Data Entry Guide
Apricot 360
Lake County-Update March 2021

Contents

Lake County HMIS

This instruction manual has been created as a guide for basic Apricot 360 Homeless Management Information System (HMIS) User data entry. The steps described herein include a basic HUD data entry process as well as providing an example of local customization. There may be occasions where your agencies have many different types of projects that will utilize a modified data collection and entry process. Your HMIS Agency Administrator will be the information source for those instances.

This guide is intended to acquaint users with basic navigation and entry processes of the Apricot 360 HMIS platform and adheres to information contained the most current version of the HUD HMIS Data Manual.

Glossary

Frequently Used Terms	**Definition**
Continuum of Care (CoC)	A community-wide volunteer, non-legal entity charged with promoting access to homeless services and assuring the best utilization of mainstream government funded homeless service programs. The CoC is also charged with working to optimize self-sufficiency among households experiencing homelessness.
Custom	Locally created assessments, forms and reports that enhance the management of the CoC's homeless system of care
Document Folder	A screen in Apricot that lists all types of service activity for a client such as HMIS Enrollments, client contact records, housing readiness documents, service records etc.
HMIS Administrator	the HMIS Administrator may be one or several staff persons who work for the HMIS Lead to administer the system. Aka, the 'Admin', that person or team is responsible for administering user training, monitoring data quality, being the subject matter expert for HUD HMIS regulatory and sub-regulatory guidance and assisting participating agencies to generate mandated compliance reporting
HMIS Data Manual	A technical document created to guide HMIS end users and administrators in regard to data collection and entry. Guidance is updated every other year and includes instructions from various federal partners such as Health and Human Services and the Veteran's Administration. Program sources collected in an HMIS include HOPWA, RHY, RHSAP, GPD, SSVF and PATH
HMIS Lead	An entity designated by the Continuum of Care to manage the HMIS to its highest and best local use
HMIS Participation	Number of homeless service agencies and programs available in the CoC region that collect and enter data into the HMIS. The participation rate is the number actively engaging in the HMIS divided by the total number of service agencies (including volunteer and faith-based groups)
HUD	Federal Department of Housing and Urban Development
Linking	Different assessments/forms may follow a prescribed workflow by linking different types of Apricot forms in a chronological progressions
Permissions	Granular settings that govern specific assessments, forms, reports and bulletins an HMIS user may have access to view, create, edit or archive
Project Type	
Record	A record is a collection of similarly typed database fields and in a spreadsheet are represented as Rows. For example a Client records contains field information about a person that typically will not change such as their name, date of birth, SSN, race and ethnicity. An enrollment record contains information about a particular instance of an enrollment such as the client's start date, end date, data collection stage and household relationship to that enrollment.
Record ID	A unique numerical identifier databases use to uniquely identify and link different types of Records together (i.e. Programs to Sites, Assessments to Clients etc)

Site/Program	Site equates to a nonprofit agency or local government business unit; programs are individually funded projects related to each Site
Workflow	A series of process steps to be followed for different types of data entry actions in the HMIS

Version History (this document)

Version 2.0	March 31, 2021	Guide updated to reflect new workflows, assessments and customizations added
Version 1.0	June 30, 2020	Guide released with basic screen shots and data entry steps

Logging In

After HMIS training you will receive your temporary login credentials to the Lake "live" site from HCD. You will need to create a new permanent password. Passwords must:

- be at least five (5) characters
- contain at least one number 0 through 9
- contain at least one non-alphanumeric character
- contain no spaces

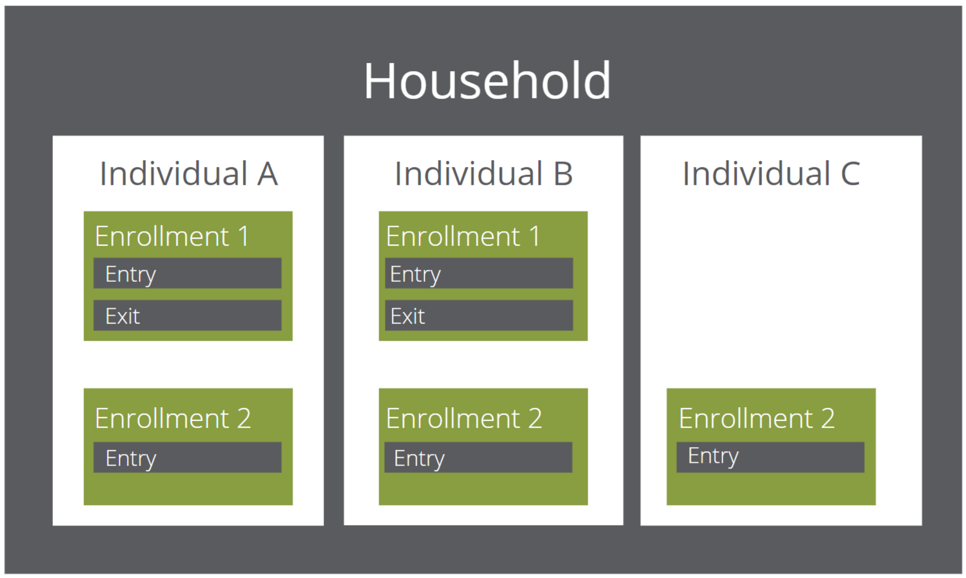
Note: Must be of a strength of medium or higher. Therefore, passwords cannot contain words such as "password" or "test" as these are considered of a low strength

Passwords in Apricot 360 are set to expire every 45 days due to inactivity. Lake County Behavioral Health will notify the community if that date maximum changes.

To obtain a new login, email Melissa.Kopf@lakecountyca.gov. Passwords for the "Lake Train" site are open for after-hours access using the credentials you received in training.
The Lake Train Sandbox site is located at: https://apricot.socialsolutions.com/auth

Note About Management Information Systems

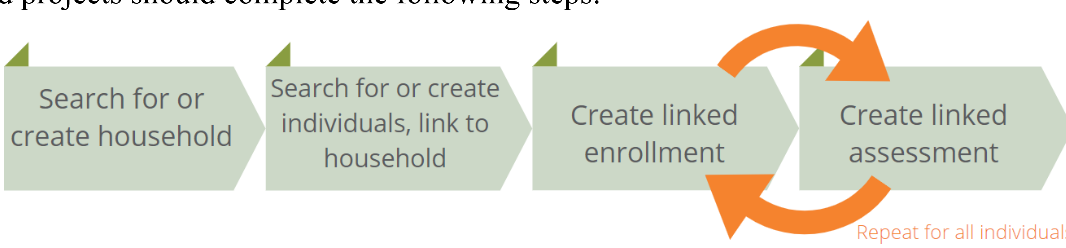
The value of an information system such as Apricot 360 versus using a basic spreadsheet is the system's ability to track the relationship between different types of data. In Apricot 360, these relationships are referred to as "Links." There are many different types of data that will be tracked, but to illustrate this point observe the diagram below. A single household has 3 individuals linked to it, 5 project enrollments and 7 assessments. This household's structure is further complicated by the fact that the household composition changes, adding a third member (perhaps the birth of a child or the development of a new relationship) in the second enrollment. These real-world changes are why we rely on a complex system for tracking and evaluating these changes.



Workflow Example

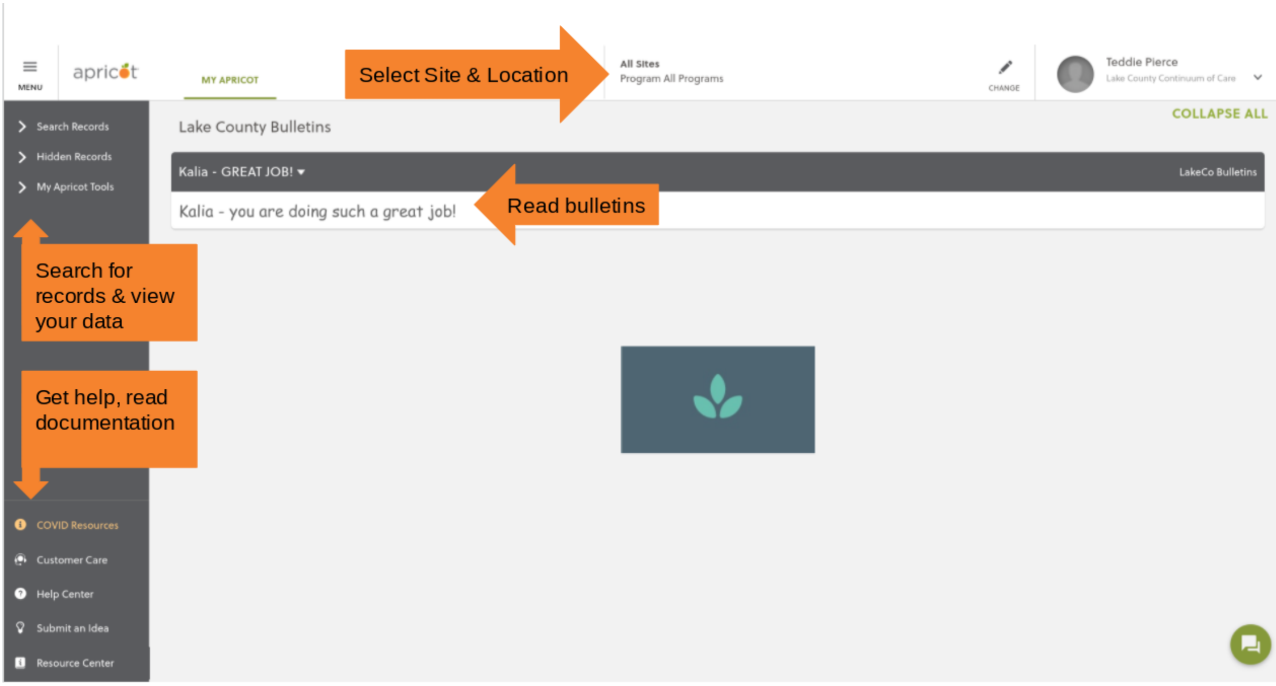
A workflow defines which steps are to be taken, and the order they are taken in. This manual focuses on most projects in your Homeless Response System which follow the order in the graphic below. However, you should check with your HMIS administrator to understand the workflow you need to complete for the projects you are working with because there are exceptions.

