Apricot Software User Guide: Adult and Aging

How to navigate and complete data entry tasks for Sonoma Adult and Aging

Last Updated: Sep 18, 2025

Table of Contents

Getting Started with Apricot 360

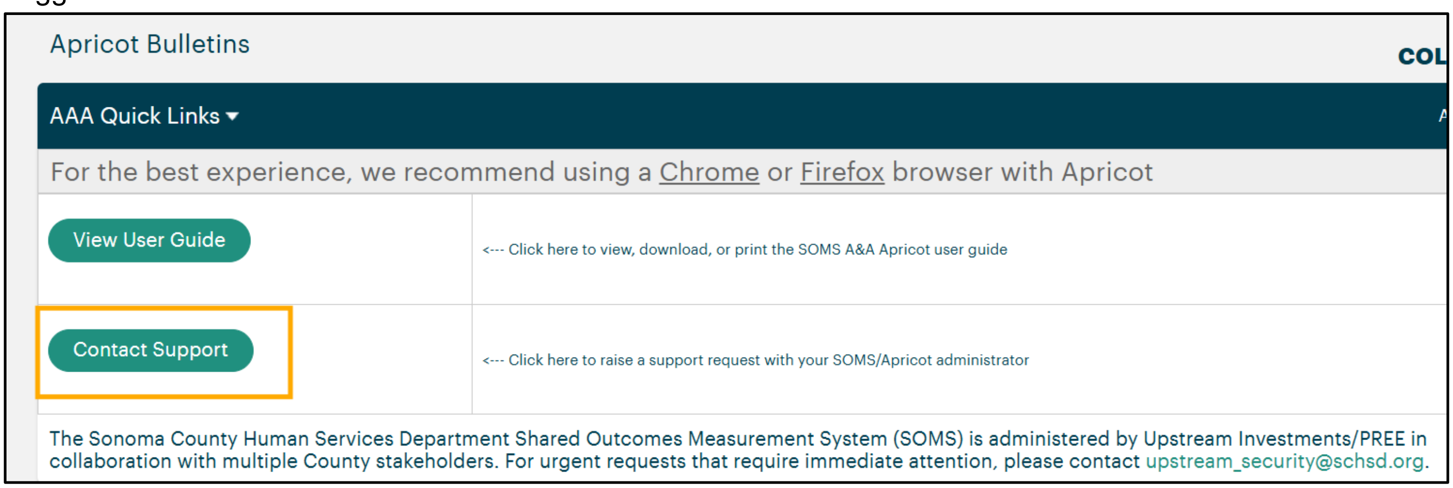
How to Log into Apricot

- Apricot works best in a Chrome or Firefox internet browser. Internet Explorer is not recommended.
- After you complete your required user agreement with Sonoma County, you will receive an email notifying you that you have been added to Apricot as a new Apricot User. The email will contain a link to reset your password.
    a. The email link is only active for 30 minutes; if the link has expired, go to apricot.socialsolutions.com and click Forgot Password. Follow the instructions to create a password.
- For subsequent logins, go to apricot.socialsolutions.com and enter your username (email address) and password
- If you are having trouble logging in, use the Forgot Password link, enter your email address, and follow the instructions for resetting your password

Support Requests

All questions/feedback/requests for assistance with Apricot should be directed to the software team via Support Request form. The support request form is available to be filled out whether or not the user is logged into Apricot.

Logged in:

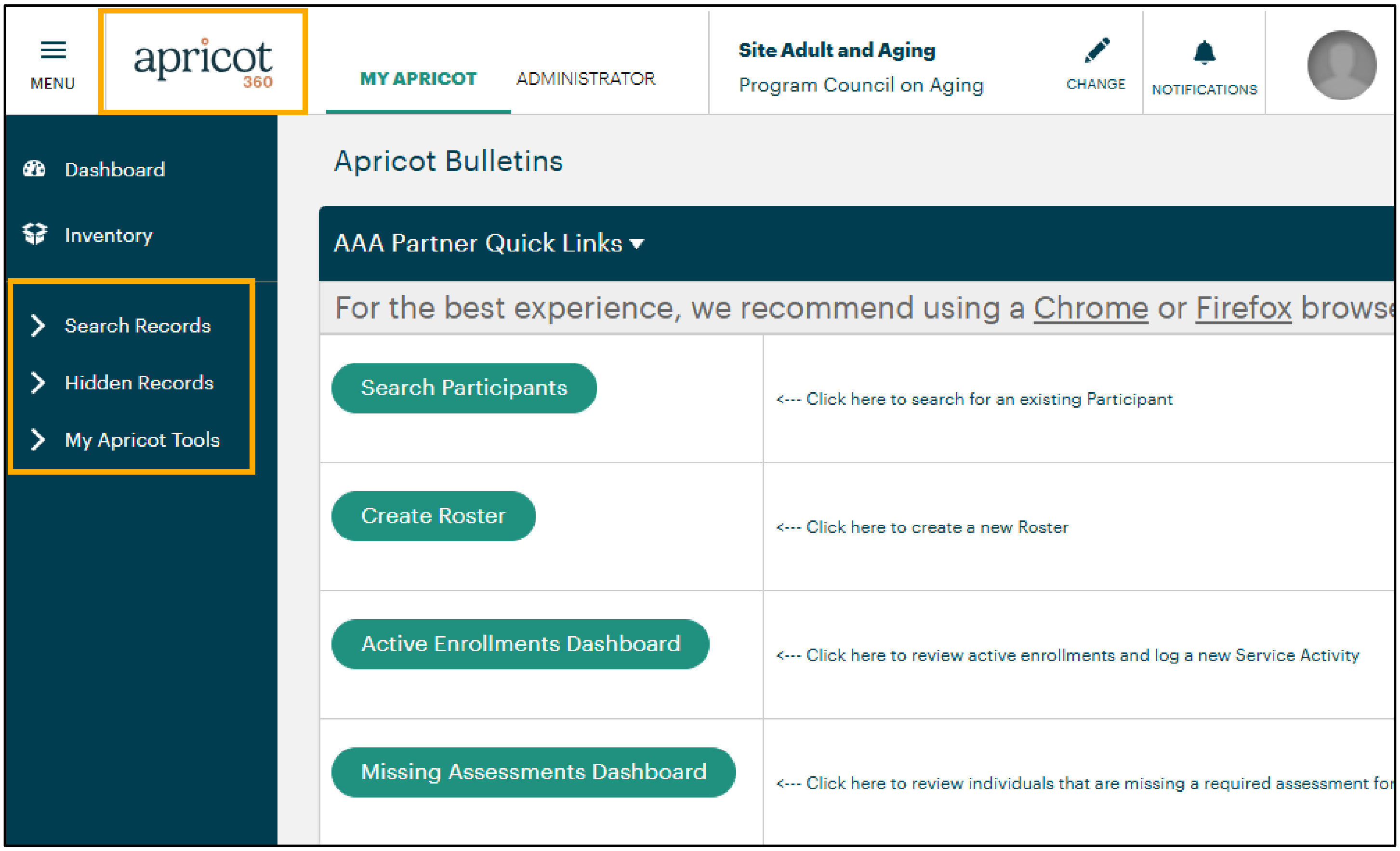


Not logged in: use this link

Home Screen and Bulletins

In general, navigation menus are always on the left side of the screen and quick links, data entry points, or end user guides/resources are presented in the center of the screen. Once you get into data entry screens, record actions will appear on the far right of the screen.

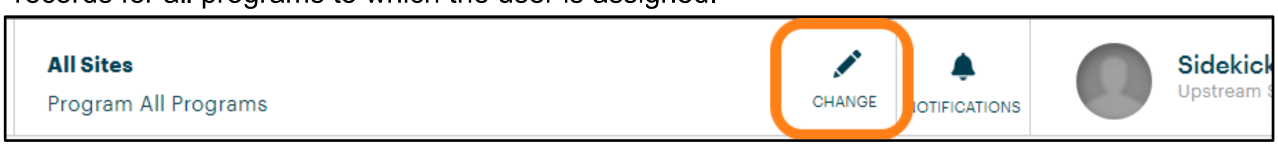
If you ever get lost in the system, you can always come back to this home screen in Apricot by clicking the Apricot logo on the upper left.



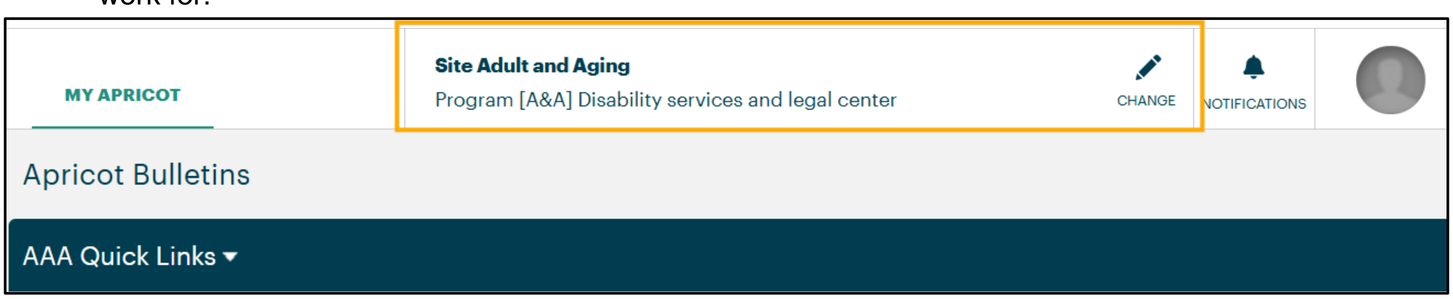
Users with Access to Multiple Programs for Permissions in Apricot:

When logged into Apricot, we recommend users confirm their assigned "program" at the top of the screen. Programs reflect services teams in AAA and/or External Partners. The purpose of this feature is to restrict access to who can view records in the system, based on the programs they have access to.

- Users assigned to multiple programs will see a pencil icon. Clicking the pencil icon will allow the user to flip their view from one program to another. If desired, selecting "all sites/all programs" will show records for all programs to which the user is assigned.

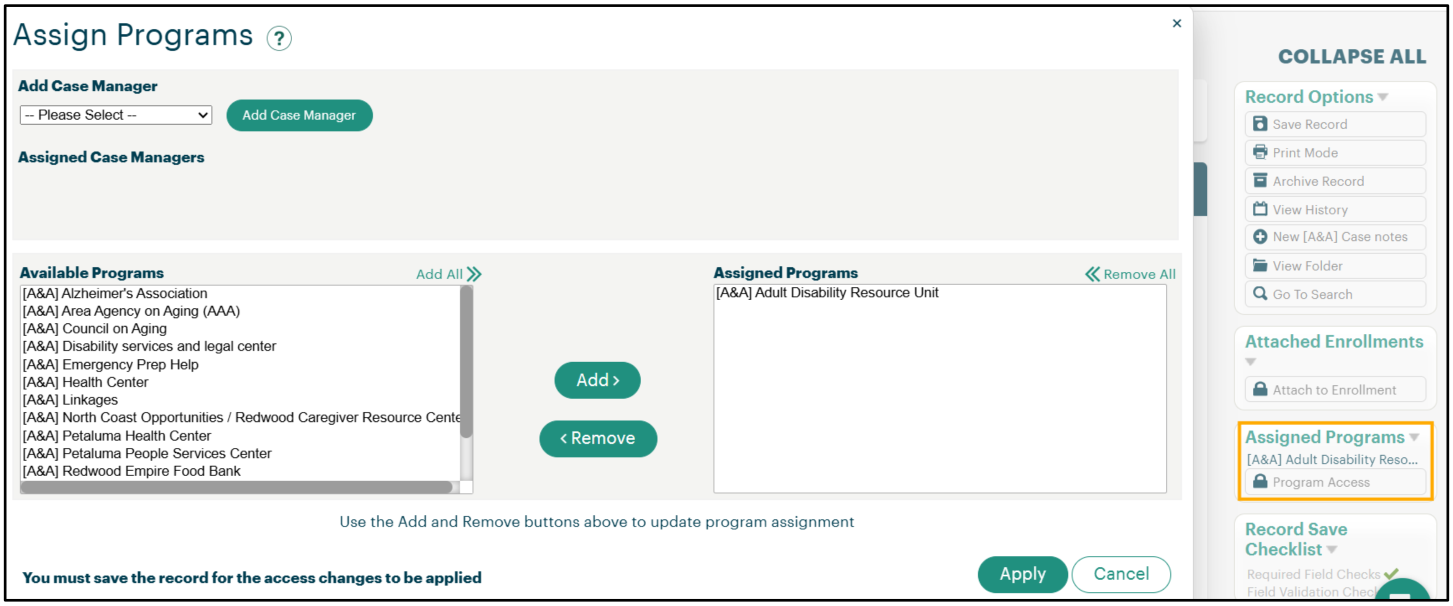


- Ensure you are on the Program/Partner that you work for/are entering in data for when creating a record to ensure that the dropdown options presented on forms are specific to the program/partner you work for.



    - Creating records from the All Sites All Programs will require you to select which programs to assign permissions to for the record upon Save of the record.

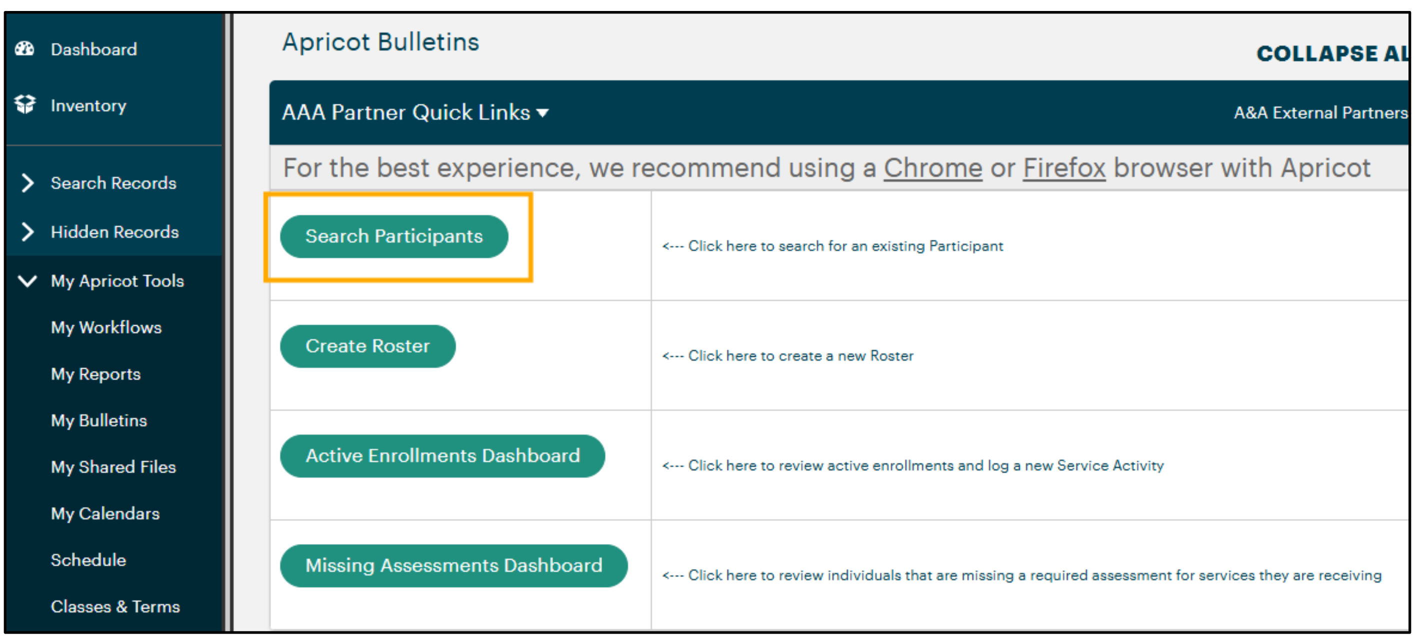
- If the record needs to be shared with another program for access, you can also select the Program Access button on the right side of a record to assign additional programs that you have permissions to.
  - Note options on the left side of the screen will be limited to those you have access to.



