

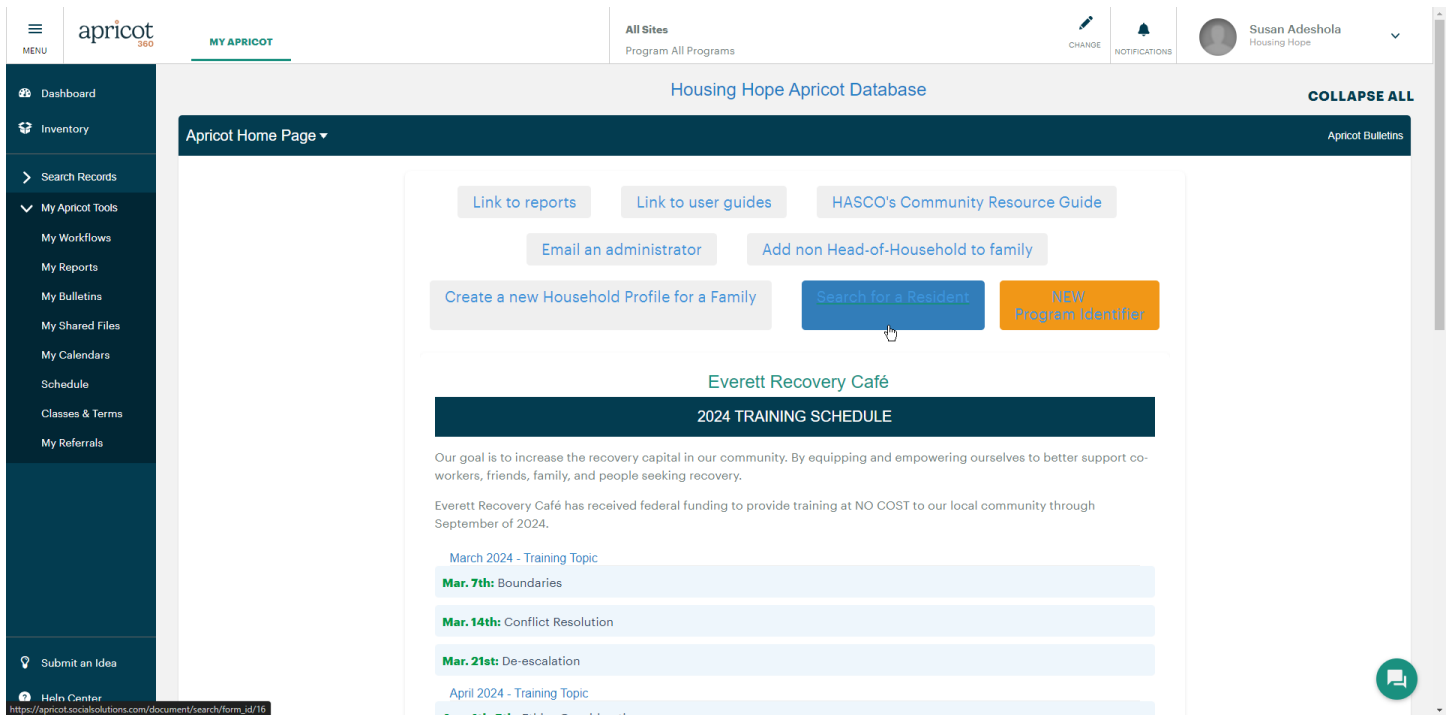
# Occupancy Departure Guide



**HOUSING  
HOPE**  
we keep hope alive

apricot

Date Updated: 06/13/2024



## Step 1: Accessing the Resident Search Function

- 1.) Log in to the Housing Hope Apricot Database.
- 2.) From the home page, locate the 'Search for a Resident' button in the center-right of the screen, indicated by a blue background when hovered over. Click on this button to begin the search process.

The screenshot displays the 'Participant Profile' search interface in the Apricot 360 system. The top navigation bar includes the Apricot 360 logo, the user's name 'Dane Wagenhoffer', and site information 'All Sites Program All Programs'. The left sidebar contains navigation links such as 'Dashboard', 'Inventory', 'Search Records', 'Household Profile', 'Participant Profile', 'College of Hope Sign-In', 'College of Hope Class Review Form', 'Incidents of Abuse and Neglect', 'College of Hope Demographic Form', 'College of Hope - Classes', 'College of Hope - Class Dates', 'Unit Tracker', 'My Apricot Tools', 'Submit an Idea', and 'Customer Care'. The main content area is titled 'Participant Profile' and features a 'Participant Profile Search' section. This section includes a search bar with the text 'test' and a 'Search Results' button. Below the search bar, a table displays the search results. The table has columns for 'Name', 'Date', 'Date Of Birth', 'HMIS Client Number', 'HMIS Head Of Household Cite...', and 'Cell Phone'. A single record is shown with the name 'test fsd', date '11/08/2023', and date of birth '11/01/2023'. The right sidebar contains 'EXPAND ALL' and 'Search Actions' buttons, along with a 'Create Batch Records' section and a 'Favorite Lists' section. The bottom of the page shows a URL: 'https://apricot.socialsolutions.com/document/cdd61d/24476'.