Standard projects should complete the following steps:



Home Screen

Once you login to Apricot 360 the home screen will present. Below are some of the key pieces of the home screen which you should familiarize yourself with.



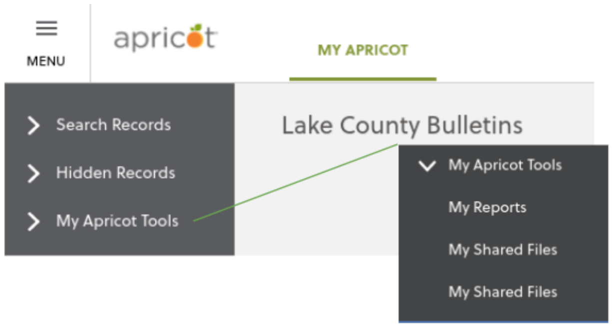
Select a Site and Program

Before entering data, users must select the site and project they wish to enter data for. To select a site and project, click the , scroll down until you see the project you wish to select.

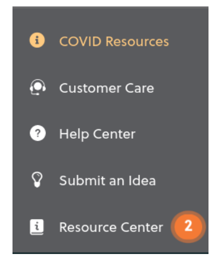
Note: users should see only the Sites/Programs listed that they have been granted access to via the Permissions functionality by the HMIS Administrator.

Search for Records & View Your Data

The primary navigation menu is located in the upper left corner of the screen. Users are able to utilize this menu to search for records, view hidden records and access My Apricot Tools including the library of canned reports.



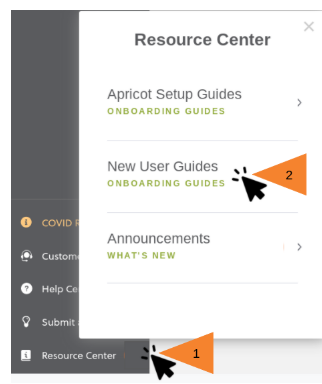
Get Help and Read Documentation



On the bottom portion of the left-hand navigation pane, you can access additional resources. These resources include time limited or situational information such as those for systematic response to the current pandemic caused by the novel coronavirus, COVID-19 and non-time limited resources such as Customer Care, Help Center, Submit and Idea and the Resource Center.

Resetting Your Password

The Resource Center also allows you to reset your password by selecting Resource Center → New User Guides → Resetting Your Password.



About Workflows

Workflows are a sequence of processes through which a piece of work passes from start to finish. All software platforms have workflows and an HMIS may have common workflows determined by HUD or the State of California, but a CoC may conceive of and create its own unique workflows that incorporate data collection for locally determined needs.

Most funded projects in the Lake County Continuum of Care will adhere to a full or native HUD HMIS workflow. Some projects will complete an additional custom workflow in addition to the core HUD requirements. Important Note – HMIS Users should have a clear understanding of HUD Data Collection States per the most current [HMIS Data Standards (aka HMIS User Manual)](). All HMIS Users should plan a thorough review of the standards every time HUD provides and update. Contact the Lake County HMIS Administrator for details.

Workflows for each project type shall be first be determined by the terms of the primary funding source (i.e. State of CA) and from there additional expectations at a local level.

Local funding agreements(contracts) shall adhere and expose both the primary funding instructions received from the Federal or State funding sources and any additional data collection expectations. Identified contract administrators in Lake County are the key information source for the terms of an HMIS projects data collection and entry rules.

HMIS Full Workflow

A full or native HMIS workflow will complete the following process steps and assessment Apricot 360 forms (detailed completion steps further in document).

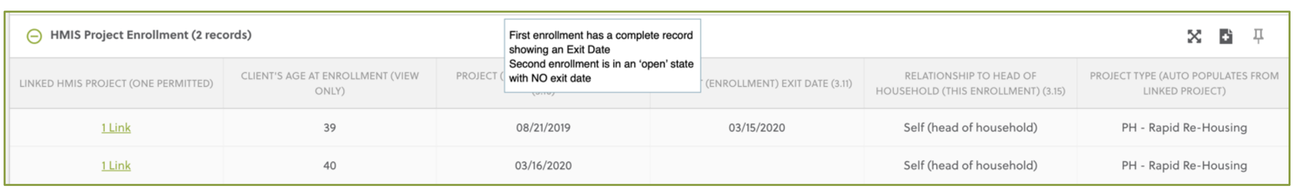
Quick Steps:

1. Search or Add Client – Search Records, if Client not located, Add a new Client
2. Add/Confirm Household – Households of more than one person and every single individual MUST have a household record with relationship of Self Head of Household. For multi-person households there must be at least one individual assigned a relationship of **Self Head of Household**.
3. Program Enrollment – once a client is selected, navigate to there he Document Folder
4. Add HMIS Assessments (March 2021 there are two separate assessments, but Vendor working on combining into one)

Disabilities and 3.917 – one each for the data collection stage of Entry and one for Exit
Health Insurance, Income and Non-cash Benefits - one each for the data collection stage of Entry and one for Exit

Note, that each data collection stage is typically completed one at a time. For instance, a client is enrolled in a shelter program on March 1st, so the Enrollment header, and HMIS Assessments align with the Entry data collection stage. At a later date when the client exits the program, an Exit Date is entered in the Program Enrollment Header and another set of HMIS Assessments are added with the Information Date in each form being the same as the Exit Date.

Client Document Folder


HMIS Project Enrollment (2 records)