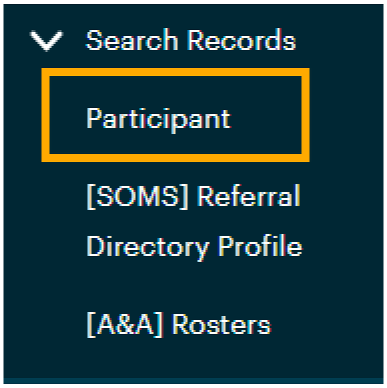
NOTE: If you believe the information in the program dropdown is incorrect, please contact support immediately.

How to Search Records

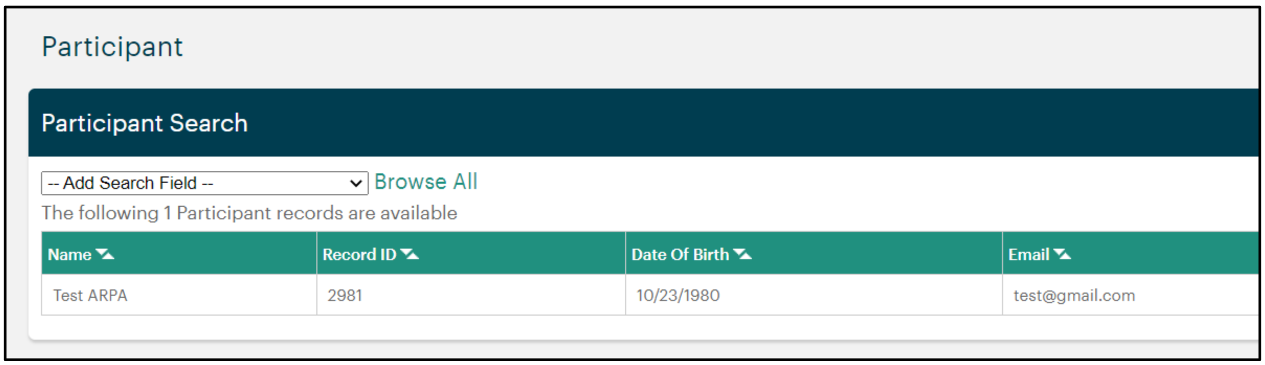
Clicking on the highlighted button will direct you to the participant search screen in Apricot.



Additionally, you can search for any Tier 1 record by expanding the “Search Records” category in the Menu sidebar and clicking on the name of the form. The forms visible to you here will vary depending on your level of access in the system.



Once you click on the form (either from a quick link button in the bulletin or from the Search Records menu) Apricot will open a search screen specific to that form. The below is an example of the search screen for Participants:

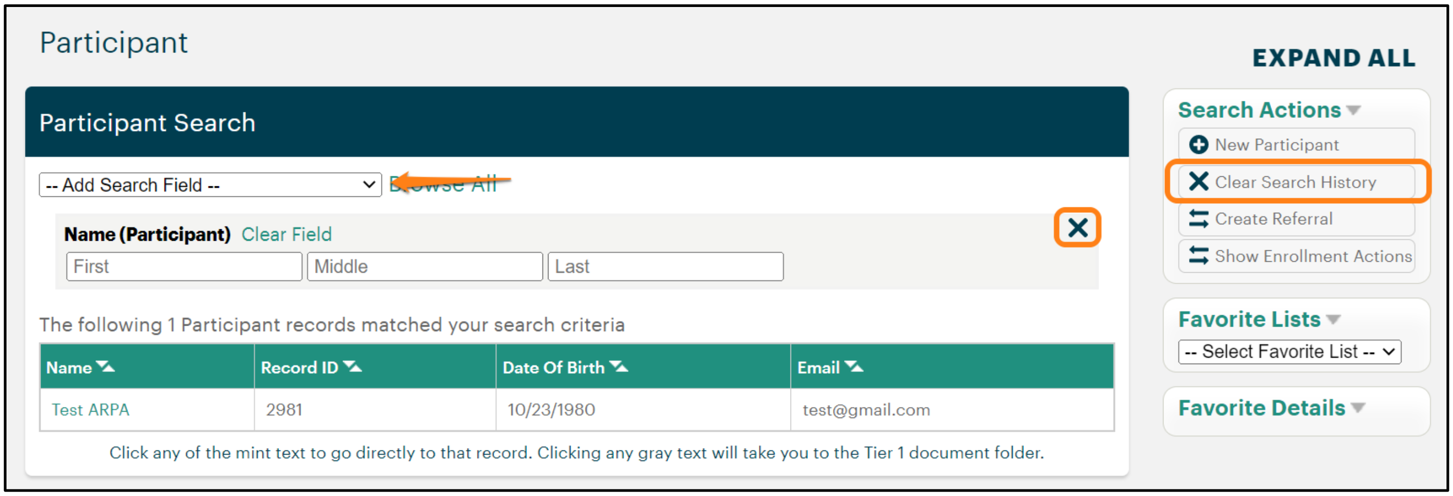


Using Search Parameters on a Tier 1 record

Without specifying any search parameters, Apricot will automatically show you all records you have access to for the T1 form. Users with access to multiple programs will see all data that matches their program assignment at the top of the screen. Clicking on any of the data fields in this window will take you directly to the document folder for that participant.

You can customize the search results by adding search fields. Click the “--Add Search Field--” dropdown menu at the top and select a search term. This list will show searchable fields from the participant (Name, Record ID Date of Birth, phone numbers).

Below is an example of adding a search field for Name:



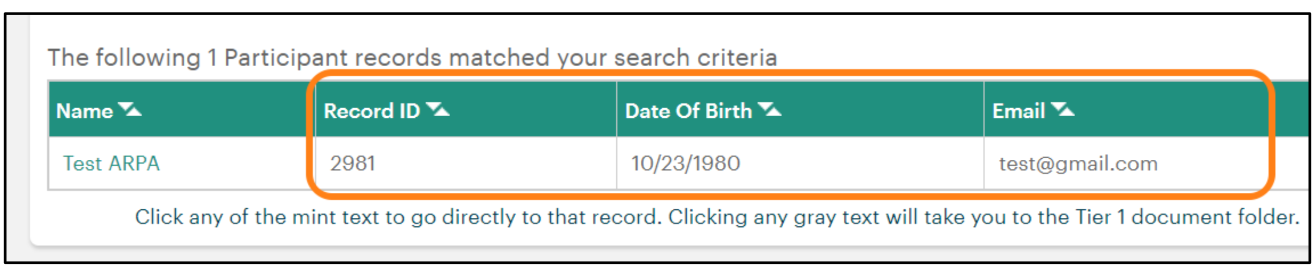
Your search field is “sticky” and only applies to you. Sticky means it will stay in place each time you log into Apricot. To remove the search term, click the small “x” on the right or click “Clear search history” in the Search Actions palette.

Navigating a Document Folder

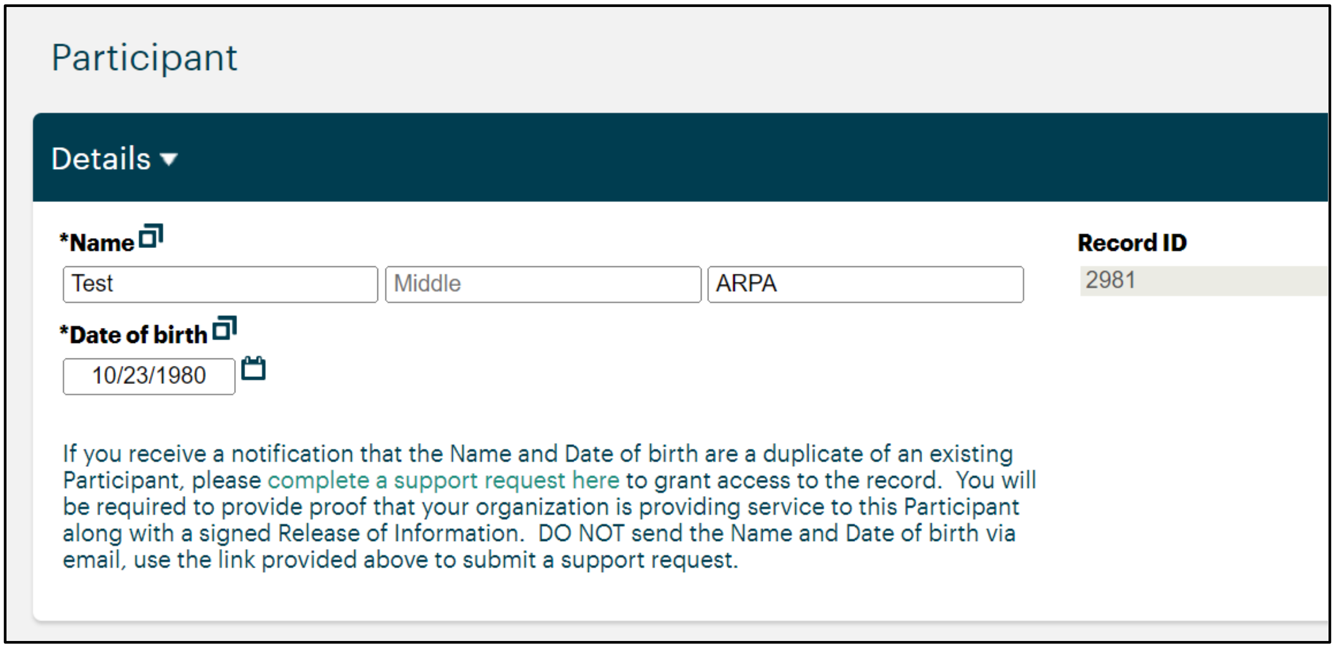
Apricot is a tiered system. Participant profiles are Tier 1 and contain information about the person that remains relatively static over time such as the person’s name, date of birth, demographics, and contact information.

Tier 2 records (for example, the Program Enrollment or Service Activities) are nested under the profile in a “Document Folder” and track history related to the person (e.g. enrollment in a specific program for services with a provider, and services provided over time.). Each Document Folder is specific to a person and will only show Tier 2 records specific to that person. Much of your day-to-day data entry will be via Tier 2 records housed in a participant/client’s document folder.

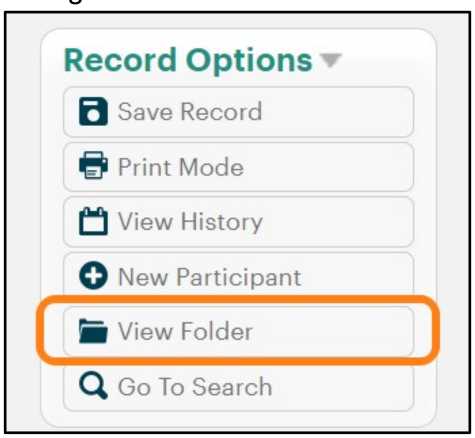
From the search screen, you can navigate to a person’s document folder by clicking on any of the gray text elements next to their name. In the screenshot below, click Record ID, Date of Birth, etc. to be taken to the document folder.



However, if you have added a search field for the person’s name, the Name in the search results will turn green and clicking on it will take you directly into that person’s profile record, which will look like this:

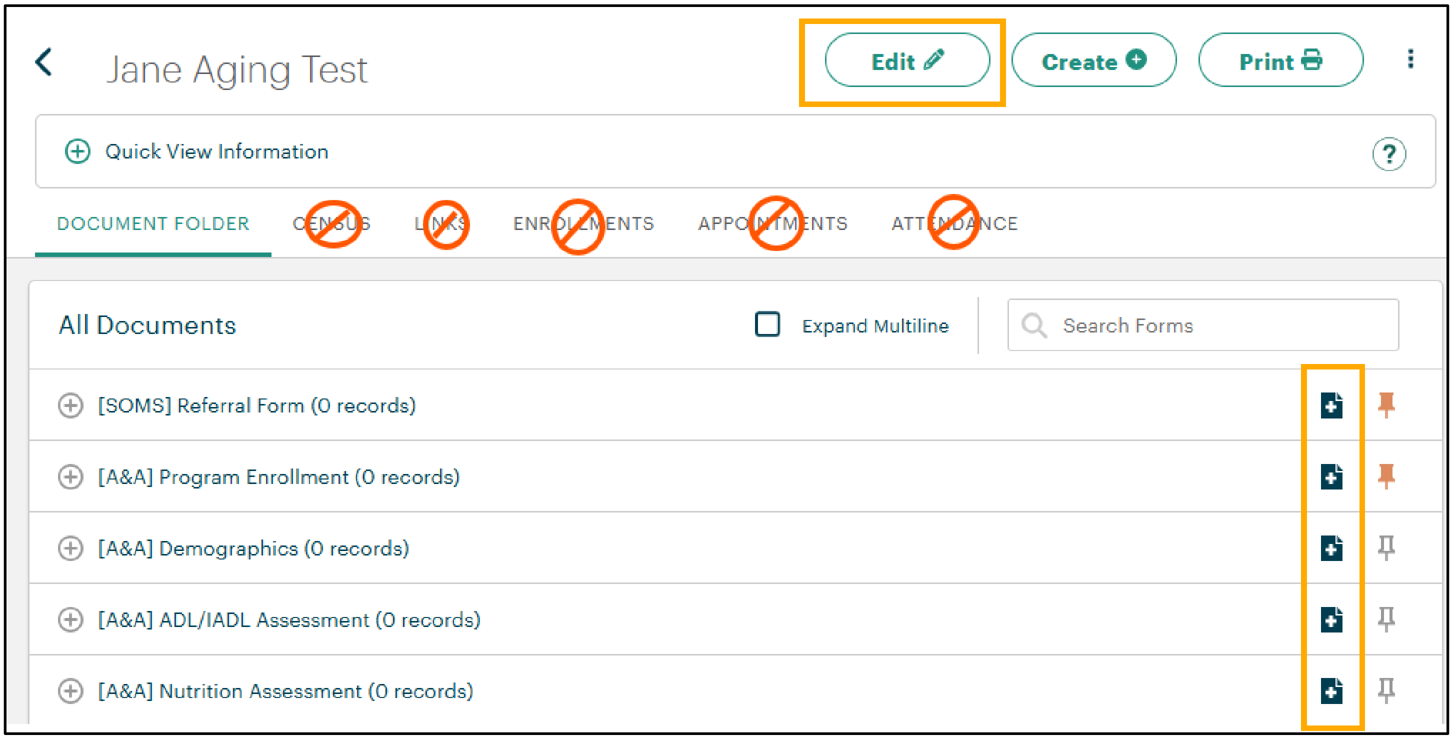


If you have navigated to a person's profile by mistake, click "View Folder" under the Record Options palette on the right.



The person's document folder will look like this:

- Do not click Census, Links, Enrollments or Appointments.



Please focus your data entry on the use cases documented in this guide outside of these elements.

The three buttons in the top right corner function as follows:

1. Edit - will take you back into the profile record where you can review data and make changes as needed.
2. Create - will allow you to create a new Tier 2 type record for this participant in their folder.
3. Print - will allow you to select which records to print (from the Tier 1 profile and all associate Tier 2 forms).

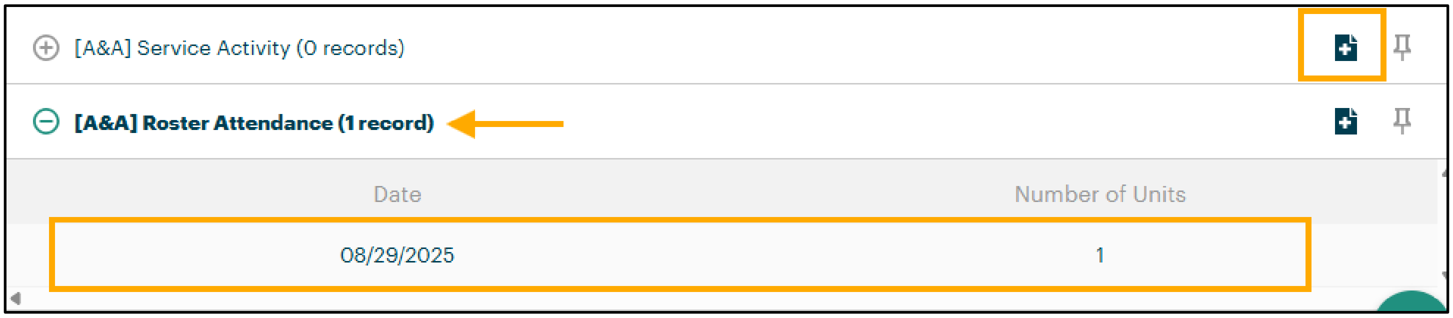
Directly under the participant's name, click on the section labeled Quick View Information to open a box that will display key information from the profile record.