## Step 2: Searching for a Resident

### 1.) Enter the Resident's Information:

- In the 'Participant Profile Search' section, add search fields as needed.
- Enter the resident's name or other identifying information in the appropriate fields (e.g., Name, Date of Birth).

### 2.) View Search Results:

- Once the information is entered, a list of matching participant profile records will be displayed.
- Locate the desired resident from the list. In this example, the resident named 'test fsd' is found.

### 3.) Select the Resident Profile:

- Click on the resident's name in the search results to access their profile. Clicking on the mint text will direct you to the record, while clicking on the gray text will take you to the Tier 1 document folder.

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MY APRICOT ADMINISTRATOR

All Sites  
Program All Programs

CHANGE NOTIFICATIONS

Dane Wagenhoffer  
Housing Hope

Dashboard

Inventory

Search Records

My Apricot Tools

Submit an Idea

Customer Care

Help Center

Emergency/Alternate Contact Information

Emergency/Alternate Contact Name

Emergency/Alternate Contact Phone Number

Relationship

System Fields

Linked 'Household Profile' Records

Link Instructions

Household Profile	Start Date	End Date	Name of Head of Household	HHS client ID for HHS	Household Address	Link Info	Active	Delete	Date
	01/01/2020	01/15/2020	Test Test	0					Added on 08/18/2024

Total Active Links:0, Total Deactivated Links:0, Current Active Links:1, Current Deactivated Links:0

Linked 'Exit from Homeless Housing Data Sheet' Records

Link Instructions

Total Active Links:0, Total Deactivated Links:0, Current Active Links:1, Current Deactivated Links:0

Linked 'Occupancy/Departure' Records

Link Instructions

Total Active Links:0, Total Deactivated Links:0, Current Active Links:1, Current Deactivated Links:0

Linked 'Occupancy/Departure' Records (1)

Link Instructions

Total Active Links:0, Total Deactivated Links:0, Current Active Links:1, Current Deactivated Links:0

Record Options

Assigned Programs

Record Save Checklist

Form Logic Rules

Last Saved

Favorites

## Step 3: Accessing Household Profile Records

### 1.) Locate Emergency/Alternate Contact Information:

- Scroll down the resident profile page until you reach the 'Emergency/Alternate Contact Information' section. Review and update any contact details if necessary.

### 2.) Find Linked Household Profile Records:

- Continue scrolling to the 'Linked Household Profile Records' section. This section lists all household profiles linked to the resident.

### 3.) Proceed to Household Profile:

- Click on the household profile name to view more details or to update the occupancy departure information.

The screenshot displays the 'Household Profile' page in the Apricot 360 system. The page is divided into a main content area and a right-hand sidebar. The main content area is titled 'Identifying Information for Household' and contains various input fields for household details. The sidebar on the right, under the heading 'COLLAPSE ALL', includes sections for 'Record Options' (with buttons for Save Record, Print Mode, Archive Record, View History, New Household Profile, and View Folder), 'Assigned Programs' (listing Housing - Avondale and Housing - Commerce Bldg), 'Record Save Checklist' (showing Required Field Checks and Field Validation Checks as complete), 'Last Saved' (timestamped 04/08/2024 10:28 AM PDT by Dane Wagenhoffer), and 'Favorites' (with options for My Household Profile and Set Favorites). The user's name, Dane Wagenhoffer, and role, Housing Hope, are visible in the top right corner. The bottom of the page shows a URL: https://apricot.socalsolutions.com/profile/index/id/1543.

apricot 360

MY APRICOT ADMINISTRATOR

All Sites  
Program All Programs

CHANGE NOTIFICATIONS

Dane Wagenhoffer  
Housing Hope

Dashboard  
Inventory  
Search Records  
My Apricot Tools  
Submit an Idea  
Customer Care  
Help Center

Household Profile

Identifying Information for Household

\*Start Date  
01/16/2020

End Date  
MM/DD/YYYY

\*Name of Head of Household  
test Middle test2

HMIS client ID for HoH  
0

Household Type  
--Please Select--

Household Address  
Address  
Line 1  
Line 2  
City  
State  
--Please Select--  
County  
County  
Zip