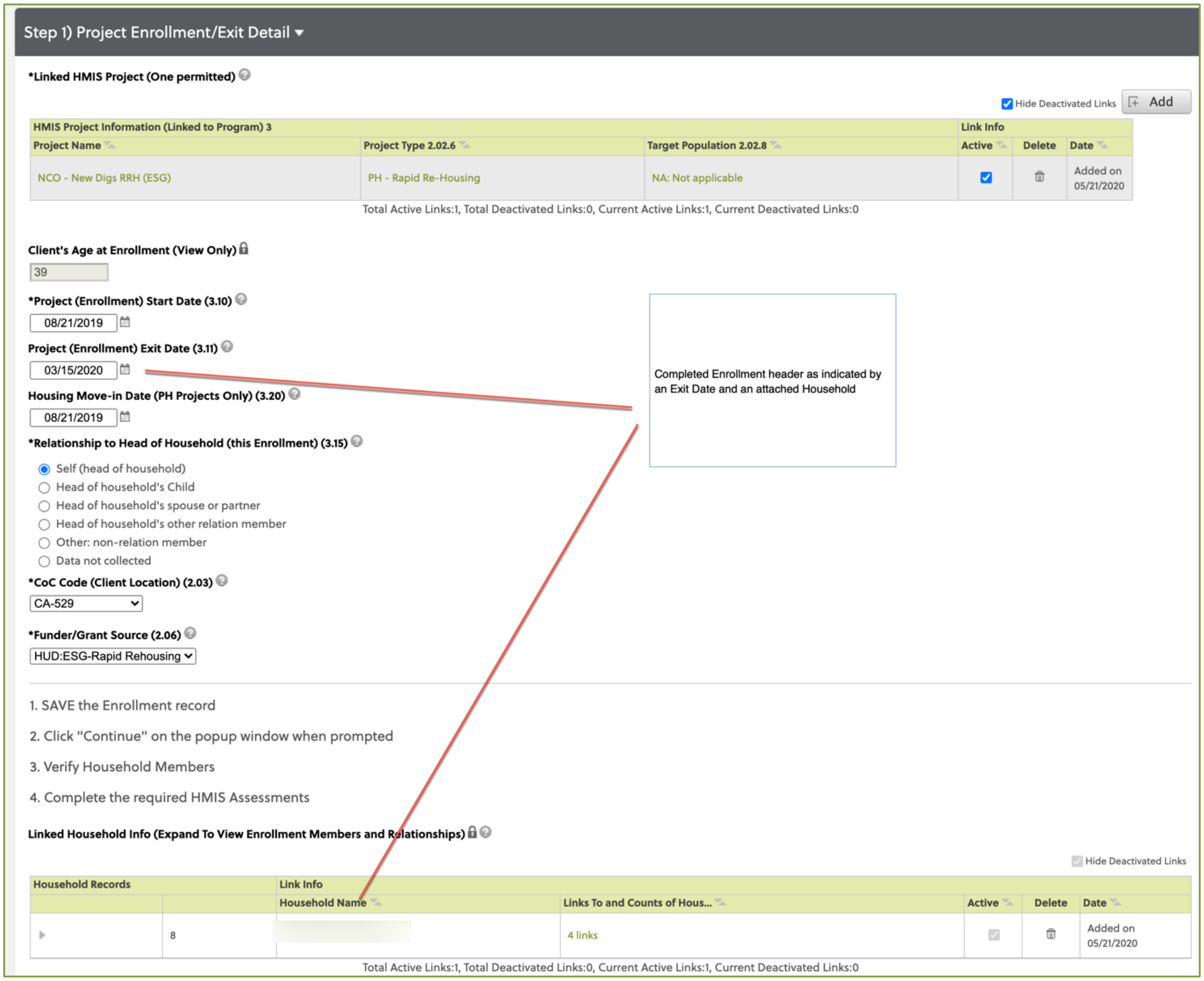
LINKED HMIS PROJECT (ONE PERMITTED)	CLIENT'S AGE AT ENROLLMENT (VIEW ONLY)	PROJECT (	(ENROLLMENT) EXIT DATE (3.11)	RELATIONSHIP TO HEAD OF HOUSEHOLD (THIS ENROLLMENT) (3.15)	PROJECT TYPE (AUTO POPULATES FROM LINKED PROJECT)
1 Link	39	08/21/2019	03/15/2020	Self (head of household)	PH - Rapid Re-Housing
1 Link	40	03/16/2020		Self (head of household)	PH - Rapid Re-Housing

Program Enrollment Header

(Note the following screen shots reflect a fully completed HMIS Enrollment record

- **Linked Project**
- **Enrollment and Exit Dates**
- **Client's relationship to this Enrollment**

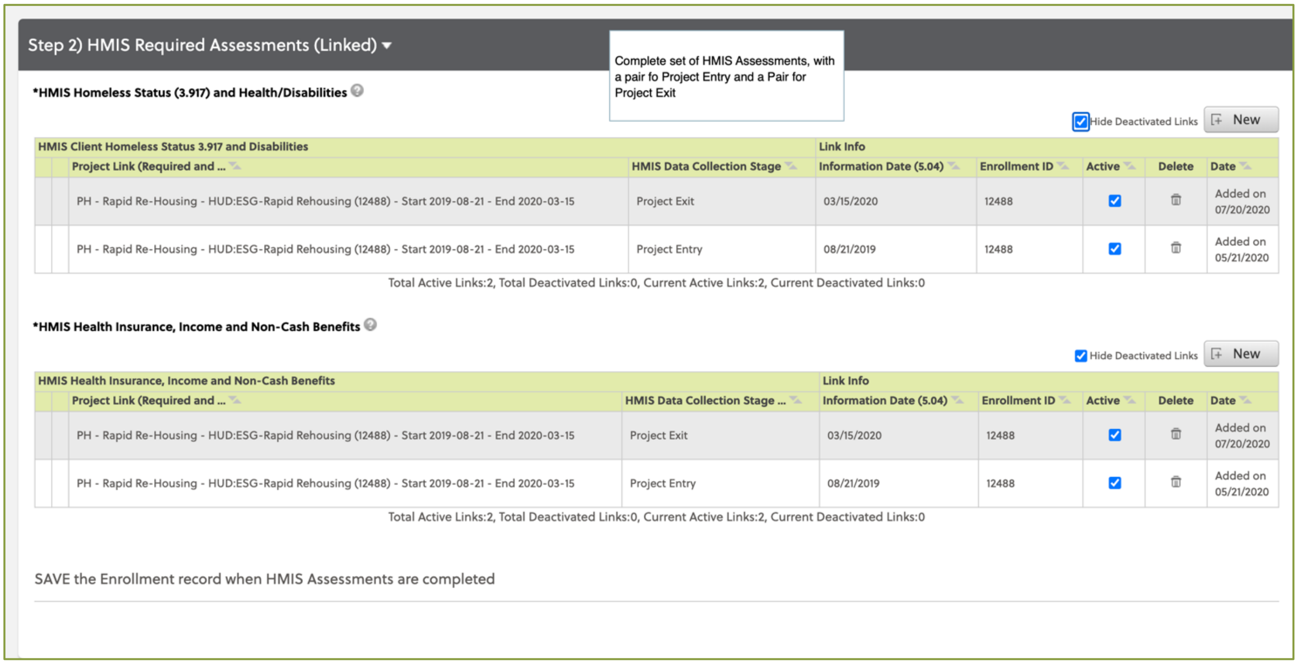
- **Subform showing the Household**



HMIS Required Assessments

(Note the following screen shot reflects a fully completed HMIS Assessment requirement)

- **Enrollment ID column is the same number for all rows**
- **Information Dates match the Entry and Exit dates in the Enrollment header**
    - **HMIS Homeless Status (3.917) and Health/Disabilities (both entry and exit completed and saved)**
    - **HMIS Health Insurance, Income and Non-Cash Benefits (both entry and exit completed and saved)**



HMIS Custom Workflows

HMIS platforms are generally designed off of existing software platforms that have earlier roots in the nonprofit service or healthcare world. Some HMIS' are more configurable than others and Apricot 360 is one of the most customizable software systems available.

The CoC can use the custom form and workflow rules features to create tracking and reporting for local use. In a case where reporting mandates do not specify a particular report of format, a customization can be considered that creates less of a user burden.

One of HUD's strongest desires is to have as many programs serving local homeless persons participating in the HMIS as possible, this is not dependent on funding types. Custom data entry flows and forms can attract non-federal or state program services to enter their data which builds a better system-wide picture of homeless in a CoC region.

Custom forms and data flows may be linked through Apricot's workflow rule feature before, during or after the HUD processes. Custom forms may also be designed and completed completely outside the HUD workflow, meaning a certain project may not need to complete the program enrollment steps. The Lake County HMIS Administrator will advise agencies around the workflows needed for each project's setup.

Examples can include warming centers, safe parking, food distribution sites and more that may be funded with flex or general funds.

Current custom assessments/form created and populated in the Lake County Apricot HMIS include:

Client Contacts – tracks different contacts a client may have such as parent, sibling, housing navigator

Client Documentation – tracks various pieces of documentation a client may need to become housing ready
ESG-COVID – HUD recommended C19 diagnosis and vaccination tracking
HEAP Service Payments – service payment custom form
Lake County PIT (Imported) – Point in Time clients imported to the HMIS who were not previously in the system
Warming Center Participants – a simple roster of clients presenting for assistance at the Warming Center in 2019

Custom forms may have reports created or specific data elements pulled for the data they collect but if they are completed individually, will not generate the standard compliance reports such as the CAPER or APR.

Functionality Detailed

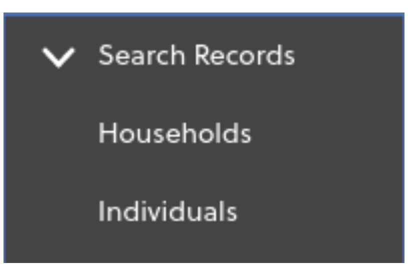
Login – Home Screen (Dashboard)

The Home Screen section of this manual provides a look at how that screen appeared when Apricot was new, the screen show below shows how that screen has been developed. Key elements of the screen are as follows:

Top Menu – Menu stack (open/close navigation, Site/Program selection, User Account Information)
User Navigation Menu (left vertical black bar)
Bulletins – Announcements created and maintained by HMIS Administrators Upcoming Site Dashboard – Custom reports and/or data pulls that may be created and attached by HMIS Administrators

Search Records

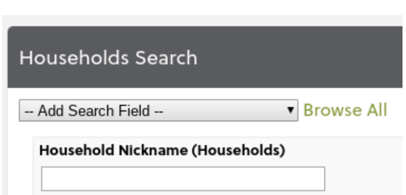
One of the first things you will most often do after logging into Apricot 360 is to search for a Client or Household record. After clicking on Search Records on the left nav area, the navigation menu on the left side of the screen (pictured above) allows you to specify if you are searching for an individual or a household level record.