The document folder contains the Tier 2 forms you will need for your ongoing data entry about a single person. You can view existing Tier 2 records or create new Tier 2 records from this screen.

NOTE: please note that the tab labeled "enrollments" is not required for data entry in SOMS 2.0. Please ignore.

Clicking the name of a form with 1 or more records will expand the section to show you quick view information for records already entered. Below is an example of Test's quick view information on their ROI. Clicking on any of the data fields from this screen will open the record.

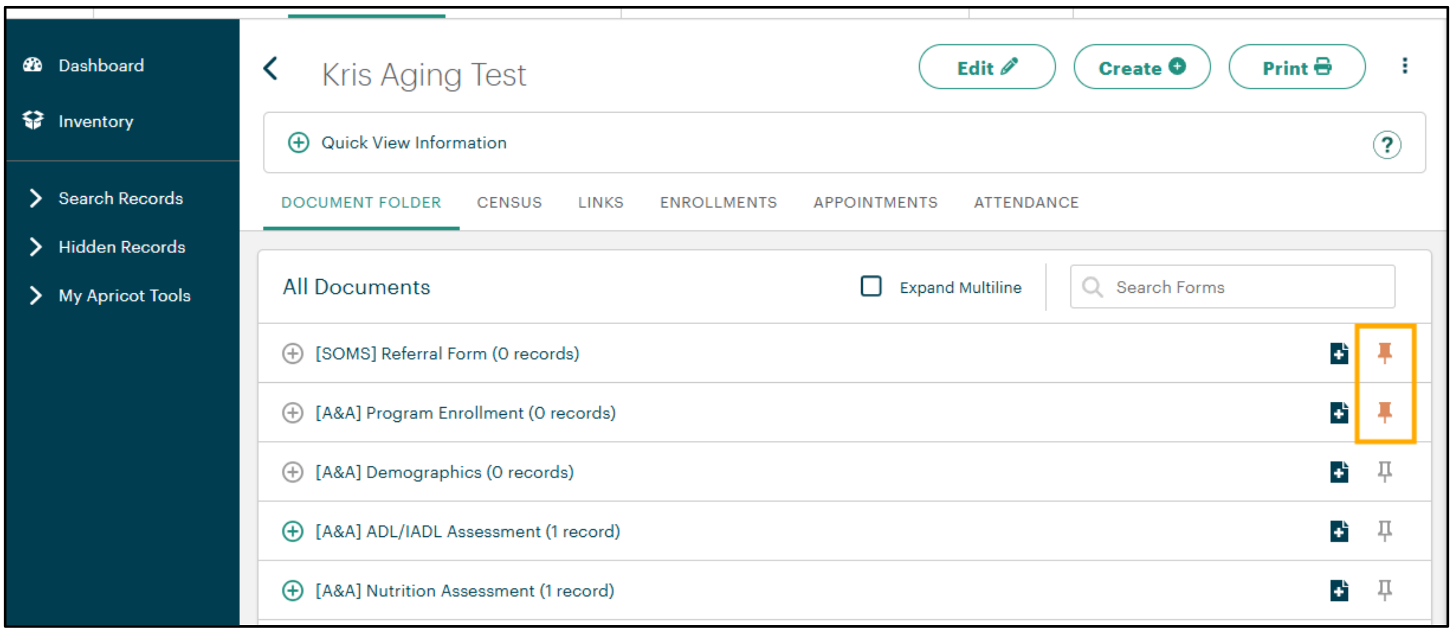
Clicking on the "+" icon on the far right of the form name will create a new blank record for you to fill out:



Pinning Document Types in the Document Folder

From within a document folder, you may “pin” frequently used document types:

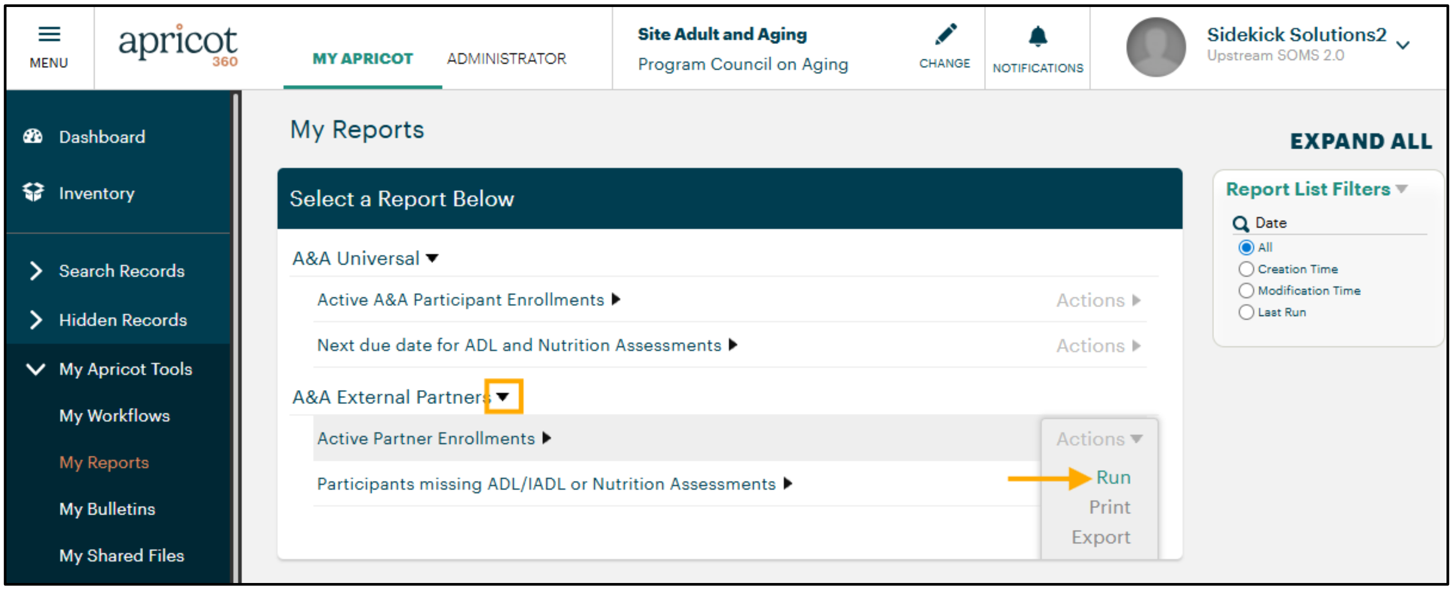
- Once you click the pin icon and refresh the page, you will see that the pinned forms appear at the top of the forms list in the Document Folder. This setting is specific to the User who clicks the pin, and will apply across all document folder views for that user. It will not affect other users in the system.



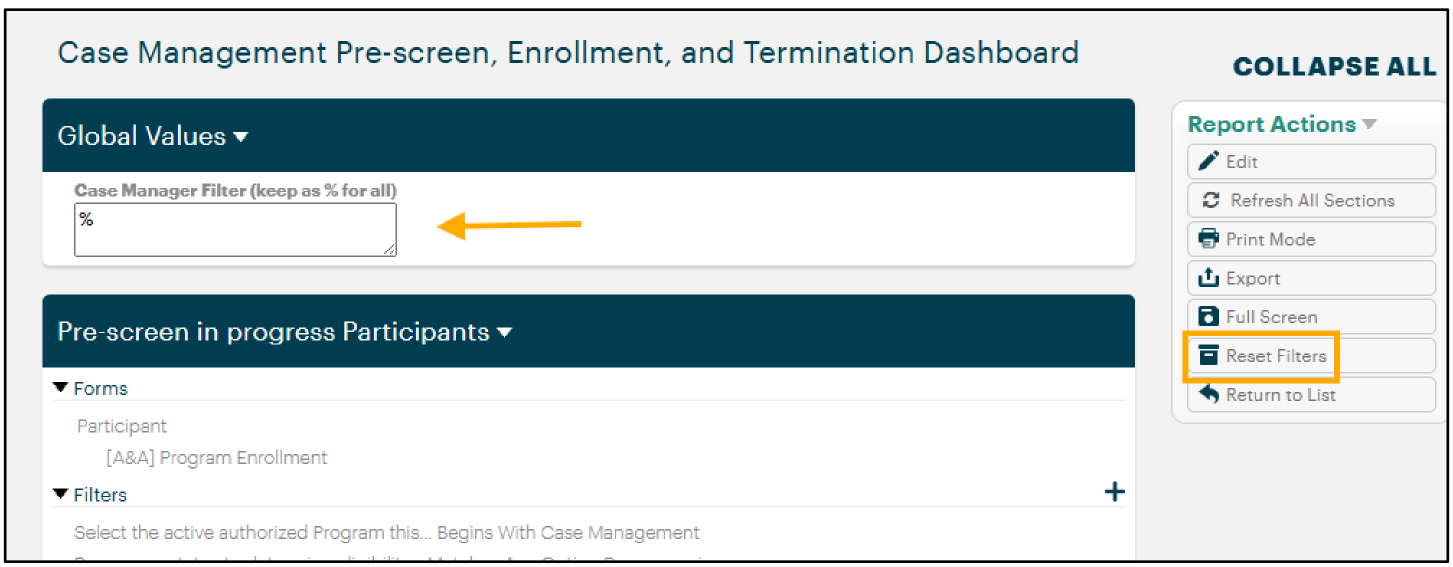
Running Reports

From the homescreen, access the My Apricot Tools menu, and select the My Reports section.

- Note, different report options will show depending on your permissions.
  - Some of the frequently used reports are also accessible via buttons on your main landing page bulletins.
- Select the report category arrows to expand the available options.
  - From the Actions menu on the right hand side of each report row, hover over the Actions to select the option to Run the report.



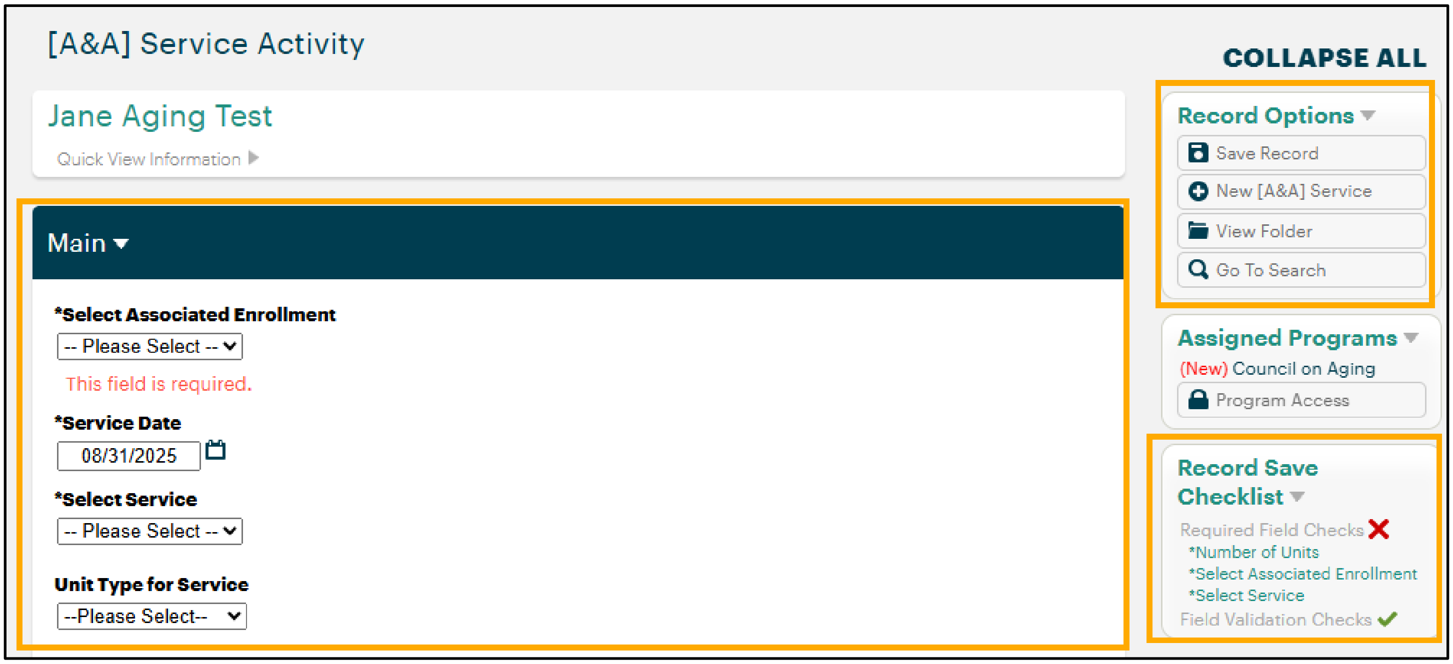
- If the report uses Global Values filters, enter in the filter values accordingly for which records you are searching for.
    - Note: The filters will hold the last run values you selected for the report. You may use the Reset Filters button from the Report Actions menu to reset the options.



Completing Data Entry Tasks

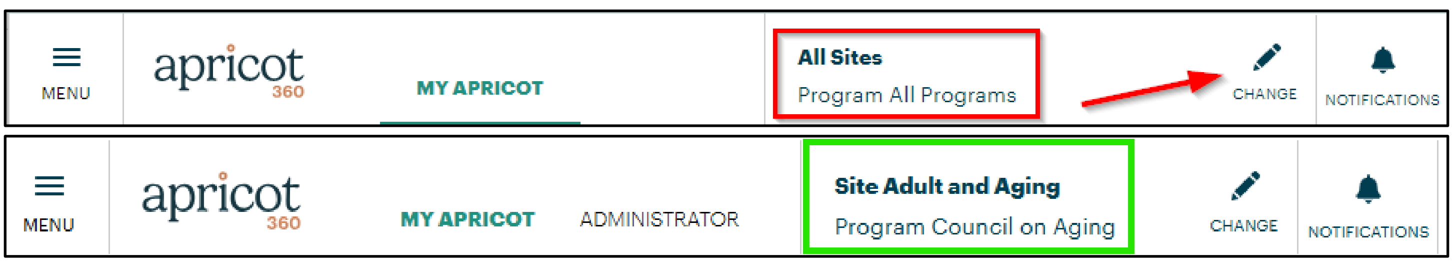
When you open a data entry form in Apricot (either to view or create new) it will always have the following components:

1 - Form sections and data entry fields - these appear in the center of the screen
2 - Required Fields/Record Save Checklist - these are marked with an asterisk and in the pallet on the far right
3 - Record Options Pallet - the Save Record button will always appear on the upper right corner

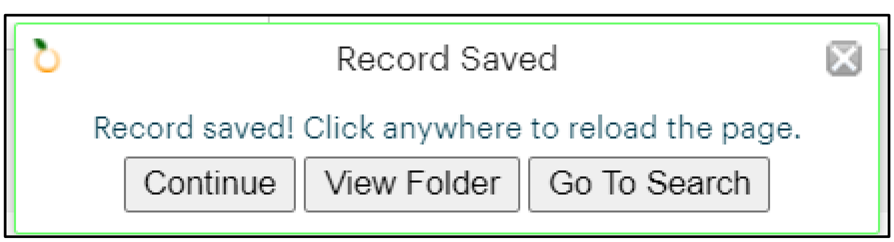


With each blank form in Apricot, it is best practice to start at the top of the form and work your way to the bottom. Pay close attention to required fields marked with an asterisk (these are also noted in the Record Save Checklist).

NOTE: Prior to saving any record, users who are assigned to multiple programs should select the appropriate program at the top of their screen by clicking the Change icon. If the Change icon is not present then your user is assigned one program and may proceed to saving your record.