Clear Select to map No results found

COLLAPSE ALL

Record Options

Save Record  
Print Mode  
Archive Record  
View History  
New Household Profile  
View Folder  
Go To Search

Assigned Programs

Housing - Avondale  
Housing - Commerce Bldg ...  
Program Access

Record Save Checklist

Required Field Checks  
Field Validation Checks

Last Saved

04/08/2024 10:28 AM PDT  
Dane Wagenhoffer

Favorites

My Household Profile  
Records  
Set Favorites

https://apricot.socalsolutions.com/profile/index/id/1543

## Step 4: Viewing the Household Folder

### 1.) Review Household Profile Details:

- After selecting the household profile, you will be taken to the 'Household Profile' page.
- Review the identifying information for the household, including the start date, name of the head of household, and household address.

### 2.) Access the Household Folder:

- On the right-hand side, under 'Record Options,' locate and click the 'View Folder' button. This will open the folder containing all related documents and forms for the household.

The screenshot shows the Apricot 360 Administrator interface. The top header includes the Apricot 360 logo, the user name 'Dane Wagenhoffer', and navigation links for 'CHANGE' and 'NOTIFICATIONS'. The left sidebar contains a 'MENU' button and several navigation options: 'Dashboard', 'Inventory', 'Search Records', 'My Apricot Tools', 'Submit an Idea', 'Customer Care', and 'Help Center'. The main content area is titled 'test test2' and features a 'Quick View Information' section. Below this, there are tabs for 'DOCUMENT FOLDER', 'CENSUS', 'LINKS', 'ENROLLMENTS', and 'APPOINTMENTS'. The 'DOCUMENT FOLDER' tab is active, showing a list of documents. The list includes 'All Documents', 'Number in Household (0 records)', 'Initial Family Assessment (0 records)', 'Exit from Homeless Housing Data Sheet (0 records)', 'New Form (5) (0 records)', and 'Occupancy/Departure (2 records)'. A 'Create new record' button is located at the bottom right of the 'Occupancy/Departure' section. The URL at the bottom of the page is [https://apricot.socalsolutions.com/document/edit/form\\_id/158/parent\\_id/1542/id/new](https://apricot.socalsolutions.com/document/edit/form_id/158/parent_id/1542/id/new).

## Step 5: Creating an Occupancy/Departure Record

### 1.) Open the Household Folder:

- After clicking 'View Folder' in the previous step, you will be taken to the household's document folder.

### 2.) Locate the Occupancy/Departure Section:

- In the document folder, find the 'Occupancy/Departure' section. This section lists all existing occupancy and departure records for the household.

### 3.) Create a New Record:

- Click the icon on the right-hand side of the 'Occupancy/Departure' section labeled 'Create new record' to initiate the process of creating a new occupancy or departure record.

The screenshot shows the 'My Apricot' Administrator interface. The top navigation bar includes the 'apricot 360' logo, 'MY APRICOT ADMINISTRATOR', and user information for 'Dane Wagenhoffer, Housing Hope'. The left sidebar contains links to Dashboard, Inventory, Search Records, and My Apricot Tools. The main content area features an orange informational box at the top, followed by a 'New Section' form. The form has three radio button options: 'Entered Housing Hope', 'Exited Housing Hope' (which is selected), and 'Transfer Within HH Programs/Other'. The 'Exited Housing Hope' section includes a required '\*Exit Type:' dropdown menu (currently showing '--Please Select--'), a required '\*Exited Unit' field with a 'Hide Deactivated Links' checkbox and an 'Add' button, and a required '\*Family Member(s) Exiting' field with a 'Hide Deactivated Links' checkbox and an 'Add' button. The right sidebar contains 'Record Options' (Save Record, New, View Folder, Go To Search), 'Assigned Programs' (Program Access), 'Record Save Checklist' (Required Field Checks, Exited Unit, Family Member(s) Exiting, Exit Type, Field Validation Checks), and 'Form Logic Rules' (Entered HH, Exited HH, Transfer/Other, Other, Unit Transfer Only, Name Change, entry type ind, Entry type family, Exit type ind, Exit type family).

## Step 6: Completing the Occupancy/Departure Form

### 1.) Indicate Entry/Exit/Transfer Details:

- On the 'Occupancy/Departure' form, select 'Entered Housing Hope,' 'Exited Housing Hope,' or 'Transfer Within HH Programs/Other' as appropriate.
- Choose the appropriate type from the 'Type' dropdown menu (e.g., 'Exit Type' for exits).
- Enter the relevant date in the 'Date' field.