Households

Households are organized by the name of the head of household as determined the first time a household presents for services.

Tip: If the household you are looking for is not found in your initial search, try using the names of other adults in the household.



To locate an existing household record, click 'Households' on the left navigation menu. The default search option that appears will allow you to search by the Household Nickname. You can also choose to search by Record ID, or Creation Date.

Tip: Notice that as you enter information, the information system immediately begins searching and records which are not an exact match are eliminated. If you are unsure of the household nickname, you can enter a "%" which is known as a wild card. If all adults in the household share the same last name of "Johnson", but you are unsure who the head of household is, entering %Johnson will return all records with those letters in that order. Be sure to verify the Client Name, Social Security Number (SSN), and Date of Birth (DOB).

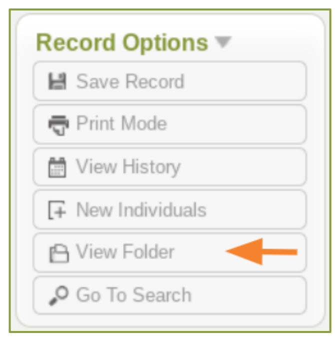
Individuals

To locate an existing individual record, click 'Individuals' on the left navigation menu. The default search option that appears will allow you to search by First, Middle and Last Name. You can also choose to search by Record ID, date of birth, gender and several other project enrollment focused elements such as enrollment start date, or assessment data such as 'Select Active or Recently Exited.' The search engine begins to narrow search results as you type into the search box.

Tip: The search engine is looking only for an exact match. To avoid missing a valid result, enter in partial information, such as the first two to three letters of the first and last name. If you enter a full name, such as "Joseph Johnson" you will miss a result if this person was created as "Joe Johnson," or if there was a typo and they were created as "Joseph Johnsen." When searching for a match, ensure they are the person you are looking for by comparing the date of birth and social security number.

Once you locate the correct individual, you may either scroll down and click on the Name to proceed to their demographic information, or if you generate a list with multiple results, you can use the column headers to sort the data.

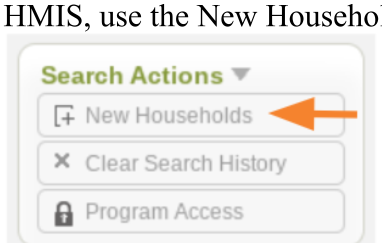
Clicking on the record will bring you to their demographics screen. To view the individual's other records, select 'view folder' from the right side of the screen.



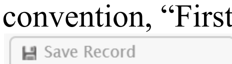
Households

Note: All Clients must be attached to a Household.

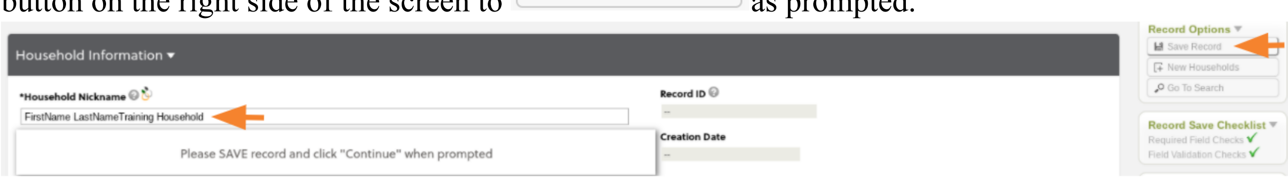
If after attempting to locate an existing Household you are certain that the household is not in the HMIS, use the New Household button in the upper right corner of the Search For Household screen.



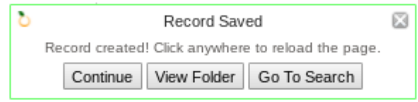
Creating a Household Record

From the Household screen, enter the name of the household using the first and last name of the head of household. Follow this naming convention, "FirstName LastName Household". Use the button on the right side of the screen to 

as prompted.



You will see confirmation that a record has been created. Select ‘Continue.’ The system will generate a Record ID and a timestamp for the Created Date.

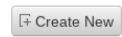


Link Individuals to Household

From the Household Screen, click the 

under “1. Link each member of the household” to add individuals to the household.

1. Begin by searching using the form displayed. If you find the individual you are looking for, you can click their name, and it will link this person to the household.
   Note: The person will not display on the Household from immediately. You must save the form to see the new member display.

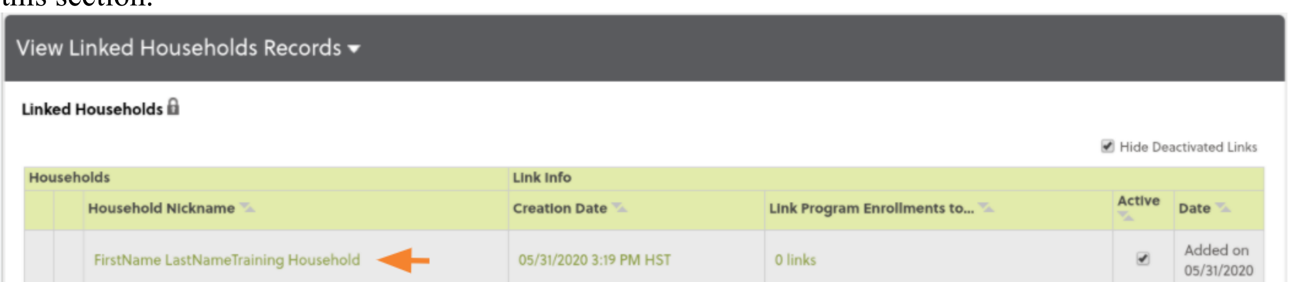
2. If the individual is not in the HMIS, you can create a new record by selecting, 

located in the upper right corner of the pop-up window. Follow the instructions in the next section to complete adding a new individual record.

When the information has been entered, select 

from the right side of the screen. You will receive a confirmation that the record has been created, click ‘Continue.’ The system will generate a Record ID, a timestamp for the Created Date and show the link between this individual and their household.

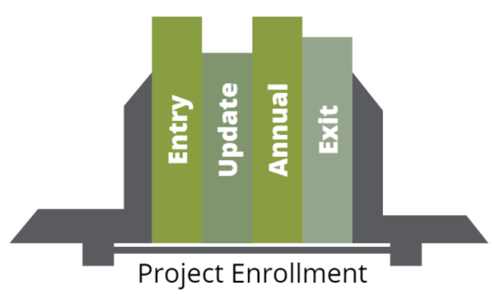
If you have additional members to add, click on the household name and repeat the steps outlined in this section.



Linking an Individual to a Project

What is a Project Enrollment?

A **project enrollment** is a container to hold all the information about an individual’s assessments that occur in the time they are participating in the project. On a bookshelf, the enrollment would be the bookends. Between them are the assessments grouped by data collection stages.



A **data collection stage** simply refers to when the data were collected and to what the data refer. For example, entry assessments are collected when an individual enters a project and describes their circumstances at entry: Where were they living? Do they have income? Do they have disabling conditions?

There are four types of data collection stages: Entry, Update, Annual and Exit. The section ‘Completing Assessments’ describes the role of these assessments and when to select each.

An enrollment can contain as few as a single data collection stage (if an individual has entered, been enrolled for less than a year, has had no changes since enrollment and has not yet exited). There is no maximum for the number of total data collection stages which can occur during an enrollment except there can be no more than one entry, and one exit. There will also only be one annual assessment for every 365 days a client is enrolled.

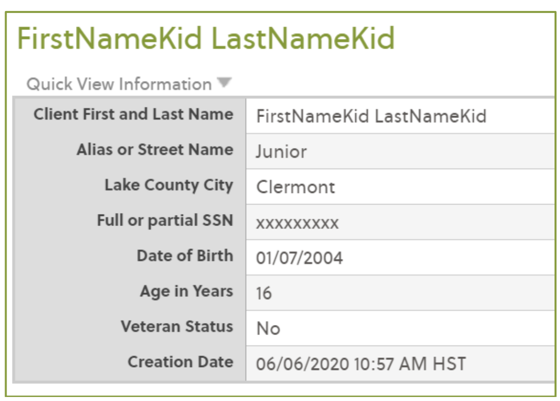
Creating the Project Enrollment

From the Individual Screen, select View Folder from the right-hand menu. You can view all data associated with this client from this screen. To view and link new enrollments, select ‘Links’ from the top of the screen

From the upper right corner, select ‘Create’ to link a new enrollment.