Once data entry is complete, and you have entered all required data (including links), always remember to click "Save Record" in the Record Options in the top right of the screen or you will lose your work. Once you have successfully saved a record in Apricot, the Record Saved message will pop up at the top of the screen, which will look like this:



Selecting "Continue" will keep you on the same screen
Selecting "View folder" will take you back to the document folder

Selecting “Go To Search” will take you all the way back to the Tier 1 search screen

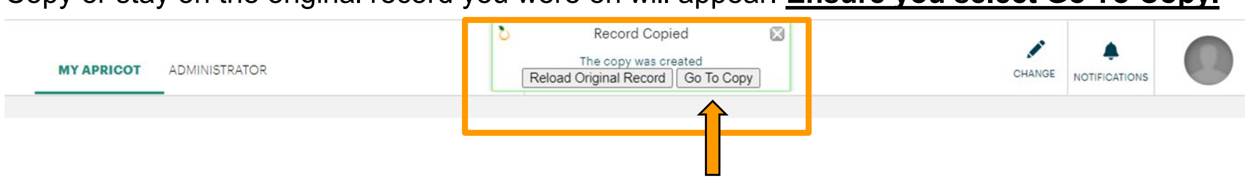
Creating a Copy of an Existing Record

Copy Record is enabled for some of the record types in the system- for example:

- Rosters
- A&A Demographics
- Nutrition Assessment
- ADL/IADL Assessment

Steps:

- First, you will want to search existing records to find the record you want to make a copy of.
    - For Tier 1 records, you can search from the pertinent search records screen.
    - For Tier 2 records within a Participants Document folder, you can review the existing records in their Document Folder.
- Once you find the record you would like to copy, open the record and verify this is the record you need to copy.
- Once you have opened the existing record you want to copy, you will need to select the Copy Record option from the Record Options menu.
    - **Note: Once you click Copy Record, the new record will automatically be created- if you do this on accident, the copy will need to be archived to ensure it does not affect reports. Either go to the copy of the record and select Archive, or contact your apricot administrator for assistance in archiving the record.
        - This can be searched for by created date and user if needed.
- Once you click Copy Record, a copy is created and a pop-up asking you if you would like to go to the Copy or stay on the original record you were on will appear. **<u>Ensure you select Go To Copy.</u>**



- You will know you are on the copy of the record because the certain fields will be blank and show as required.
- Review all fields and ensure you update any others as necessary.

Specific Use Cases:

Client Intake

These steps are used by all providers for creating and managing Participants and their associated records in the system.

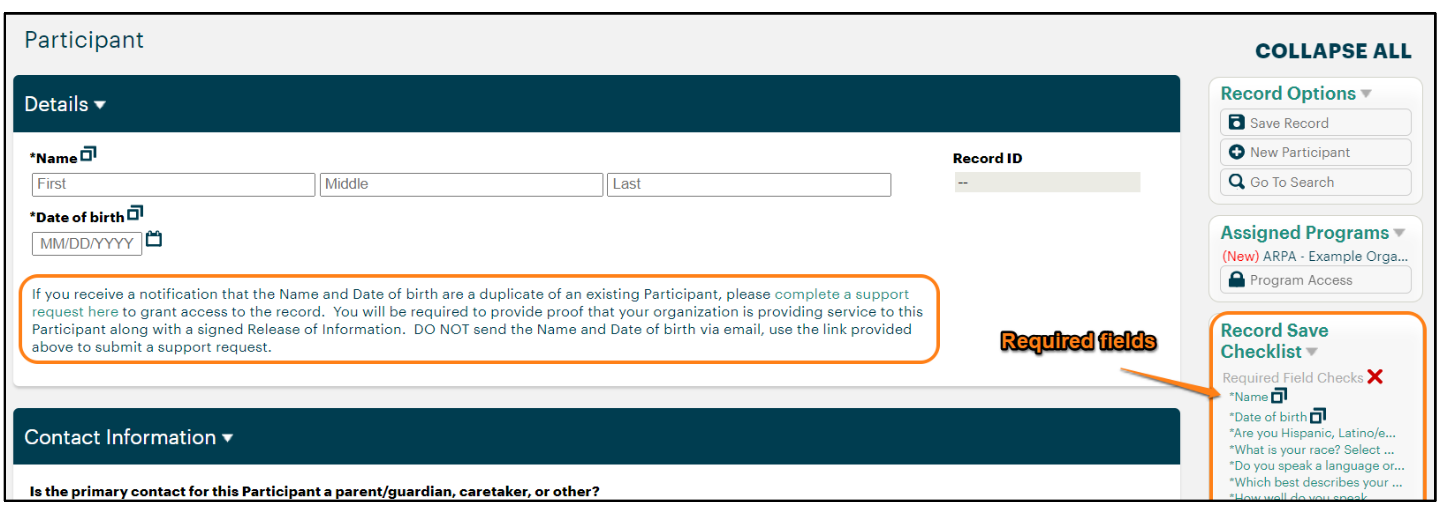
Creating and Managing Participant records

Considerations:

- Name and Date of Birth are currently being used as the system duplicate checks
    - i.e. if someone attempts to create a Participant profile with the same name and date of birth as a participant profile already in the system, the system will not allow them to save.
        - NOTE: First, Middle, Last, and Date of Birth all need to match exactly for duplicate check to fire (ie if middle name is different, they will not be considered duplicates).
        - NOTE: If you do not know the DOB, you can enter in 9/9/9999
        - **Please enter the middle name as “Aging” and the last name as “Test” for all Test Participant records- we will use this to identify records to archive if/as needed.**
- You can search by phone number, name, and DOB
- If you do not have the answer to one of the required demographics, you may select Unknown.
- Note that [additional demographic information] is captured on a separate form within the participants folder

Steps:

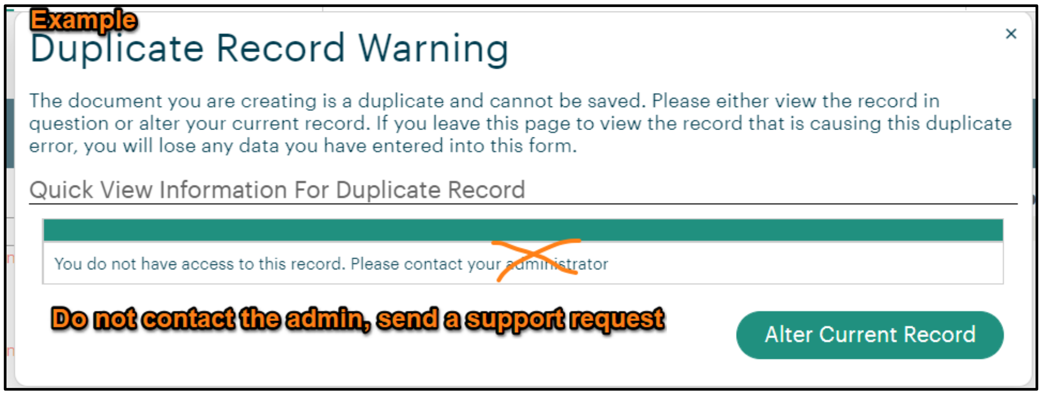
- From the left “Search Records” menu or from your Quick Links bulletin, search for Participants records.
    - First, you will want to search existing records to ensure you do not already have a Participant file for the individual.
        - Click the Add Search Field and select which field (typically name) that you want to search.
            - Fill out the appropriate fields for the search.
                - If the Participant appears to already have a record, click the name which is a link directly to the Participant record and verify the participant is the same individual.
                    - If yes, you will proceed to their Creating an Enrollment step.
                    - If there are no records returned, you may proceed to create a new record by clicking New Participants from the right “Search Actions” menu.
    - Complete all required and optional items:
        - Complete all required fields on the participant profile from top to bottom. Notice the record save checklist on the far right.
            - All required fields must have a value; there are “Unknown” values that can be selected in the event the data is unknown.
    - When complete, click Save Record.



Participant Duplicate Check Warning

- If you receive a duplicate warning message (example below) while entering the Name and Date of Birth fields, follow the instructions provided on the form (**NOTE: do not contact the administrator, fill out the support request form**):

  "If you receive a notification that the Name and Date of birth are a duplicate of an existing Participant, please complete a support request here to grant access to the record. You will be required to provide proof that your organization is providing service to this Participant along with a signed Release of Information. DO NOT send the Name and Date of birth via email, use the link provided above to submit a support request."



Creating and Updating A&A Demographics records

This form lives within the Participants document folder and should be used to capture all additional demographics information required by various funders/reporting for A&A services. This is required for all participants enrolled for ongoing services, and should be captured when possible for all other participants that may receive any service with A&A programs.

If updates need to be made to the form, create a copy of the existing one, and make changes on the copy. This allows for capturing changes over time for the demographics on this form, many of which may change over time (ex: income).

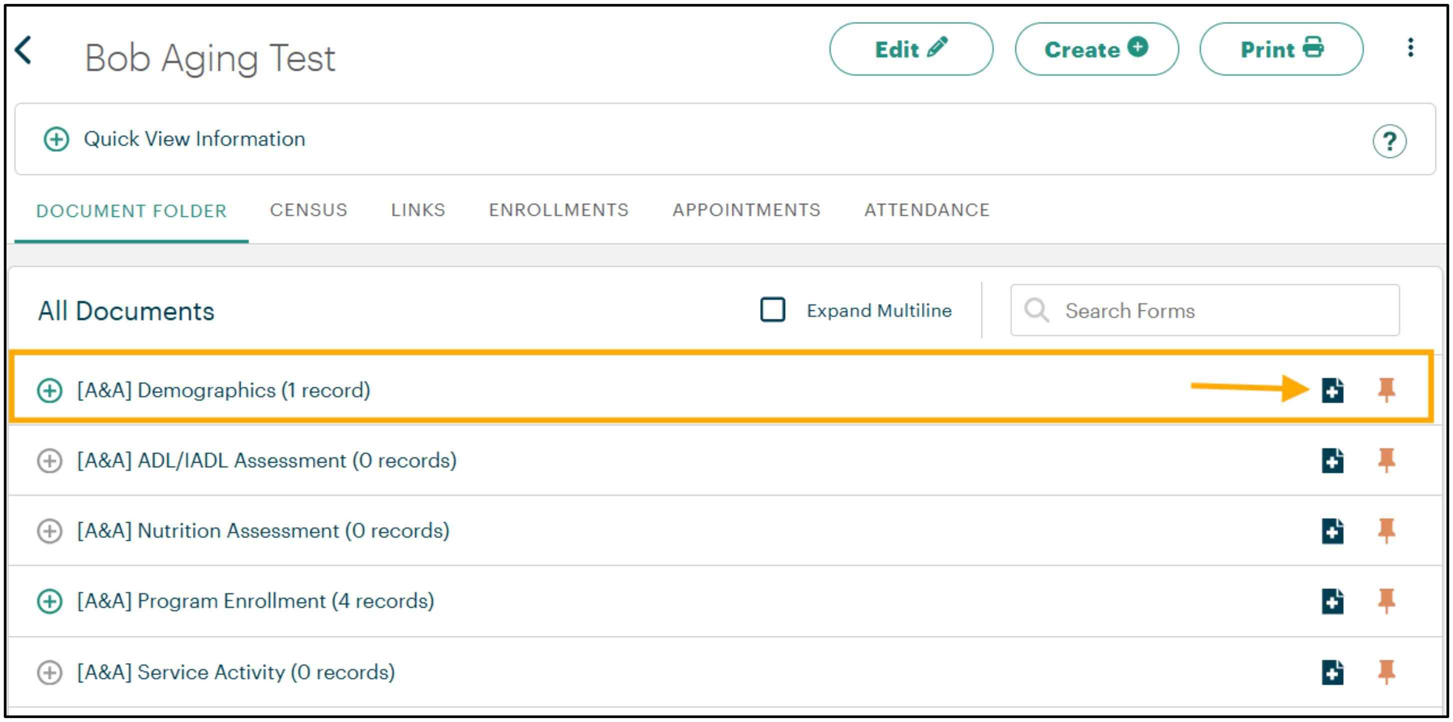
Considerations:

- These fields will clear on copy:
  - Date Collected
  - Client Consent and Date fields for the veteran consent information

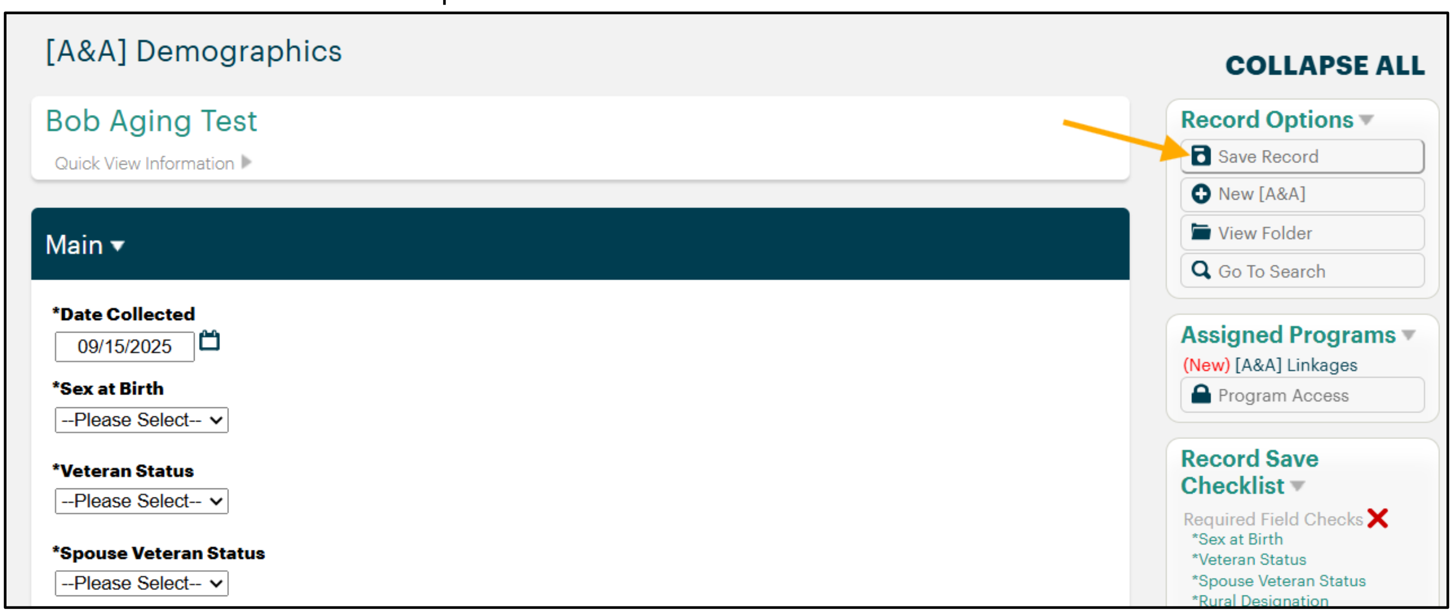
Steps:

- Navigate to the Participant's Document Folder
  - Either:
    - If already on a record related to the Participant, select "View Folder" from the "Record Options" menu on the right side.
    - From the left "Search Records" menu, search for Participants record and click into any cell that does not have green/mint text

- Find the “A&A Demographics” document type and select the black paper plus sign to the right to create a new record.



- Complete all required fields and applicable optional fields.
- Save the record once complete.



Creating and Updating ADL/IADL Assessment records

This form lives within the Participants document folder and should be completed annually for Participants receiving any services requiring ADL/IADL data. This is required for all participants enrolled for ongoing services that have an ADL/IADL requirement, and should be captured when possible for all other participants that may receive any service with A&A programs.

If updates need to be made to the form, [create a copy of the existing one](), and make changes on the copy. This allows for capturing changes over time for the items on this form, many of which may change over time.

