Required Field Checks ✓

Field Validation Checks ✓

Form Logic Rules

Program Site

Adding Surveys

Under Search Records on the left-hand side of your screen click on Participant Profile. Search for/Choose the participant that you would like to enter services for.

Name	Date of Birth	Services Type	Race	Gender	Primary Language Spoken
Eddie Spaghetti	10/01/2012	Child Services	White	Male	
Participant 1 Test	04/06/1967	Adult Services	Haitian	Male	French
Patrick Test	01/01/2001	Child Services	White	Male	

You can add surveys in 1 of 2 ways.

1. On the Participant's Profile you can choose Create at the top of the screen

Select New Document Type...



Search...

- Program Enrollment/Episode
- Services
- Future Plans

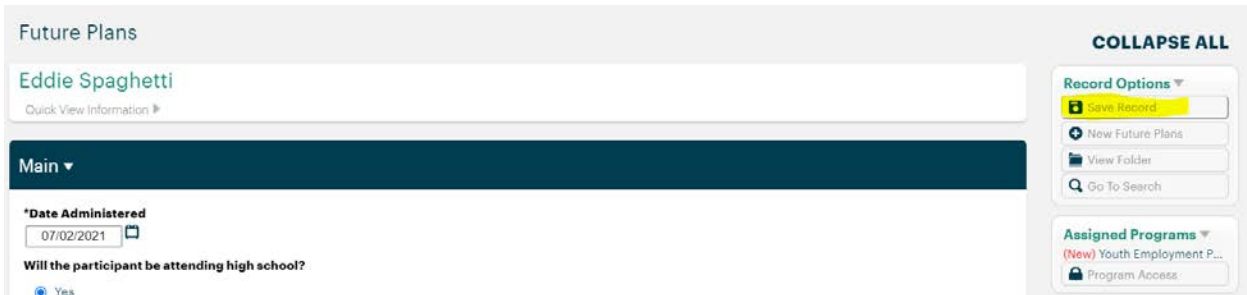
A pop-up will appear with any available Documents that are assigned to your programs. Choose the Survey you would like to add. In my case, there is only one survey to choose from. **Please make sure you are seeing all of the services and surveys that should be assigned to your program.**

- Or you can scroll down to the Document Folder and click on the + symbol next to the document you would like to add, in this case, the survey name is Future Plans.



***Note:** When adding a new document, a  symbol will appear when you move your mouse over the row if no records have been added. You will only be able to select the  symbol to add the new Episode, Survey, or Service Interaction.

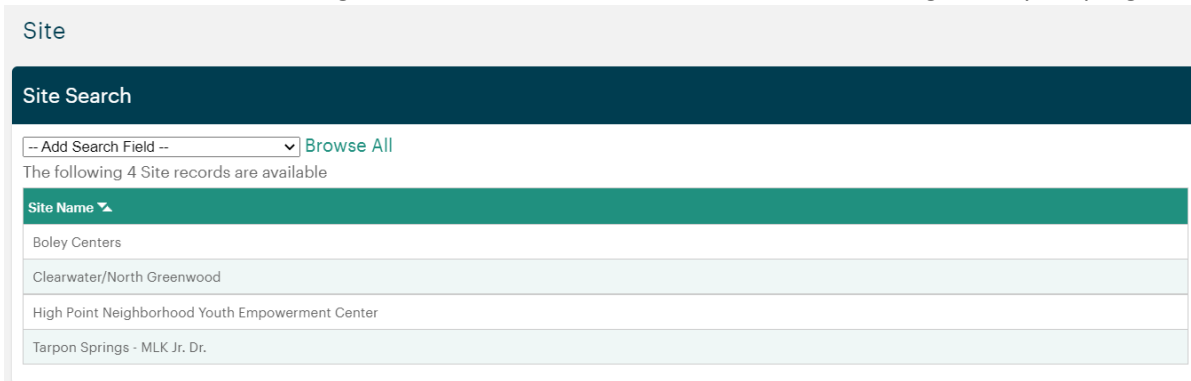
You can save the record by clicking on Save Record on the right-hand side of the screen.



Hidden Records

Sites

Under Hidden Records, navigate to Sites. Confirm all the correct Sites are assigned to your program.



Service Name

Under Hidden Records, navigate to Service Name. Confirm all the correct Services are assigned to your program.

Service Name

Service Name Search

-- Add Search Field -- [Browse All](#)

The following 3 Service Name records are available

Service Name
Job Placement
Tutoring
Work Readiness

My Apricot Tools

Classes & Terms

This is where the “Program Days Calendar” resides. *Note all programs will be able to see all “Classes”, however once they try to open the “Term” they will not see the participants unless they are enrolled in their program.

New Class

To create a New Class for your program click on New Class at the top of the Classes & Terms screen

Classes & Terms

All Classes

[New Class](#)

To name your class, please follow this naming convention Agency|ProgramName (no spaces). Assign the correct sites (Agencies) to the new class. Click Save Class at the bottom of your screen.

Class Details

* Required

NAME *

BoleyCenters|YouthEmployment

DESCRIPTION

SITE(S) *

Boley Centers, Inc. x | v

Select which site(s) should have access to this class.



STATUS

Active | v

[Cancel](#) [Save Class](#)


Add a Term

To add a Term to a Class click on the “eye” icon in the proper Class’s row.


NAME	STATUS	TERMS TOTAL	TERMS IN PROGRESS	
BoleyCenters YouthEmploymentActive		0 terms	0 terms	 

Click New Term

Terms

New Term 

Name your Term in the following format and select the Program(s) the Term applies to.