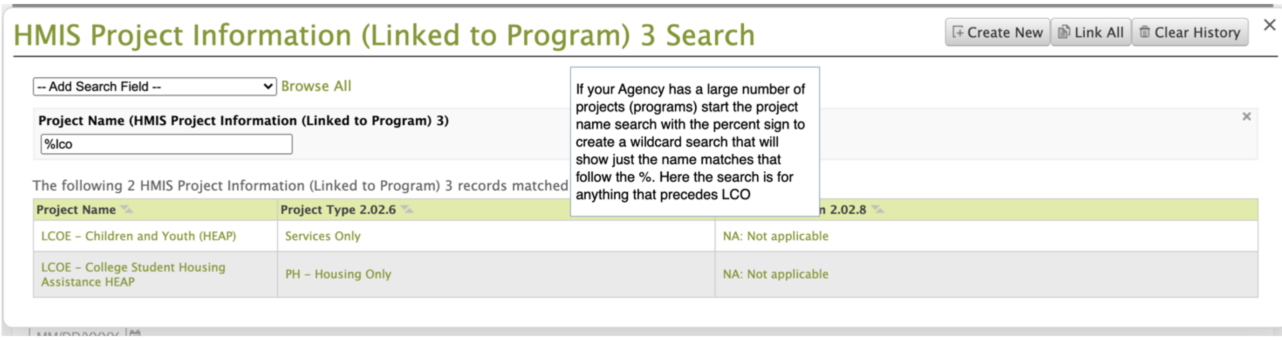
From the next screen, Document Selection, click ‘Program Enrollment’.

Tip: To view the individuals basic demographics from this form you can click Quick View Information located just below the header with the individual’s name. This can be helpful to ensure you are working on the correct HMIS record and to confirm the basic information for this person.



Client First and Last Name	FirstNameKid LastNameKid
Alias or Street Name	Junior
Lake County City	Clermont
Full or partial SSN	xxxxxxxxx
Date of Birth	01/07/2004
Age in Years	16
Veteran Status	No
Creation Date	06/06/2020 10:57 AM HST

Begin the new enrollment record by selecting New. Choose the project you want to enroll the individual in on the pop-up screen.



After making your selection, close the window and complete the form (do not fill in exit date). Click 

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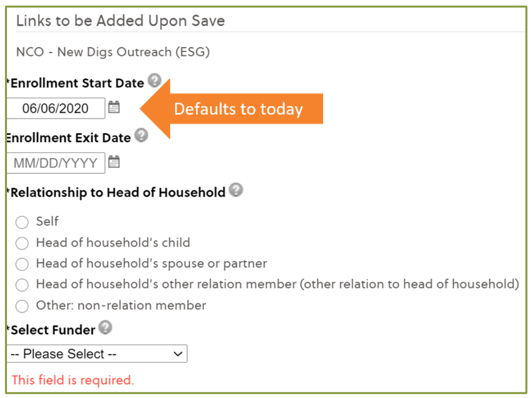
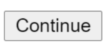


Once the form is saved, the individual has been enrolled. Proceed to complete assessments by clicking 

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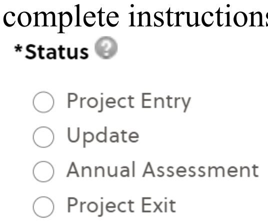
Completing Assessments

Now that the system knows when the individual started participating in the project based on the enrollment record, the system needs information about the individual's circumstances at entry, during the enrollment and at exit. These records are referred to as assessments. They are grouped into two categories, the HMIS assessment which collects data about their background, housing circumstances and history of homelessness and the Income, Non-Cash and Health Insurance Assessment.

Data Collection Stages

HUD projects mandate that data be collected in Stages – refer to the HMIS Data Manual for complete instructions on Data Collection stages for each project type.

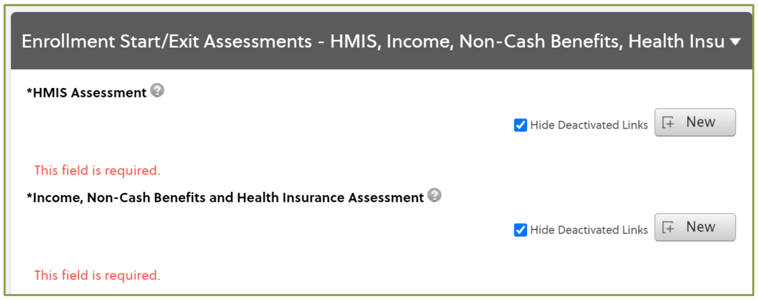


HMIS Assessment

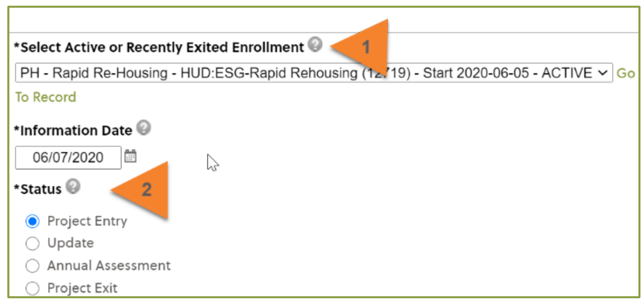
Scroll down to the header which begins with 'Enrollment Start/Exit Assessments'. Click 

under HMIS Assessment.

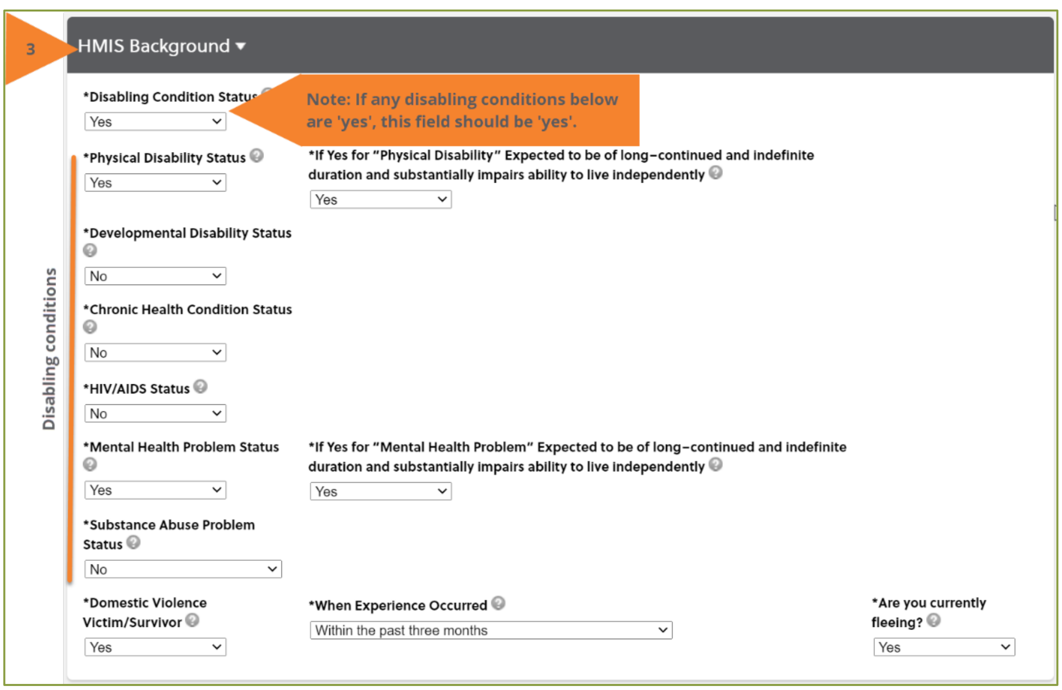
Tips: Fields which are required to save this form are marked with an asterisk (*). Date fields must include separators, also known as a forward slash (/).



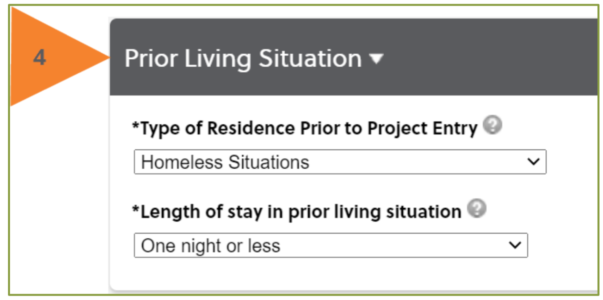
Click New to create and HMIS Assessment.



1. Select the project enrollment you want to create an assessment for. All active enrollments will be displayed in the dropdown menu so take care to select the correct one.
2. Select the data collection stage, referred to here as 'Status'.
3. Complete the HMIS Background section. If the individual has any disabling conditions (physical or developmental disability, chronic health condition, HIV/AIDs, mental health condition, substance abuse problem) the answer to the first question <u>must</u> be 'yes'.
   Tip: This section has questions that only show if questions are answered a certain way. This is why some responses result in additional questions populating.