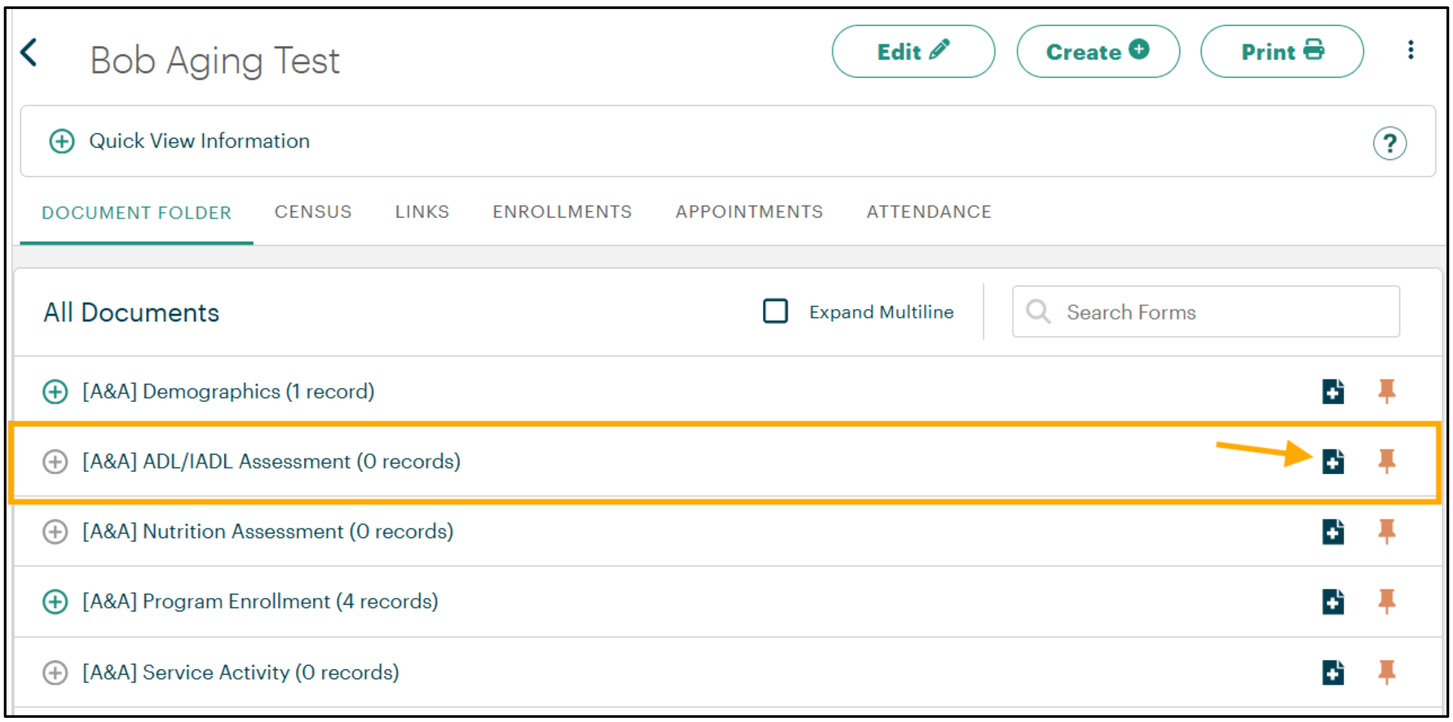
The "[Participants missing ADL/IADL or Nutrition Assessments]()" report can be used to monitor for participants that receive services that may require this assessment.

Considerations:

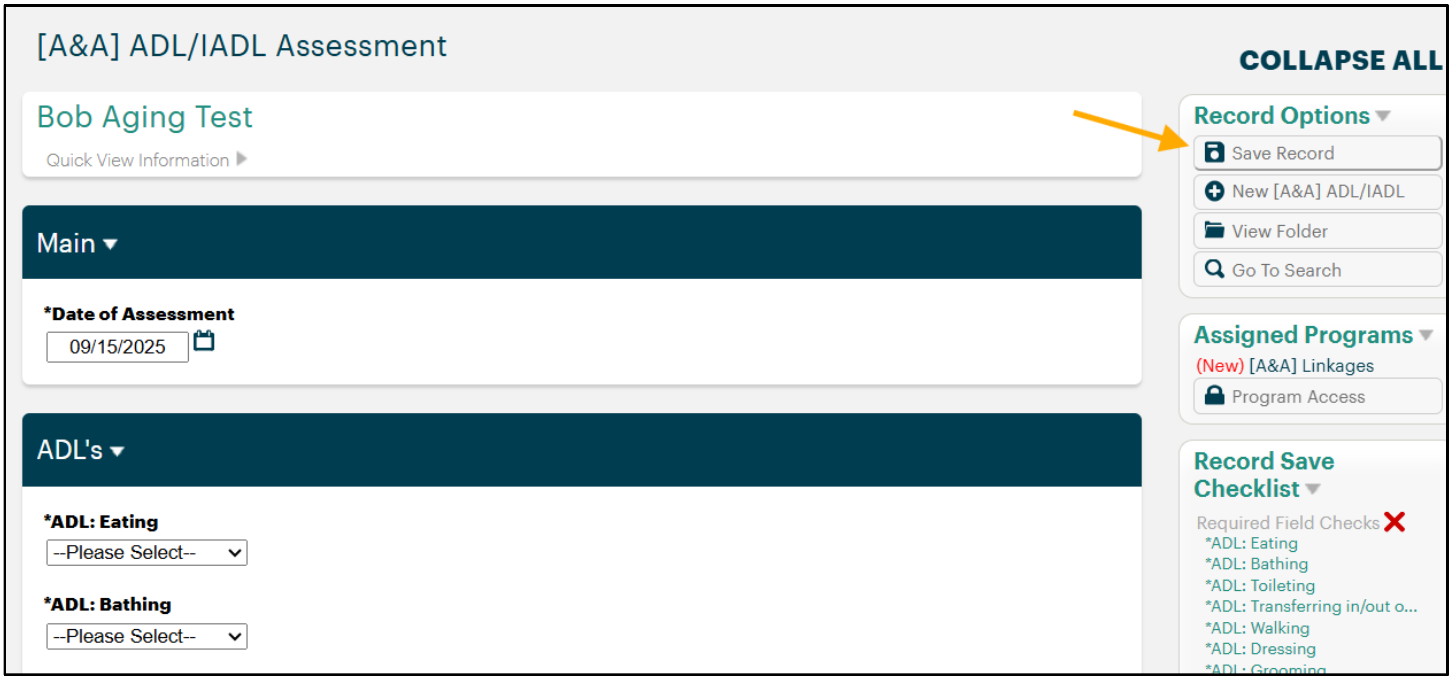
- These fields will clear on copy:
    - Date Collected

Steps:

- Navigate to the Participant's Document Folder
    - Either:
        - If already on a record related to the Participant, select "View Folder" from the "Record Options" menu on the right side.
        - From the left "Search Records" menu, search for Participants record and click into any cell that does not have green/mint text
- Find the "ADL/IADL Assessment" document type and select the black paper plus sign to the right to create a new record.



- Complete all required fields and applicable optional fields.
- Save the record once complete.



Creating and Updating Nutritional Risk Assessment records

This form lives within the Participants document folder and should be completed annually for Participants receiving any services requiring Nutritional Risk data. This is required for all participants enrolled for ongoing services that have an Nutritional Risk requirement, and should be captured when possible for all other participants that may receive any service with A&A programs.

If updates need to be made to the form, create a copy of the existing one, and make changes on the copy. This allows for capturing changes over time for the items on this form, many of which may change over time.

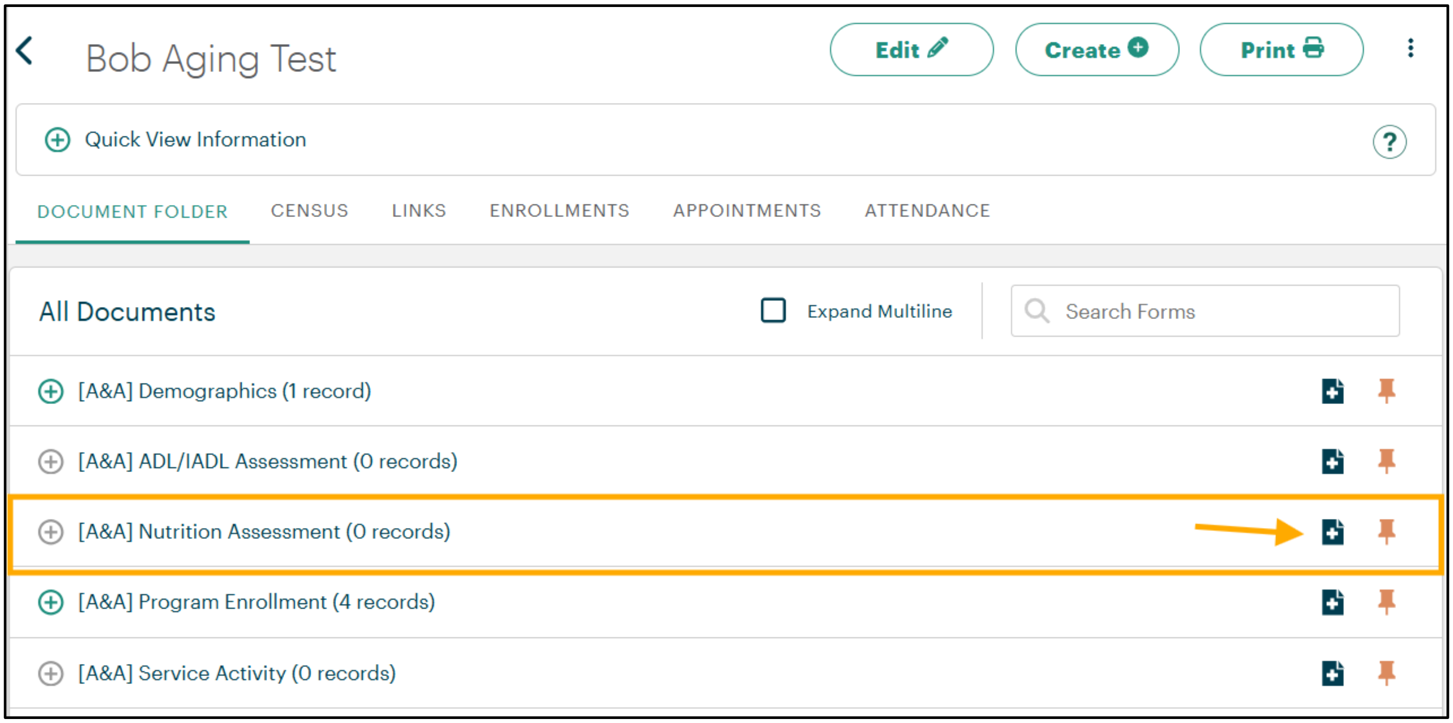
The "Participants missing ADL/IADL or Nutrition Assessments" report can be used to monitor for participants that receive services that may require this assessment.

Considerations:

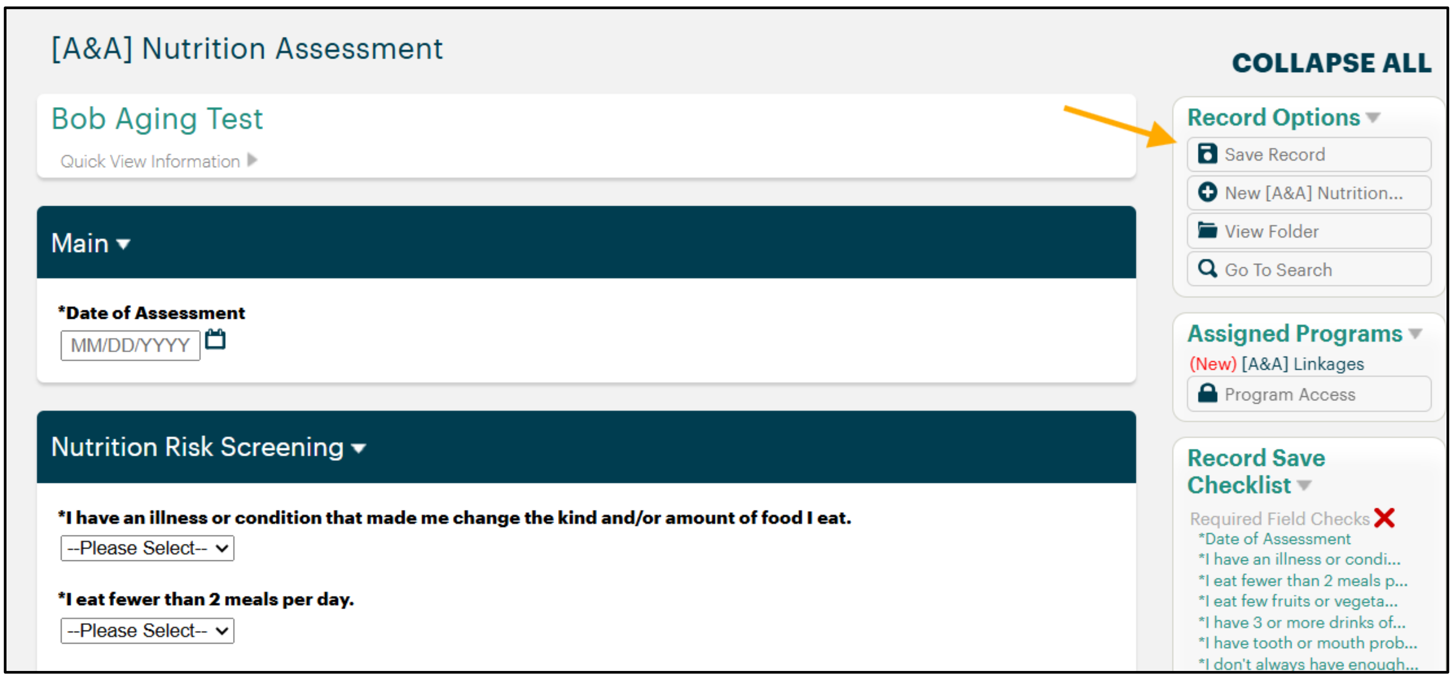
- These fields will clear on copy:
  - Date Collected

Steps:

- Navigate to the Participant's Document Folder
  - Either:
    - If already on a record related to the Participant, select "View Folder" from the "Record Options" menu on the right side.
    - From the left "Search Records" menu, search for Participants record and click into any cell that does not have green/mint text
- Find the "Nutritional Risk" document type and select the black paper plus sign to the right to create a new record.



- Complete all required fields and applicable optional fields.
- Save the record once complete.



Creating and Managing Program Enrollment records

This record should be created each time a Participant is being considered for enrollment in a program, and updated based on their intake status or completion/exit from the program. This should be completed for Participants receiving individual services, core services, as well as roster type services.

Any contact/activity made with the client while completing intake, can be tracked through the Case Notes and Contacts records.