Term Details
 * Required

NAME

PROGRAM(S)

Youth Employment Program
x | v

LOCATION

Naming convention – Program Location|Time Period

Early Learning – Program Location|SYXX-YY

OST – Program Location|SYXX-YY or
Program Location|Summer XX

Literacy – Program Location|SYXX-YY or
Program Location|Summer XX

Youth Dev/Mentoring - Program Location|SYXX-YY

NFCs – Program Location|SYXX-YY

You can choose your Term Dates to be recurring or specific dates.

Term Dates

RECURRING

SPECIFIC DATE(S)

OCCURS **EVERY** **ON**

week(s)

SMTWTFS

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

-

-












-

You can also mark specific dates where the program is closed.

Select Dates Off (e.g. holidays, breaks)

< Dec... | 2021 | >

SUN	MON	TUE	WED	THU	FRI	SAT
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

9/6/2021	
11/25/2021	
11/26/2021	
12/24/2021	
12/27/2021	
12/28/2021	
12/29/2021	
12/30/2021	
12/31/2021	
1/17/2022	
5/30/2022	

Further down you can mark off the Term Completion Criteria. The Term Completion Criteria helps indicate which participants are attending the indicated percent of days (e.g. 70%) if they were to attend for the entire length of the term. To turn this off you can uncheck the box Once your choices are made, click save.

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.

Enrolling Participants and Adding Attendance

Click on the "eye" in the Term row that you wish to enroll Participants for

NAME	PROGRAM	START DATE	END DATE	
YouthEmployment SY21-22		07/01/2021	06/06/2022	 

Choose Enroll Participant(s) from the middle of the screen

Attendance

Choose the participant(s) you wish to enroll and click Save

Enroll Participant(s)

SEARCH AVAILABLE

<input type="checkbox"/>	Name	Date of Birth
<input type="checkbox"/>	Participant Test	2015-10-01
<input checked="" type="checkbox"/>	Eddie Spaghetti	2012-10-01
<input type="checkbox"/>	Participant Test	1967-04-06
<input type="checkbox"/>	Patrick Test	2001-01-01

View Page of 1

Add attendance for the proper day by clicking on the check or the x. A check indicates the participant attended and an X indicates and absence. If you have the option to mark an absence as excused or unexcused, click on the box with the pencil in it.

Attendance Enroll Participant(s) Session Manager

View Today < > **Jul 2021** Show Unenrolled

	SUN 18	MON 19	TUE 20	WED 21	THU 22	FRI 23	SAT 24
<div style="border: 1px solid #ccc; padding: 2px;"> First Name (A-Z) v </div>	v x	v x	v x	v x	v x	v x	v x
Eddie Spaghetti 2012-10-01 ⋮	v x	v x	v x	v x	v x	v x	v x

Editing A Term

Terms can be edited in order to change the days the program is open and delivering services.

Click on the “eye” in the Term row that you wish to edit

NAME	PROGRAM	START DATE	END DATE	
YouthEmployment SY21-22		07/01/2021	06/06/2022	⋮

At the top of the screen under Term Details click Edit.

Term Details

NAME	PROGRAM
YouthEmployment SY21-22	Youth Employment Program

Show More
Edit

When would you want to edit a Term? Sometimes certain days are closed due to hurricanes or other unforeseen circumstances. You would want to edit the Dates Off in your Term by selecting the individual date that the program will be closed.

Select Dates Off (e.g. holidays, breaks)

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

9/6/2021	
11/25/2021	
11/26/2021	
12/24/2021	
12/31/2021	
1/17/2022	
5/30/2022	

Other times, your program may change the days that services are being delivered. When this happens, you will want to edit the days the program is open near the top of the screen.

Term Dates

RECURRING SPECIFIC DATE(S)

OCCURS **EVERY** **ON**

Weekly 1 week(s) S M T W T F S

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

07/01/2021 06/06/2021 12:00 am 12:00 am

Once you make your edits choose Save Term at the bottom of your screen. To see any edits reflect on the attendance list, you must refresh your page.

IMPORTANT NOTE: If at any time the Term changes and permanently closes on days they were previously open, previous attendance for the now closed days will not appear in the module but it is still recorded. For instance, if mid-term, the operating days change you can update the days but only attendance will show for the current operating days, even if there was data there before. This data is not lost, it is just hidden from view. If you reopen that day in the term, you will see any recorded attendance for that day is still there.

This is a screenshot of the Attendance for the original Term. You'll notice the program days are Monday, Tuesday, and Thursday.

Attendance Enroll Participant(s) Session Manager

View Today < > **Aug 2021** Show Unenrolled

First Name (A-Z)	SUN 1	MON 2	TUE 3	WED 4	THU 5	FRI 6	SAT 7
Eddie Spaghetti 2012-10-01		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>		<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>		

Below you will see that I have edited the term to close on Monday. Notice that Monday is now unavailable, however the data still exists.

Attendance Enroll Participant(s) Session Manager

View Today < > **Aug 2021** Show Unenrolled

First Name (A-Z)	SUN 1	MON 2	TUE 3	WED 4	THU 5	FRI 6	SAT 7
Eddie Spaghetti 2012-10-01			<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>		<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>		

****The system allows for users to add future attendance dates, but according to the JWB Data Quality Manual future service date should never be entered.**

Program Wide Services

If your program has Program Wide Services you will add them under **Search Records > Program Wide Services**. To add a new service click on **+New Program Wide Services** on the right-hand tool bar.

Program Wide Services EXPAND ALL

Program Wide Services Search

-- Add Search Field -- More Columns...

No records found for Program Wide Services

Search Actions

-
-
-
-

Favorite Lists

-- Select Favorite List --

Favorite Details

Enter all required fields and click **Save Record** on the right-hand tool bar.

Program Wide Services COLLAPSE ALL

Main

*Service Name

Record Options

-
-
-

To edit a service that has already been added, click on the appropriate Program Wide Service and then click on Edit.