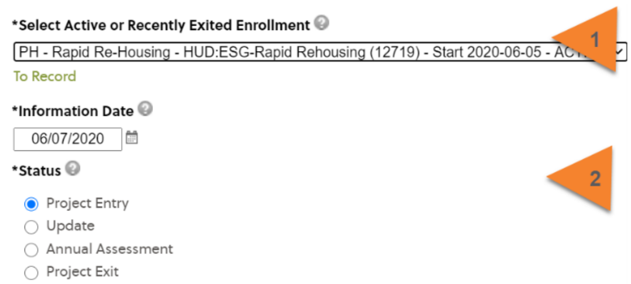
4. Complete the Prior Living Situation section. If you are unsure how to answer these questions, consult the HMIS Data Manual.
5. Click [Save Linked Record] to save the assessment record. You will be returned to the enrollment scree, so next proceed to the Income, Non-Cash and Health Insurance Assessment.



Income, Non-Cash, Health Insurance

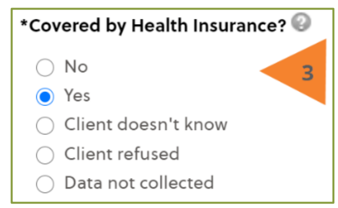
Click [New] to add a new Income and Benefits Assessment.

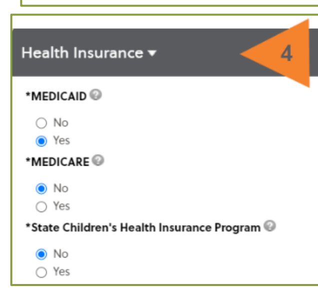
Tips: Fields which are required to save this form are marked with an asterisk (*). Date fields must include separators, also known as a forward slash (/).

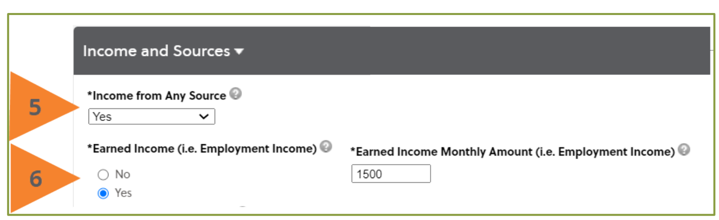


Adding Income Information

1. Select the project enrollment you want to create an assessment for. All active enrollments will be displayed in the dropdown menu so take care to select the correct one.
2. Select the data collection stage, referred to here as 'Status'.
3. Indicate if the individual has health insurance.
4. Select the insurance source by indicating 'yes' in the list provided. You must select 'no' for all insurance sources that the individual does not have. For a full list of response options, please reference the HMIS Data Manual.
5. Indicate if the individual has income from any source, this does not include non-cash benefits, which are collected separately.
6. Select the appropriate source of income (earned, retirement, disability benefits etc.). Once you select 'yes' for a source, an additional box will appear to record the amount of the income.

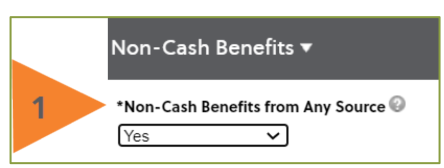




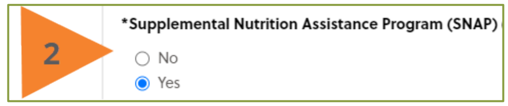


Adding Non-Cash Benefit Information

1. Indicate if the individual has non-cash benefits (i.e. SNAPS, TANF childcare, TANF transportation).
2. Indicate the specific benefit source (for full list see the Appendix A, data collection form).



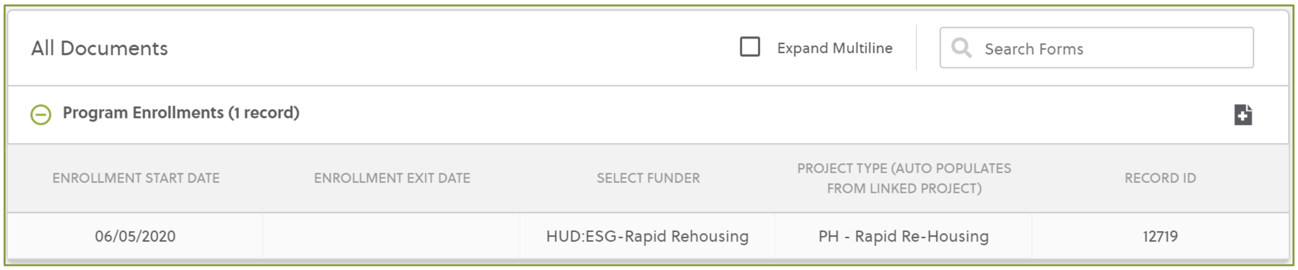
3. Click Save Linked Record.



The steps outlined above can be used for any assessment type including exit.

Viewing and Editing Records

To review a project record you have already created, repeat the steps outlined in Search Individuals. Select the individual you are looking for, click View Folder from the right-hand menu. From the documents folder, click ⊕ next Program Enrollments (or other document types of the client may have) to view project records already linked to this individual.



All Documents — Expand Multiline — Search Forms

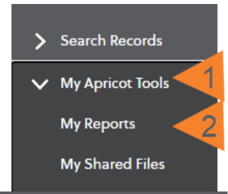
Program Enrollments (1 record)

ENROLLMENT START DATE	ENROLLMENT EXIT DATE	SELECT FUNDER	PROJECT TYPE (AUTO POPULATES FROM LINKED PROJECT)	RECORD ID
06/05/2020		HUD:ESG-Rapid Rehousing	PH - Rapid Re-Housing	12719

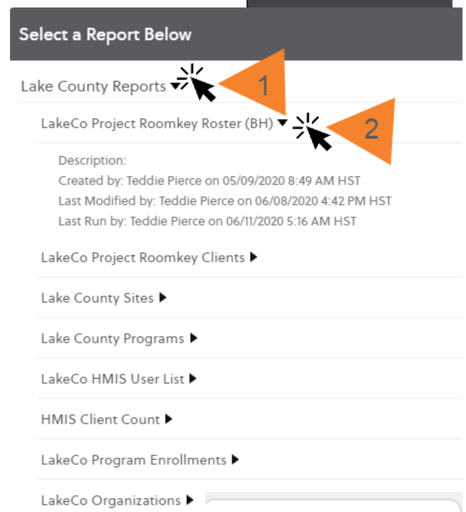
Tip: If, in parenthesis it says (0 records) then no records have been linked to this individual.

Generating a Report

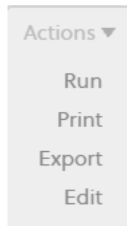
To generate needed reports, click 'My Apricot Tools' from the left-hand navigation menu.



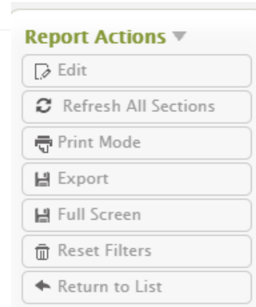
Click the caret icon (the small black triangle) next to the report list you are interested in to see all options. Click again next to the report you are interested in to see information such as who created the report and when it was last modified. To run the report, select Actions ▸ on the corresponding line, and then select 'run.' You can also use this menu to print, export or edit the report.



Once you have run the report you can choose different filters and rerun it. To explore and utilized these options, select on the right-hand side of the screen, across from Filters. This will result in a pop-up window that provides filter options via a dropdown menu.



After running the report, you can print, and adjusting filters (if needed), you can edit, refresh all sections, view the report in a printer friendly format or in full screen mode. You can also export the data or reset the filters.



Note: Options may vary based on your individual user settings and report customization. Also compliance reporting for grant purposes may only be generate by the HMIS Administrator.

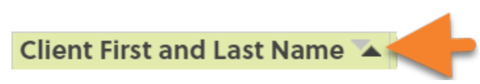
Search Individuals

Prior to creating a new individual record, search HMIS Client list to determine if they already have already been setup in the HMIS. Users should not create new 'duplicate' client records, they should use a client who has already been created.

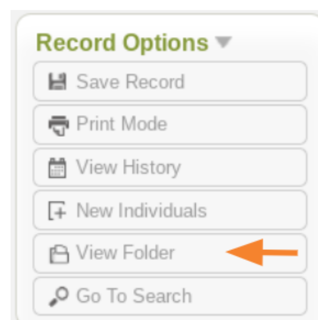
If you attempt to create a duplicated Client, you will see a duplicate message window. Return to the Client Search and attempt to relocate that client or contact the HMIS Administrator for assistance.

To locate an existing individual record, click 'Individuals' on the left navigation menu. The default search option that appears will allow you to search by First, Middle and Last Name. You can also choose to search by Record ID, date of birth, gender and several other project enrollment focused elements such as enrollment start date, or assessment data such as 'Select Active or Recently Exited.' The search engine begins to narrow search results as you type into the search box.