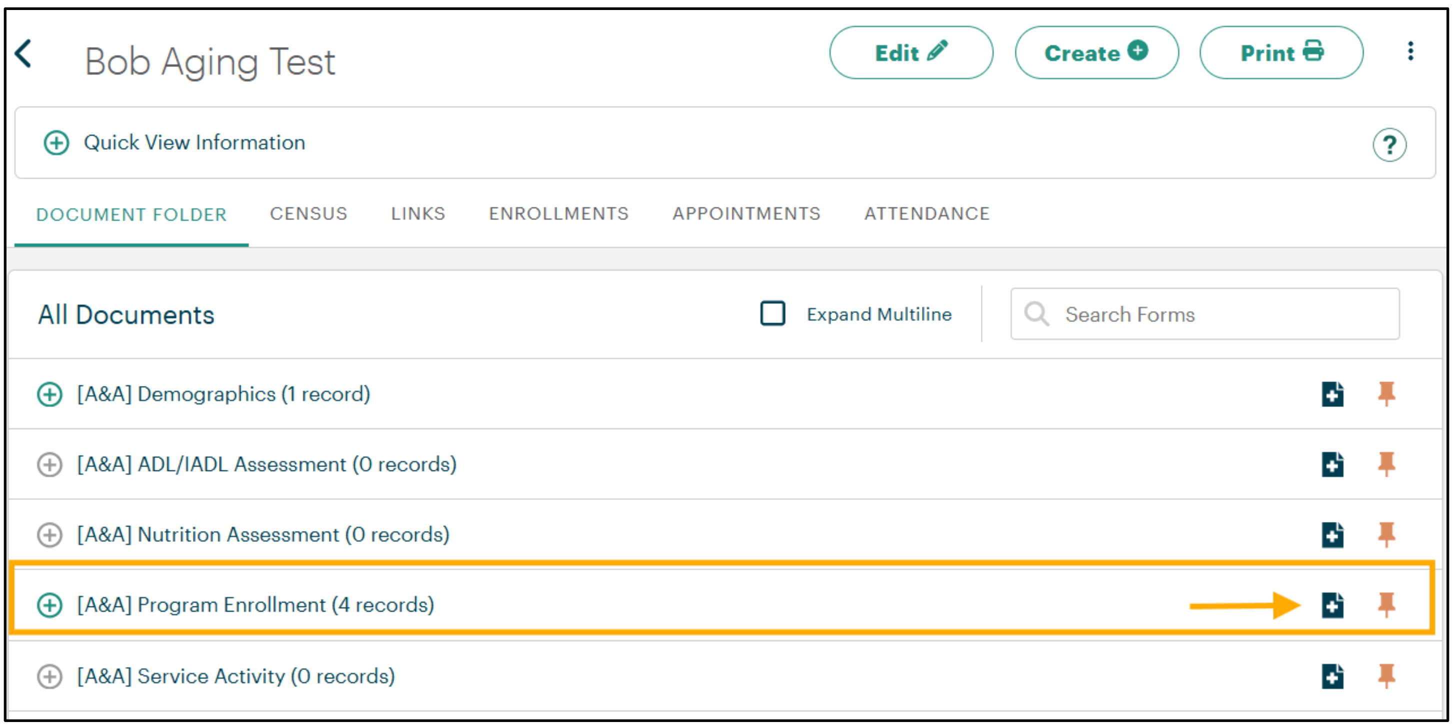
For enrolling participants:

Considerations:

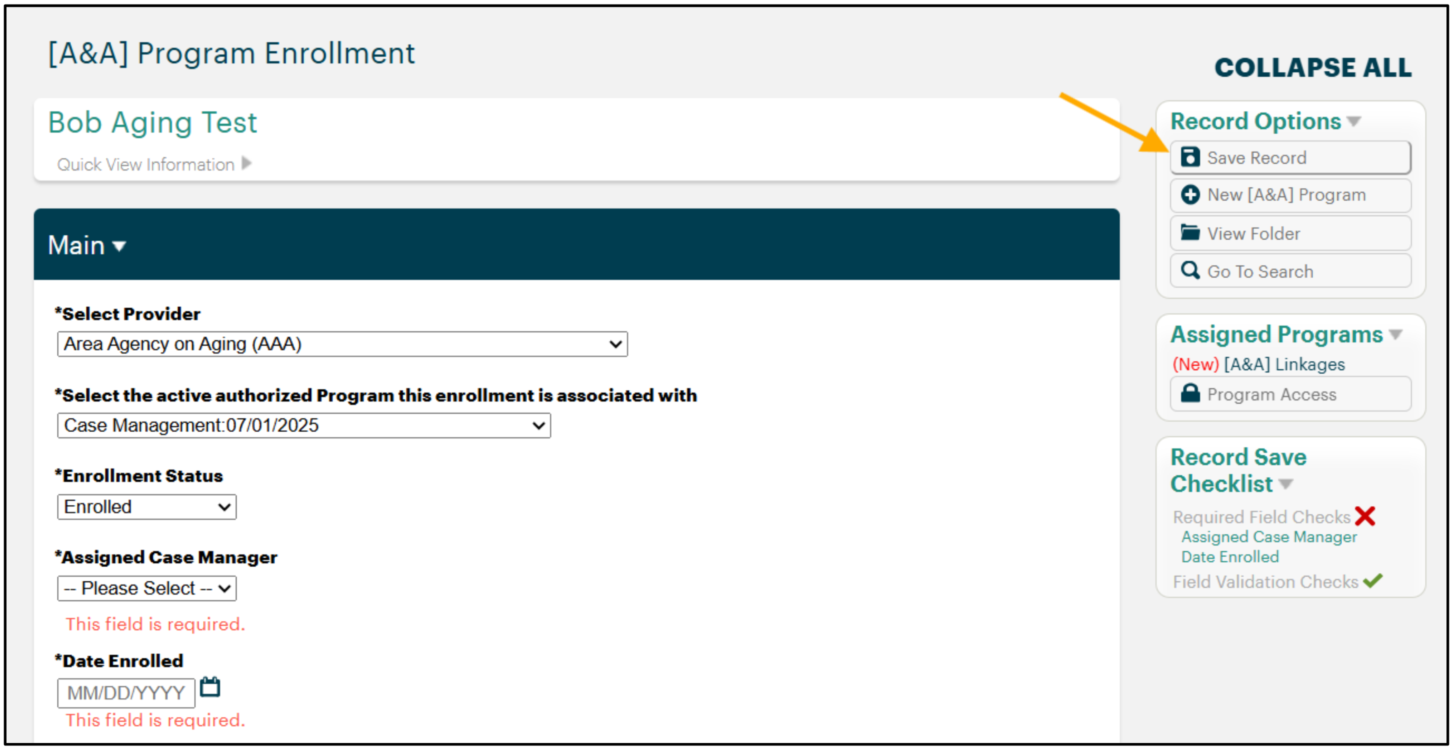
- The “Active authorized program the enrollment is tied to” links to the Provider Authorized Program and Services records. If one is not available for the program the participant is being considered for, contact the A&A Site Administrator.
- The Assigned Case Manager field pulls from the Provider Staff records - if one is missing, contact the A&A Site Administrator.
- Case Management only: The Termination Request section should be completed by the Case Manager, which will then be reviewed by the supervisor.

Steps:

- Navigate to the Participant's Document Folder
    - Either:
        - If already on a record related to the Participant, select “View Folder” from the “Record Options” menu on the right side.
        - From the left “Search Records” menu, search for Participants record and click into any cell that does not have green/mint text
- Find the “A&A Program Enrollment” document type and select the black paper plus sign to the right to create a new record.



- Complete all required fields and applicable optional fields.
    - The status allows for tracking participants through the referral process- regardless of outcome.
    - If the Participant is referred/screened, but not accepted, you may track this as well through the discharge information and reasons.
- Save the record once complete.



For closing/exiting participants:

Information should be entered/updated on the Program Enrollment form to close the enrollment- this can be due to ineligibility for enrollment or at the close of services.

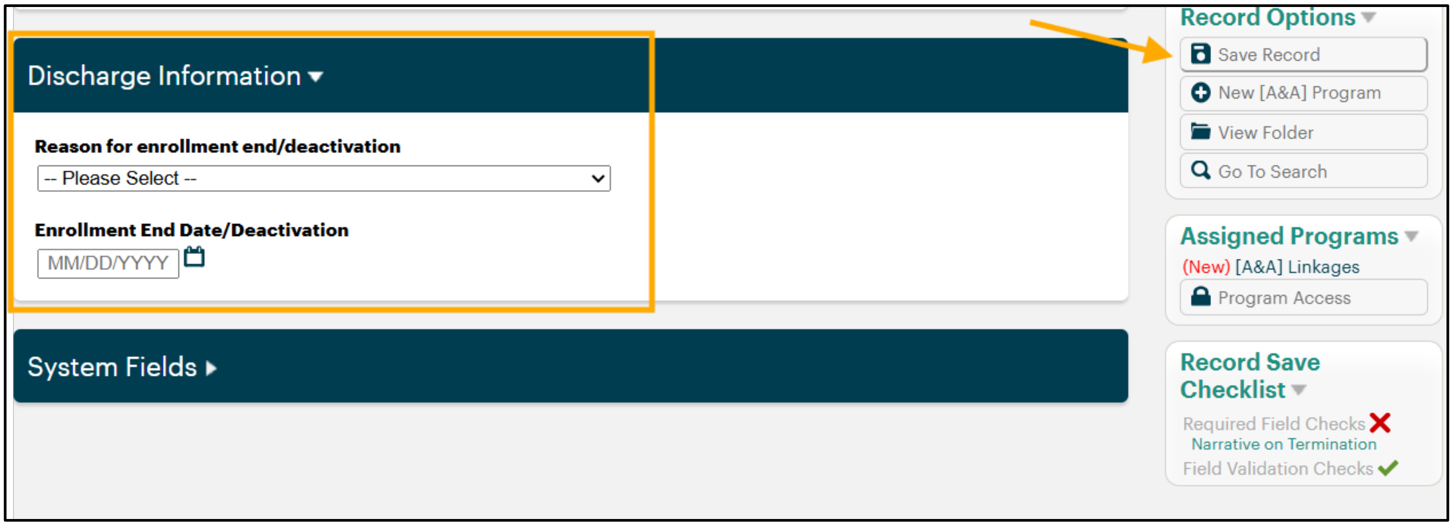
For Case Management, the termination request can be completed on the form, and then the supervisor can review for discharge and finish the discharge information as needed.

Considerations:

- The discharge date will be required if a Participant is determined ineligible for enrollment
- Do not update the status once a participant has been enrolled in a program. You only need to add a discharge date and reason to exit them.

Steps:

- Find the existing/pertinent “A&A Program Enrollment” document type and open the record.
- Complete pertinent fields in the Discharge Information section.
- Save the record once complete.

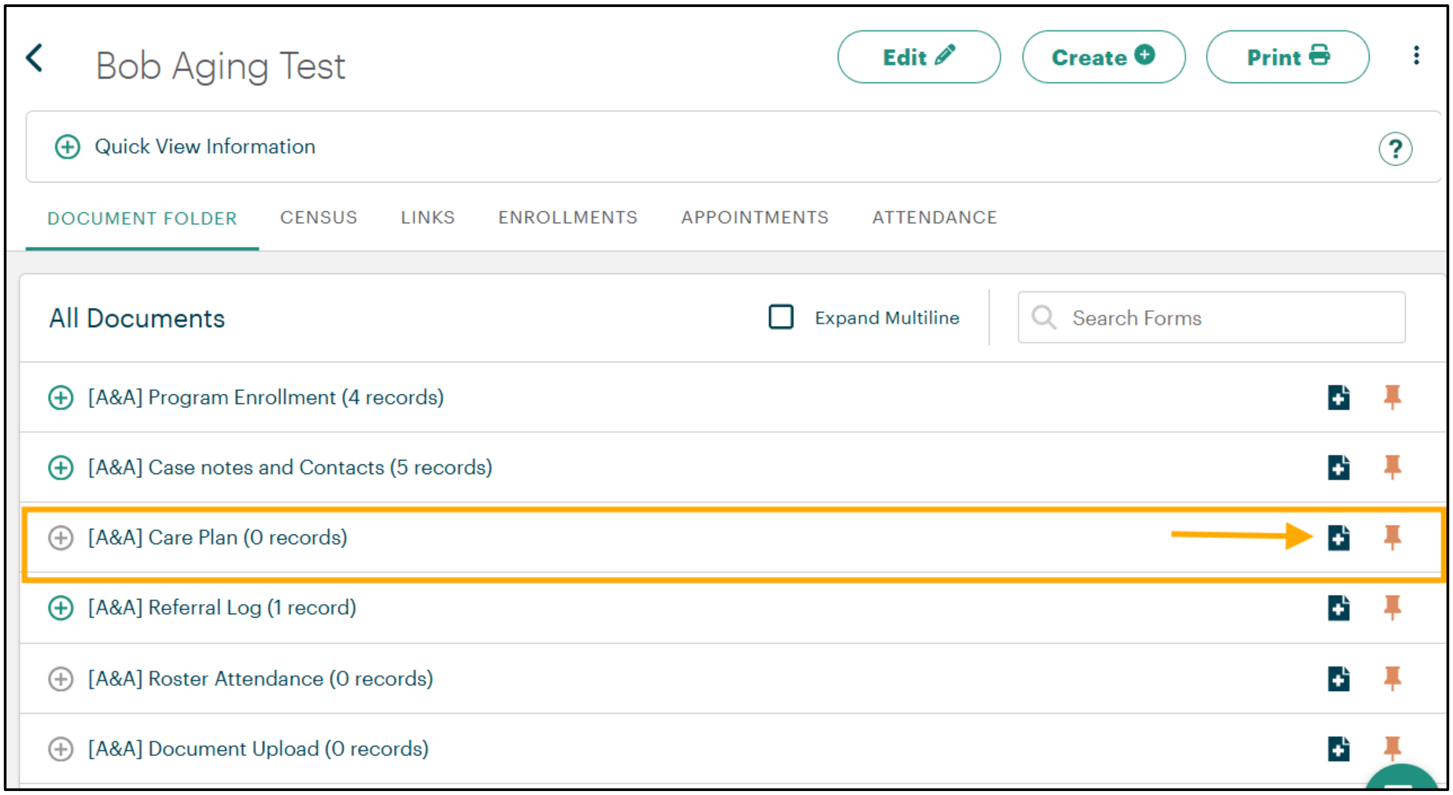


Creating Care Plan records

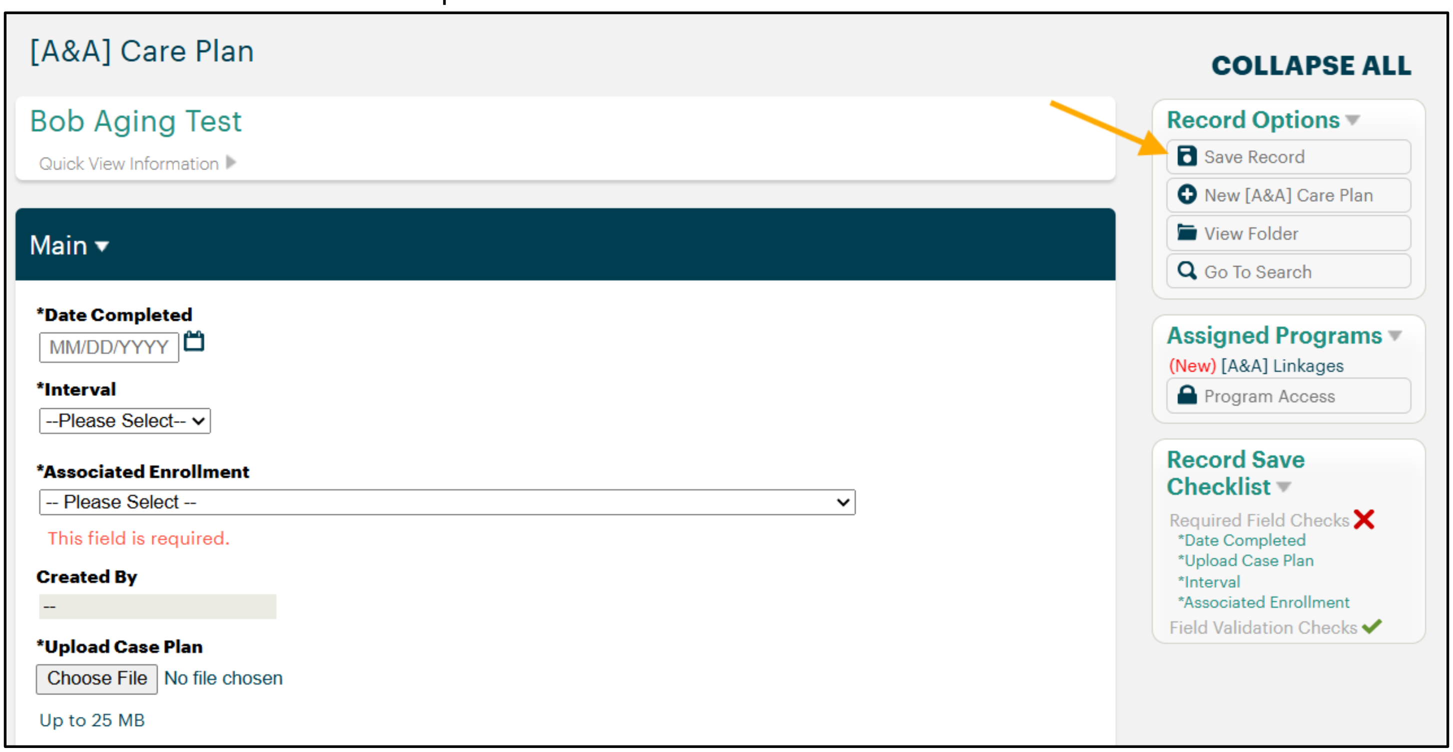
This form lives within the Participants document folder and should be completed for individuals enrolled in case management and ongoing core services programs. This is currently designed to upload an attachment of the care plan. (This will be built out further in post-live iterations.)