Tip: The search engine is looking only for an exact match. To avoid missing a valid result, enter in partial information, such as the first two to three letters of the first and last name. If you enter a full name, such as "Joseph Johnson" you will miss a result if this person was created as "Joe Johnson," or if there was a typo and they were created as "Joseph Johnsen." When searching for a match, ensure they are the person you are looking for by comparing the date of birth and social security number.



Once you locate the correct individual, you may either scroll down and click on the Name to proceed to their demographic information, or if you generate a list with multiple results, you can use the column headers to sort the data, as shown to the right.

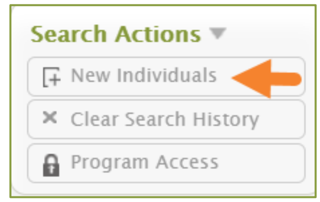


Clicking on the record will bring you to their demographics screen. To view the individual's other records, select 'view folder' from the right side of the screen.

Didn't find who you were looking for? Proceed to Create Individual.

Creating an Individual

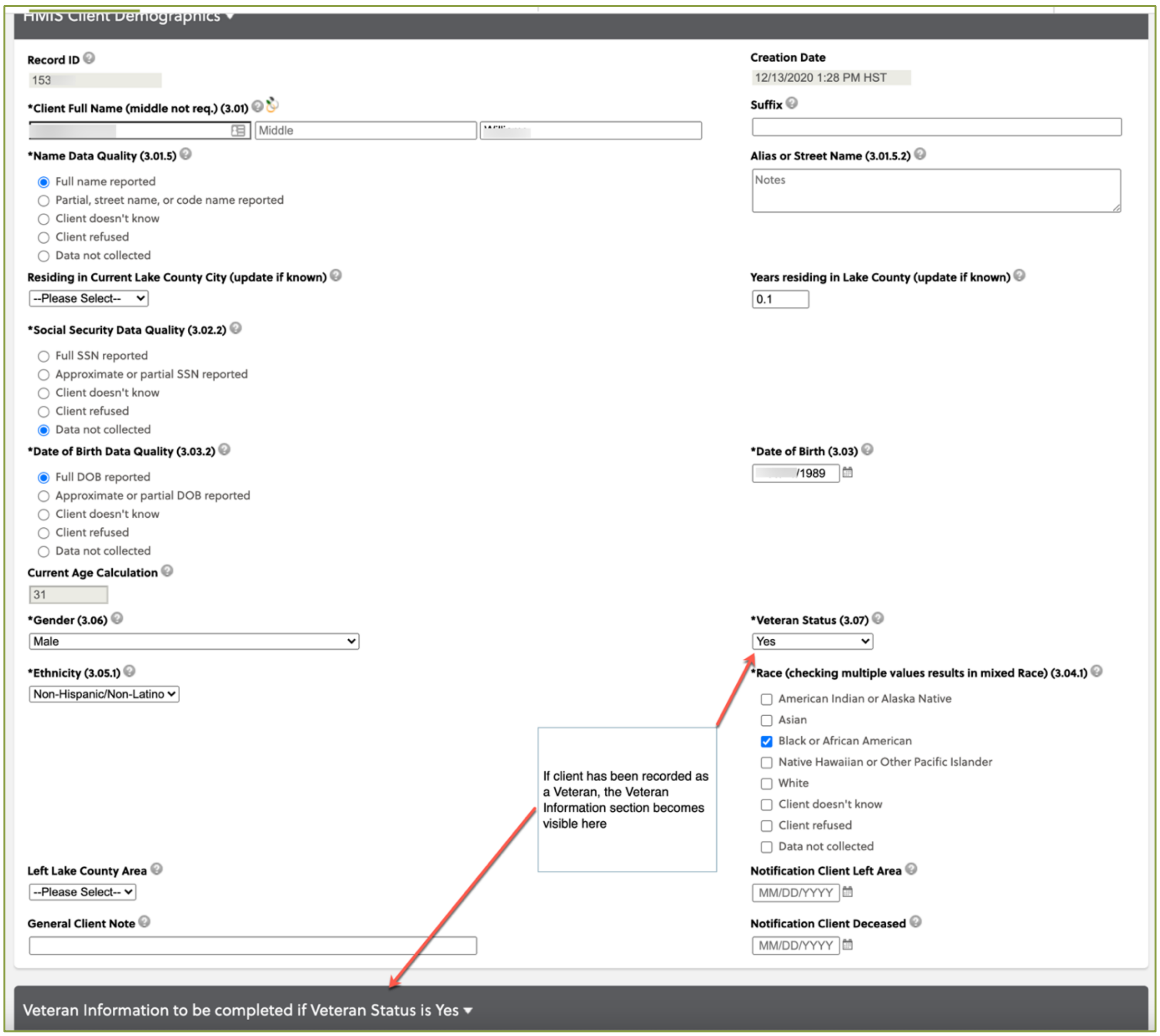
Creating a new individual record begins with completing their demographic form.



From the Search Screen, select 'New Individuals' from the right-hand menu

Complete the form shown in accordance with the [HMIS Data Standards] and locally required information.

Tips: Fields which are required in order to save this form are marked with an asterisk (*). Date fields must include separators, also known as a forward slash (/).



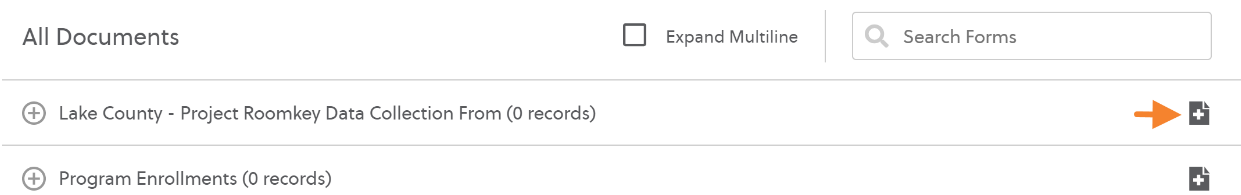
When the information has been entered, select Save Record from the right side of the screen. You will receive a confirmation that the record has been created, click 'Continue.' The system will generate a Record ID, a timestamp for the Created Date and show the link between this individual and their household.

Creating the Project Record

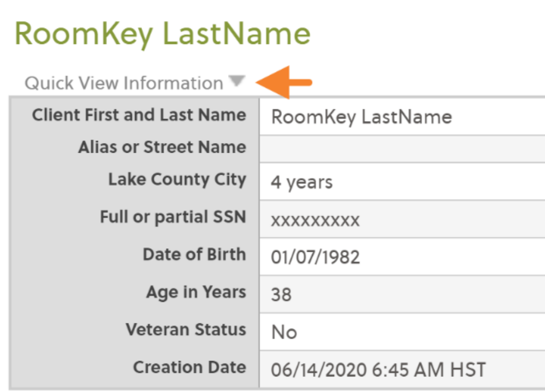
From the Individual Screen, select View Folder from the right-hand menu. You can view all data associated with this client from this screen. To view and link project records, select 'Links' from the top of the screen

From the upper right corner, select 'Create' to link a new enrollment.

Or click the 'create' icon to the right of the Project Roomkey Data Collection Form.



Tip: To view the individuals basic demographics from this form you can click Quick View Information located just below the header with the individual's name. This can be helpful to ensure you are working on the correct HMIS record and to confirm the basic information for this person.



Viewing and Editing a Record

To review a project record you have already created, repeat the steps outlined in Search Individuals. Select the individual you are looking for, click View Folder from the right-hand menu. From the View Documents folder, click next to Lake County – Project Roomkey Data Collection Form to view project records already linked to this individual.

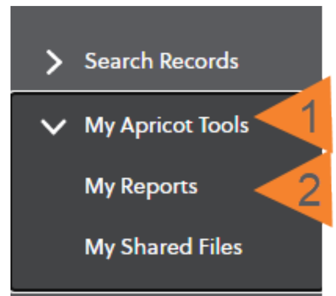
Lake County - Project Roomkey Data Collection From (1 record)

REFERRAL/INTAKE DATE	WAS CLIENT FURTHER ENROLLED INTO THE ROOMKEY PROJECT	HOTEL/MOTEL NAME	DATE OF PROJECT ROOMKEY ENTRY	DATE OF PROJECT ROOMKEY EXIT
06/12/2020	Yes	The Lamplighter Inn	06/12/2020	06/14/2020

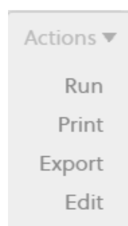
Tip: If, in parenthesis it says (0 records) then no records have been linked to this individual. Try searching for other households members if applicable, as the record may have been created under their name.

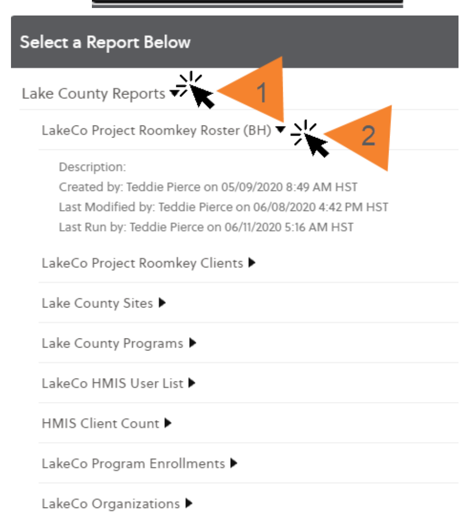
Generating a Report

To generate needed reports, click ‘My Apricot Tools’ from the left-hand navigation menu.



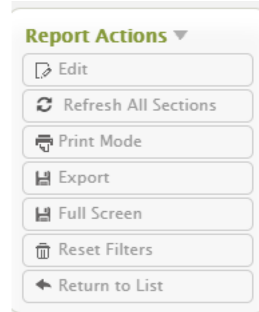
Click the ‘carot’ (the small black triangle) next to the report list you are interested in to see all options. Click again next to the report you are interested in to see information such as who created the report and when it was last modified. To run the report, select Actions on the corresponding line, and then select ‘run.’ You can also use this menu to print, export or edit the report. Once you have run the report you can choose different filters and rerun it. To explore and utilized these options, select on the right-hand side of the screen, across from Filters. This will result in a pop-up window that provides filter options via a dropdown menu.





APRICOT 360 Additional Information

After running the report you can print, and adjusting filters (if needed) you can edit, refresh all sections, view the report in a printer friendly format or full screen mode, export the data, or reset the filters. **Note:** Options may vary based on your individual user settings.



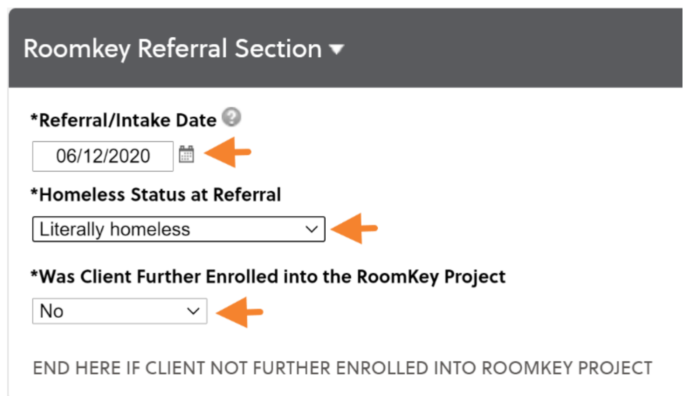
Supplemental Data Entry Guide - Project Roomkey

This section has been included in the manual to provide users an idea of how workflow and forms customization outside the full HUD workflow can be designed.

Navigate to project site Lake County Behavioral Health.' This can be viewed along the top of the screen and changed by clicking the and according to user permissions settings.

Roomkey Referral

Complete the Roomkey Referral Section with the referral/intake date (may differ from data entry date), Homeless Status at Referral and whether the client enrolled in the project. If the client did not enroll in the project, save the record by clicking Save Record on the right-hand side of the screen. The save will be confirmed, click Continue from the pop up window and end here.



If the client did enroll in the project, select 'yes' and continue.

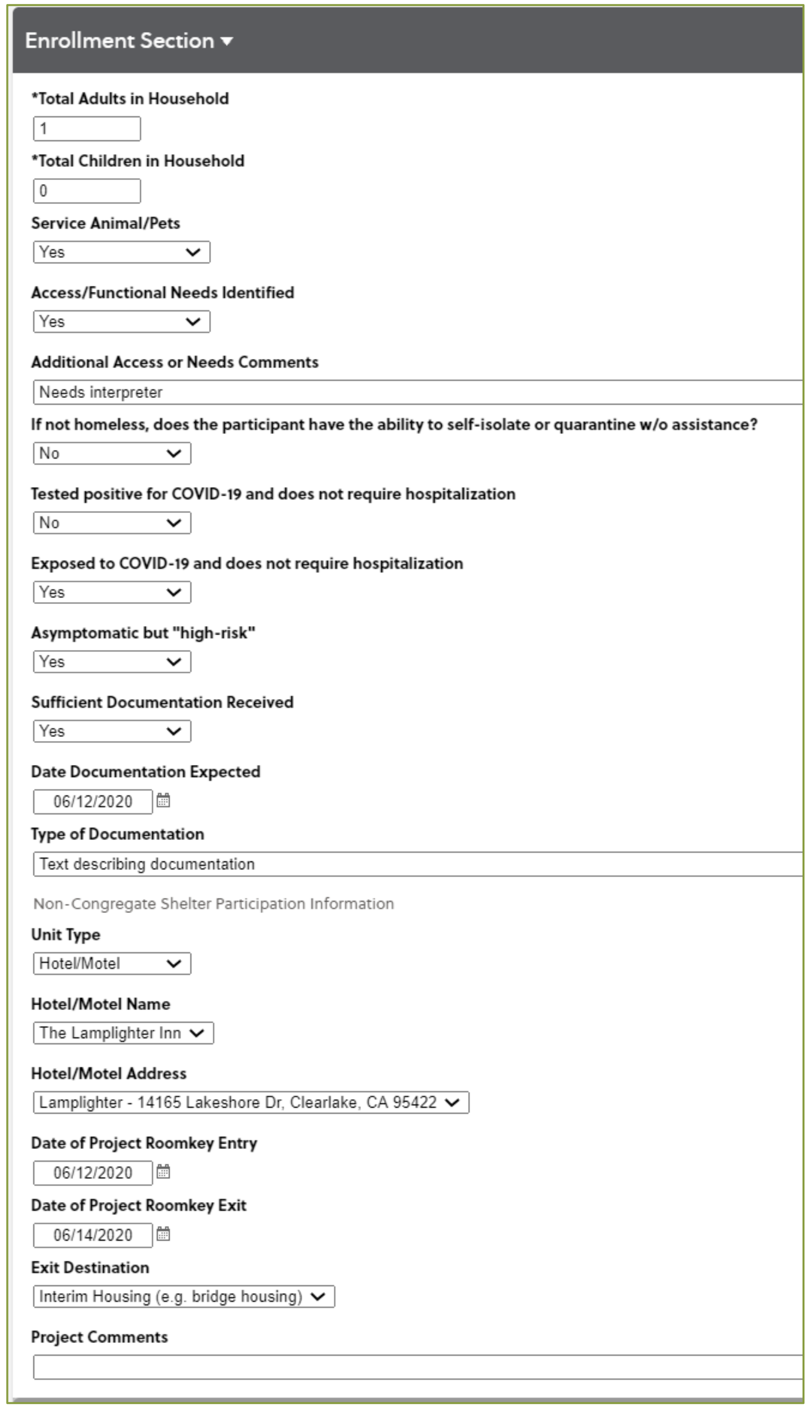
Custom Form (Roomkey)

This section of the manual has been left in place to demonstrate the use of a custom data entry process that differs from the [full HUD](#) workflow.

Complete the data entry fields as they pertain to the household.
For additional information about how to answer these questions please see
_________________.

Once you have completed these questions, click Save Record on the right-hand side of the screen.

The Save will be confirmed, click Continue from the pop-up window and end the data entry.


Enrollment Section

*Total Adults in Household
1
*Total Children in Household
0
Service Animal/Pets
Yes
Access/Functional Needs Identified
Yes
Additional Access or Needs Comments
Needs interpreter
If not homeless, does the participant have the ability to self-isolate or quarantine w/o assistance?
No
Tested positive for COVID-19 and does not require hospitalization
No
Exposed to COVID-19 and does not require hospitalization
Yes
Asymptomatic but "high-risk"
Yes
Sufficient Documentation Received
Yes
Date Documentation Expected
06/12/2020
Type of Documentation
Text describing documentation
Non-Congregate Shelter Participation Information
Unit Type
Hotel/Motel
Hotel/Motel Name
The Lamplighter Inn
Hotel/Motel Address
Lamplighter - 14165 Lakeshore Dr, Clearlake, CA 95422
Date of Project Roomkey Entry
06/12/2020
Date of Project Roomkey Exit
06/14/2020
Exit Destination
Interim Housing (e.g. bridge housing)
Project Comments

Data Collection Forms March 31, 2021

All Projects (contact the HMIS Administrator or access this Google Sites link for the most current data collection forms)

Client Data Collection and Entry Forms
Client Record (all projects)
Client Record Veteran Supplemental (All Projects)
Project Enrollment (includes HMIS Assessments for Data Collection Stage = Entry)
Project Exit (includes HMIS Assessments for Data Collection Stage = Exit)

Administrative Forms for additions to the HMIS
Agency Information
Project Information
User Setup and Permissions

Note about forms: HUD has typically been on a two-year cycle to update the HMIS data elements so when that happens the forms will be updated and published by the HMIS Administrator.

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