Steps:

- Navigate to the Participant's Document Folder
  - Either:
    - If already on a record related to the Participant, select “View Folder” from the “Record Options” menu on the right side.
    - From the left “Search Records” menu, search for Participants record and click into any cell that does not have green/mint text
- Find the “Care Plan” document type and select the black paper plus sign to the right to create a new record.



- Complete all required fields and applicable optional fields.
- Save the record once complete.



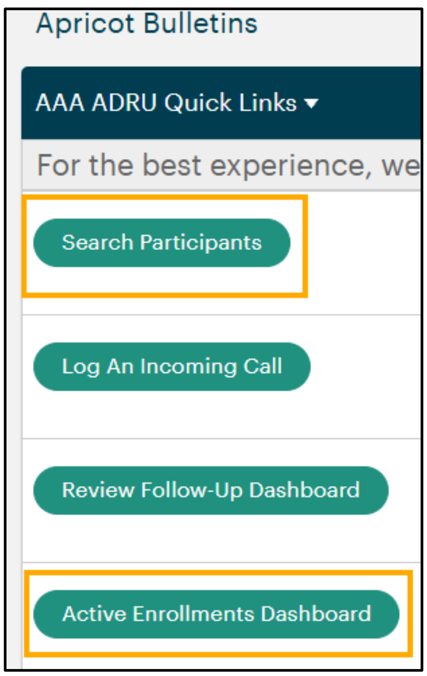
How to Enter a New Service for an Existing Participant

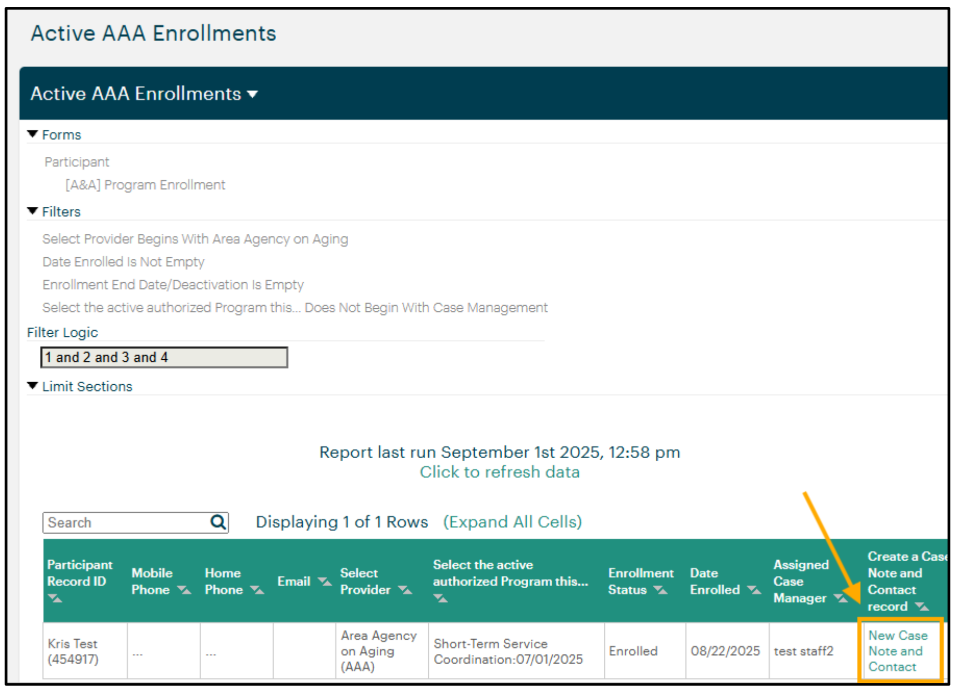
One-on-one activities can be tracked for Participants using the Case Notes and Contacts form. This tracks services tied to an enrollment OR it tracks services for the Enhanced Information and Assistance program (does not require an enrollment).

This should be used to log all Case notes, follow-ups, home visits, etc.

You can create a new Case Note and Contacts record by either:

- Searching for the Participant. Once you find the participant you are looking for, navigate to their document folder. If needed, review this section on how to search.
- Or from the Active Enrollments Dashboard report, which has a link to automatically create a Case Notes and Contacts record within the Participants document folder.



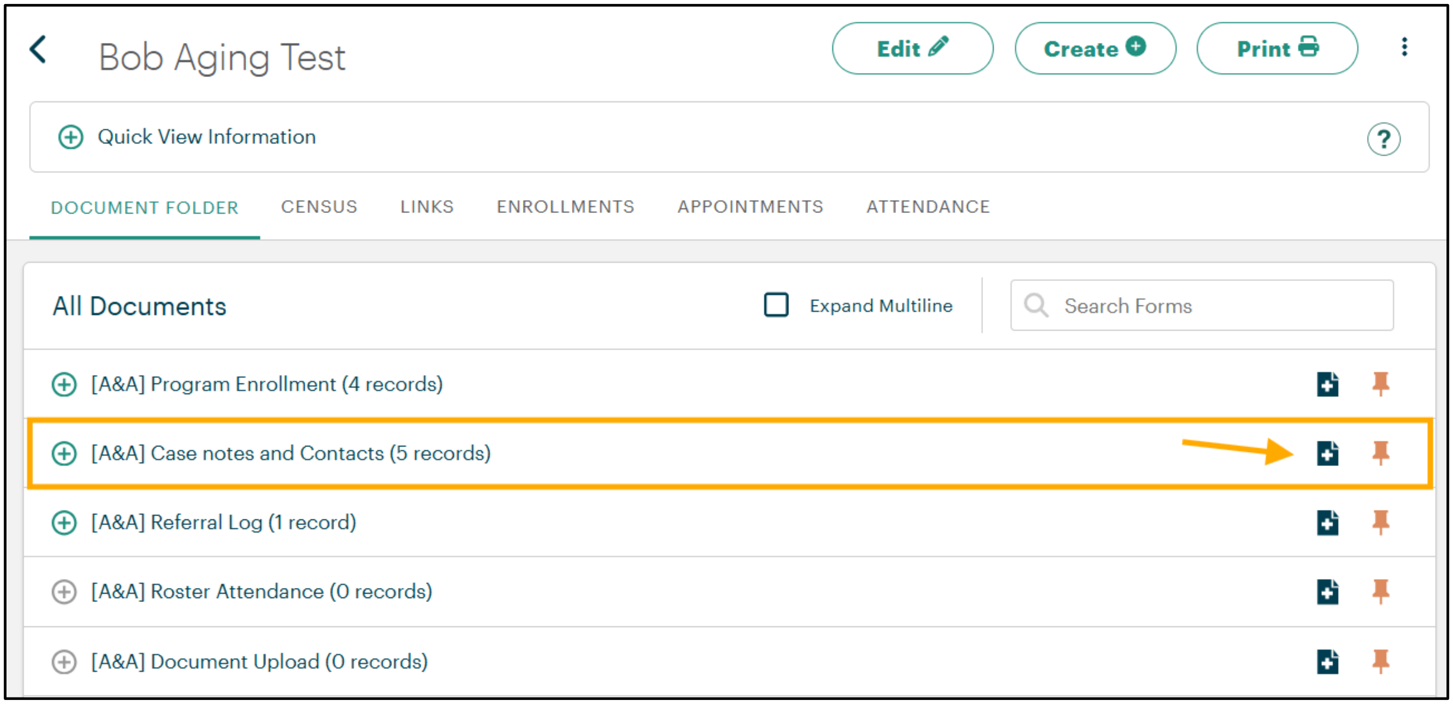


Considerations:

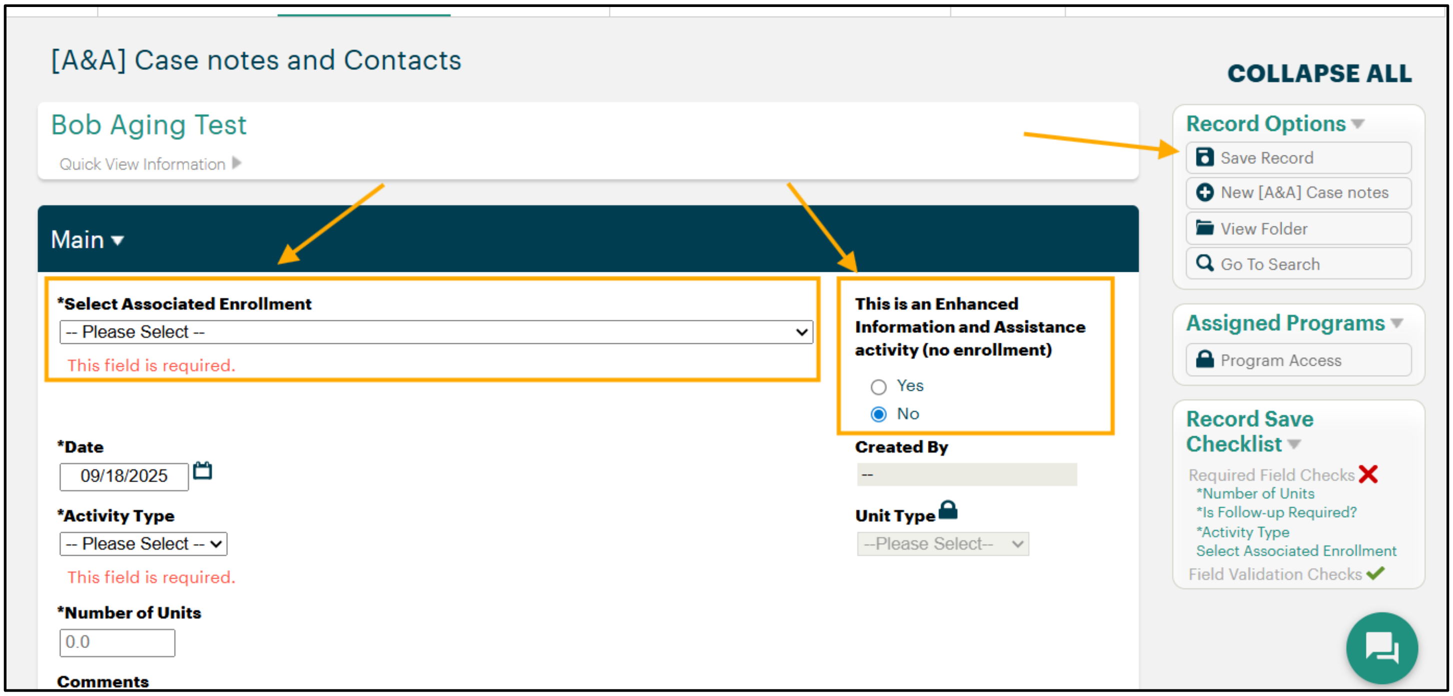
- The Activity Type dropdown options change based on if it's associated with a program enrollment or not.
  - If linked to an enrollment - The available dropdown options for the Activity Type field will pull from the Services Directory values linked to the Provider Authorized Program and Services record that the participant's Program Enrollment is associated with.
- If follow-up is required, the Follow-up date will be required, and a date completed field will be available to enter later.
  - These records will then be available for review in the Follow-ups required report dashboard
- If you need to log outbound referrals, a link will appear to create a record for each referral made
- If the Activity Type is a follow-up or outgoing call, the Select Topics field will appear

Steps:

- Navigate to the Participant's Document Folder
  - Either:
    - If already on a record related to the Participant, select "View Folder" from the "Record Options" menu on the right side.
    - From the left "Search Records" menu, search for Participants record and click into any cell that does not have green/mint text
- Find the "A&A Case Notes and Contacts" document type and select the black paper plus sign to the right to create a new record.



- Complete all required fields and applicable optional fields.
  - If the activity is associated with an enrollment (typically Case Management or a Core Service), you will use the "Select Associated Enrollment" dropdown to link to the pertinent enrollment. This will drive what values are then available in the Activity Type field to select from.
    - Alternatively, if this is for Enhanced Information and Assistance, you may use the button on the right to indicate that is what this is for (mark "Yes" for "this is an enhanced information and assistance activity (no enrollment)" and that will provide values in the Activity Type field based on the current EIRS provider authorized program and services record.
    - Note- if you selected an enrollment and then determined it should be an EIRS activity instead, you will need to refresh the screen to clear the setting that was associated with the enrollment that was selected- this impacts the activity types available to pick from.



- Save the record once complete.

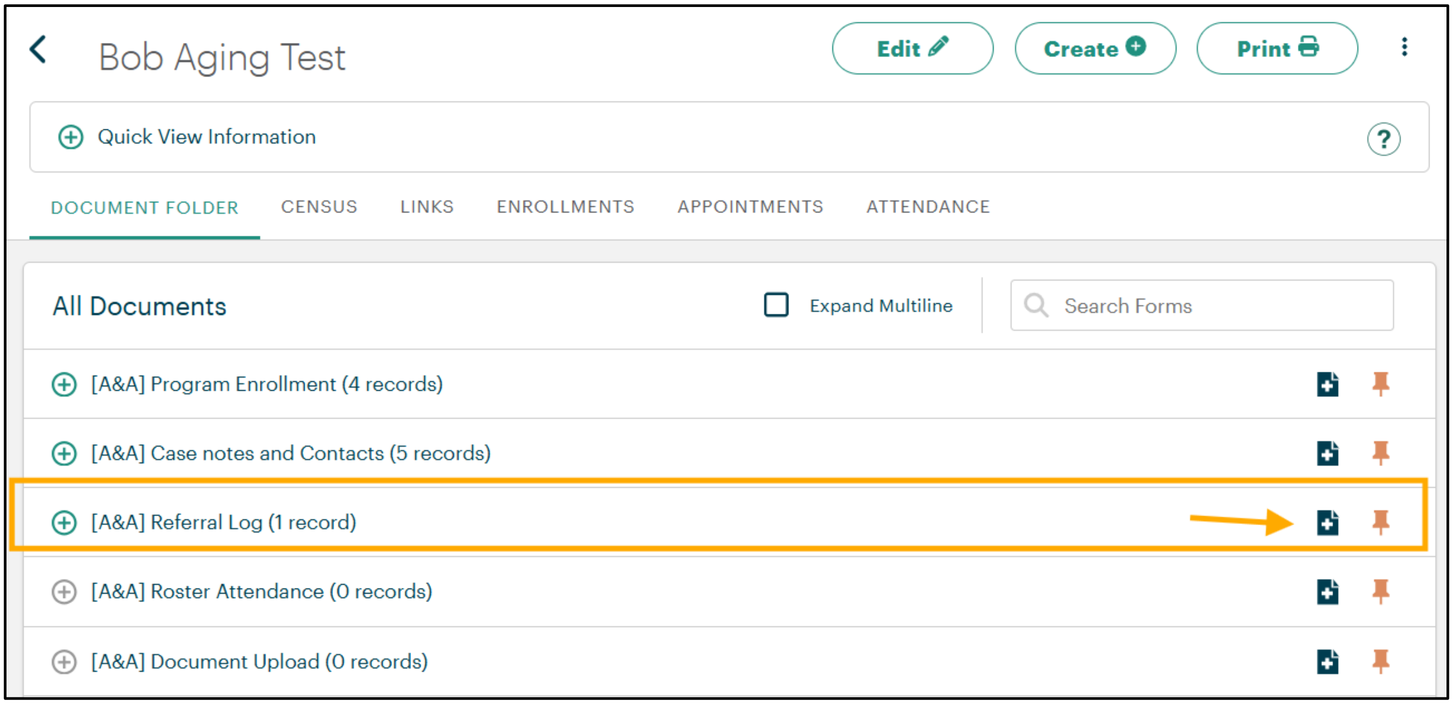
Creating Referral Log records

This form lives within the Participants document folder and can be completed from either the Document Folder, or from within a Case Notes and Contacts record.

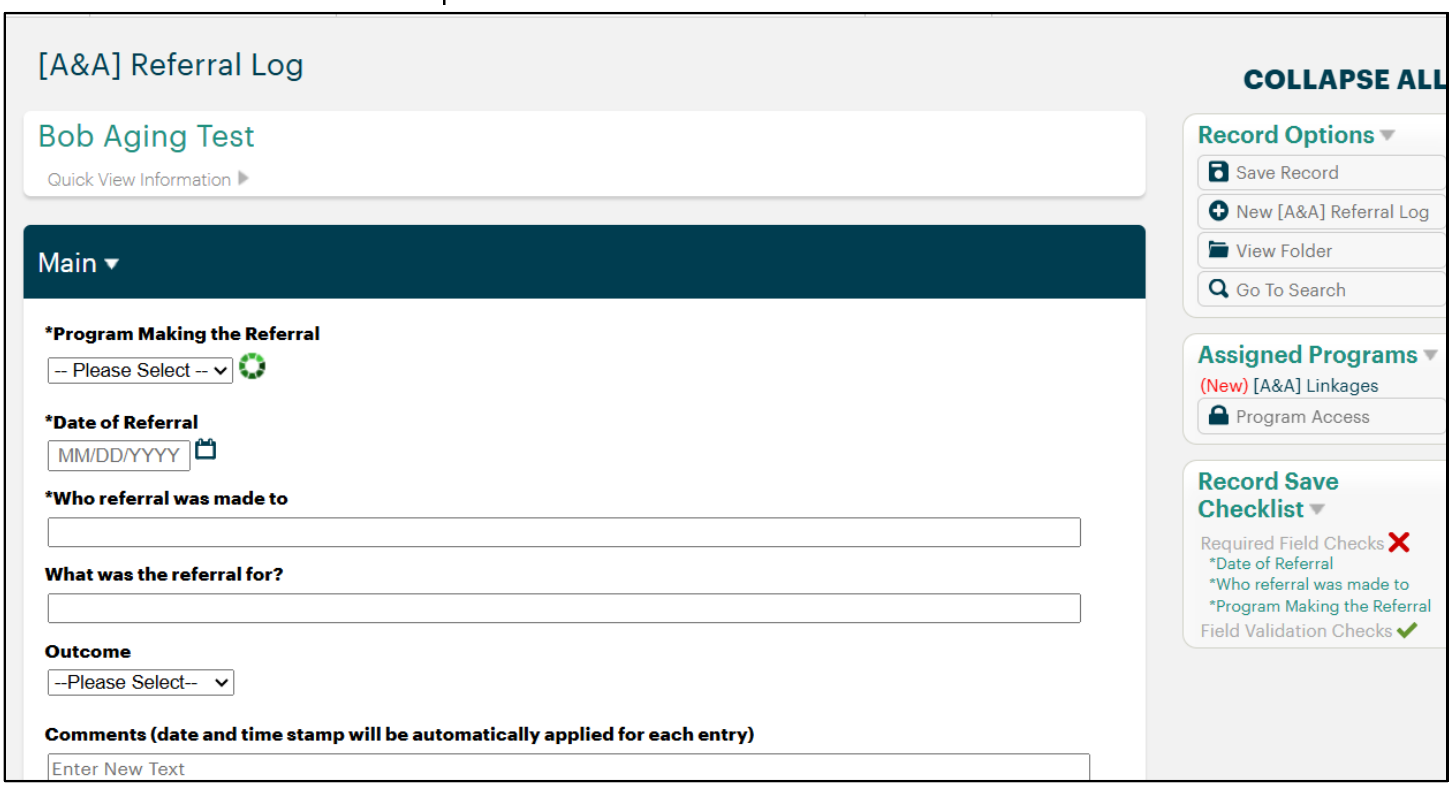
This does not replace the UCM system used to manage referrals. This is just to track high-level information about the types of referrals being made out for participants.

Steps:

- Navigate to the Participant's Document Folder
  - Either:
    - If already on a record related to the Participant, select “View Folder” from the “Record Options” menu on the right side.
    - From the left “Search Records” menu, search for Participants record and click into any cell that does not have green/mint text
- Find the “Referral Log” document type and select the black paper plus sign to the right to create a new record.



- Complete all required fields and applicable optional fields.
- Save the record once complete.

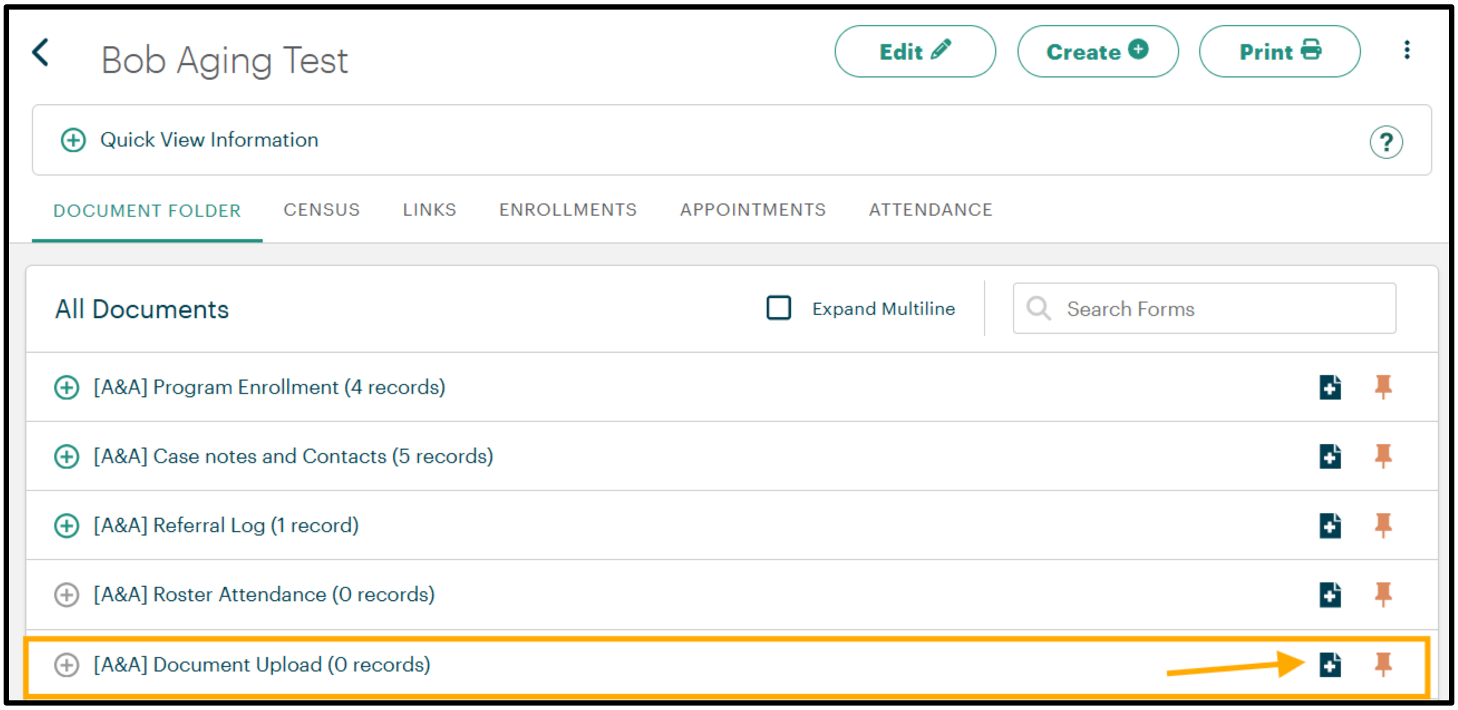


Creating Document Upload records

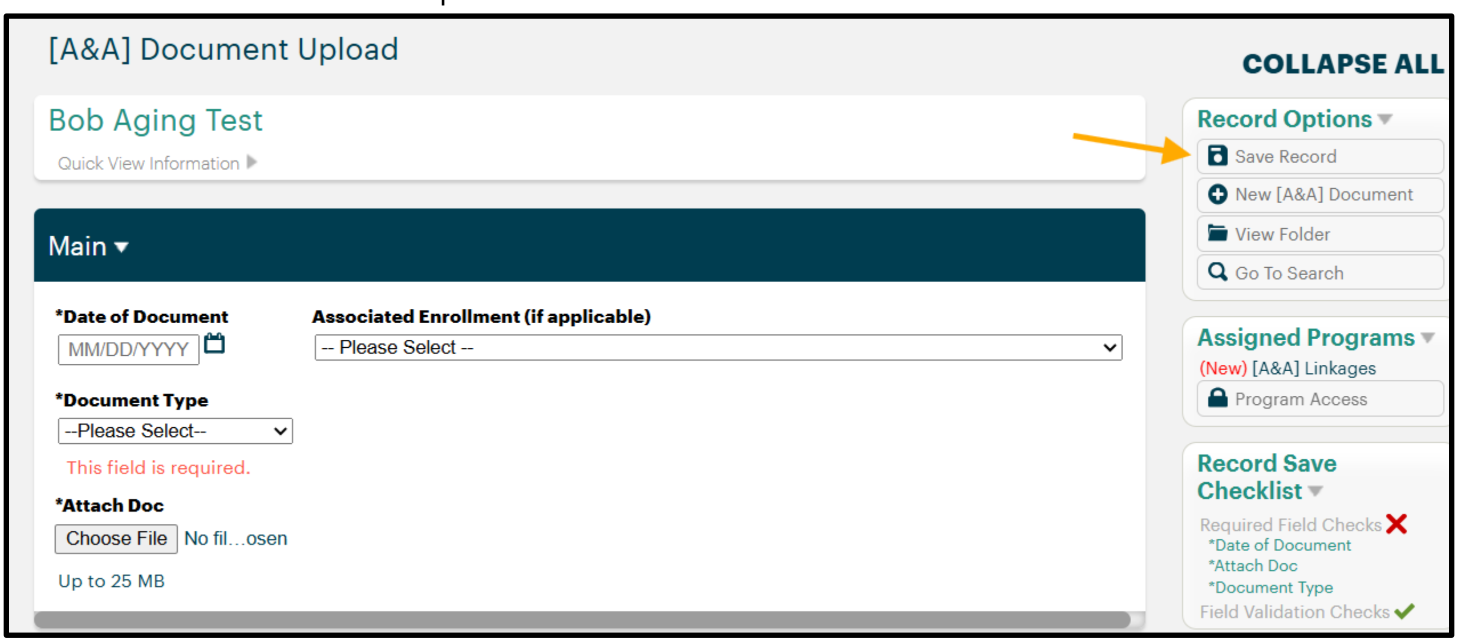
This form lives within the Participants document folder and can be completed from the Document Folder. This is used to upload attachments for the Participant as needed. Information in the attachments cannot be pulled into reports (only the fields on the form itself can.).

Steps:

- Navigate to the Participant's Document Folder
    - Either:
        - If already on a record related to the Participant, select “View Folder” from the “Record Options” menu on the right side.
        - From the left “Search Records” menu, search for Participants record and click into any cell that does not have green/mint text
- Find the “Document Upload” document type and select the black paper plus sign to the right to create a new record.



- Complete all required fields and applicable optional fields.
- Save the record once complete.

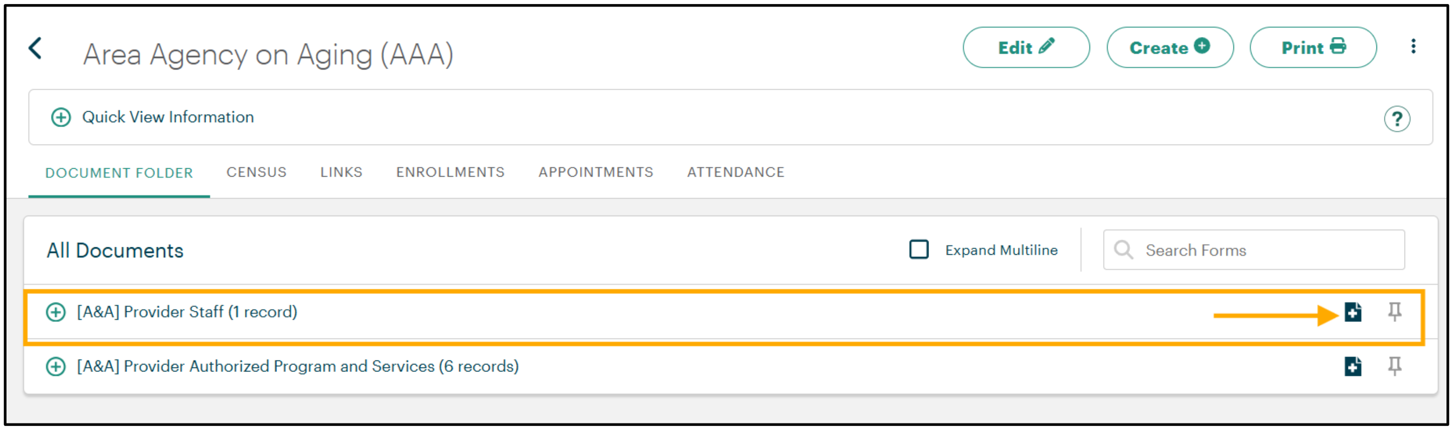


Provider Staff record

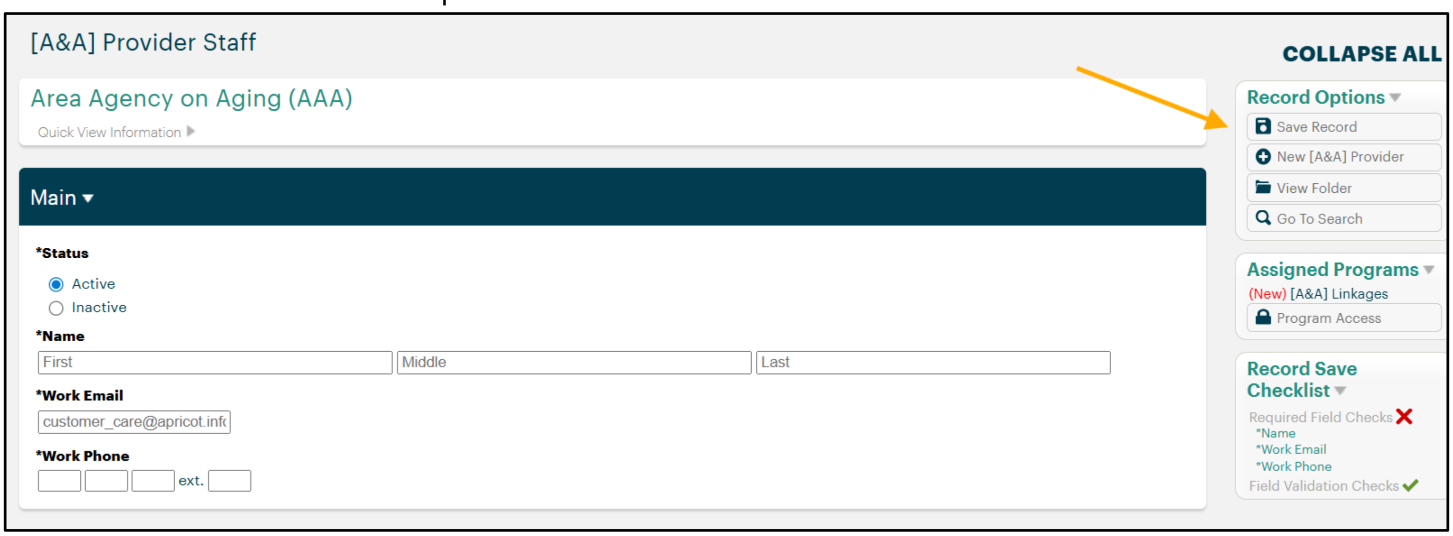
This is used to track a record for each staff member for a provider that are delivering services. These will be available in dropdowns on the Program Enrollment form for the assigned worker, and is used in email triggers.

Steps:

- From the left "Hidden Records" menu, search for Provider Directory records.
    - Access the providers document folder.
        - Click the plus sign to add a Provider Staff record, or open an existing record if you need to make edits.



- Complete all required fields and applicable optional fields.
- Save the record once complete.



Frequently Asked Questions (FAQs)

1) How will I know if I have an Apricot user account?
   You will receive an email from the Apricot system OR you will be notified by an SOMS system administrator of your new account.

2) My password token is invalid, what do I do?

Please use Forgot Password button on login screen
https://apricot.socialsolutions.com/

3) What do we do if we are not collecting the required information on the participant profile?
   There are options for “unknown” if needed. Further, review the [A&A] Demographics form for additional data points being captured for all A&A participants.
   If additional information is required, please submit a support request for review.

4) If I see a duplicate warning and submit a ticket, how long will it take to resolve?
   The team will receive an email immediately; we aspire to resolve service requests within 1 business day. Providers will be able to enter services for the participant after access is granted.