The screenshot displays the 'apricot 360' ADMINISTRATOR interface. The main content area is titled 'New Section' and contains a form for adding an 'Exited Unit'. The form includes the following elements:

- Exit Type:** A dropdown menu set to 'Family'.
- Family Exit Summary:** A box indicating 'Family leaves Housing Hope Housing' and 'This DOES include Single person Households exiting Units'.
- Exited Housing Hope: Household(s) Date:** A date field set to '06/11/2024'.
- Exited Unit:** A field with a green 'Add' button and a checked 'Hide Deactivated Links' option.
- Family Member(s) Exiting:** A field with a green 'Add' button and a checked 'Hide Deactivated Links' option.

Red text indicates required fields: 'This field is required.' for both the 'Exited Unit' and 'Family Member(s) Exiting' fields.

The right sidebar contains several utility sections:

- Record Options:** Save Record, New, View Folder, Go To Search.
- Assigned Programs:** Program Access.
- Record Save Checklist:** Required Field Checks (marked with a red X), Exited Unit, Family Member(s) Exiting (marked with a green checkmark), Field Validation Checks (marked with a green checkmark).
- Form Logic Rules:** Entered HH, Exited HH, Transfer/Other, Other, Unit Transfer Only, Name Change, entry type ind, Entry type family, Exit type ind, Exit type family.

## Step 7: Adding the Exited Unit

### 1.) Add the Unit:

- Click the 'Add' button next to 'Unit' to search for and select the unit involved in the entry, exit, or transfer.

### 2.) Linking Fields:

- In the next steps, we will walk through the process of linking the fields for unit and family members in detail.



Unit Tracker Search

Create New
Link All
Clear History

-- Add Search Field --
Browse All

Unit Tracker
Site
Building Number
Unit Number
Status
Pod
Address
Services Staff Assigned to Unit
Unit Type
Unit Notes
Household Profile (via Current Resident Family)
Start Date
End Date
Name of Head of Household
HMIS client ID for HoH
Household Address
Total Number of Household Members

Records
More Columns...

Unit Number	Building Number	Status
	C	Occupied
New Century Village Teen and Young Family	202	C
	C	Occupied
Twin Lakes Landing (Affordable)	103	C
		Unoccupied, Unknown

## Step 8: Adding the Exited Unit

### 1.) Add the Unit:

- Click the 'Add' button next to 'Unit' to search for and select the unit involved in the entry, exit, or transfer.

### 2.) Search for the Unit: - A 'Unit Tracker Search' window will appear.

- Click the 'Add Search Field' dropdown at the top of the pop-up window.
- Use 'Site,' 'Building Number,' and 'Unit Number' to narrow down the results to your intended unit.
- Complete these fields, then select your unit from the search results.
- Click out of the box to confirm your selection.



The screenshot displays the 'New Section' form in the apricot 360 ADMINISTRATOR. The form is titled 'New Section' and includes several sections:

- Exit Type:** A dropdown menu set to 'Family'.
- Family Exit:** A list of items: 'Family leaves Housing Hope Housing' and 'This DOES include Single person Households exiting Units'.
- \*Exited Housing Hope: Household(s) Date:** A date field set to '06/11/2024'.
- \*Exited Unit:** A field set to '29067'.
- \*Family Member(s) Exiting:** A field set to 'test fsd'.

The right sidebar contains several utility sections:

- Record Options:** Includes buttons for 'Save Record', 'New', 'View Folder', and 'Go To Search'.
- Assigned Programs:** Includes a button for 'Program Access'.
- Record Save Checklist:** Includes 'Required Field Checks' and 'Field Validation Checks'.
- Form Logic Rules:** Includes a list of rules: 'Entered HH', 'Exited HH', 'Transfer/Other', 'Other', 'Unit Transfer Only', 'Name Change', 'entry type ind', 'Entry type family', 'Exit type ind', and 'Exit type family'.

## Step 10: Reviewing Linked Fields

### 1.) Review Linked Fields:

- Ensure that the 'Exited Unit' and 'Family Member(s) Exiting' fields are filled with the correct information.

### 2.) Confirm Details:

- Check that the date and type fields are completed accurately.
- Verify that all linked units and family members are listed correctly.

### 3.) Click the Assigned Programs button on the side of your screen

Assign Programs

Available Programs

Add All >>

Housing - New Century Village MH PSH  
Housing - New Century Village Other  
Housing - New Century Village Other PSH  
Housing - Pending Move-In

Add >

< Remove

Assigned Programs

<< Remove All

Housing - New Century Village Teen and Young Family

Use the Add and Remove buttons above to update program assignment

You must save the record for the access changes to be applied

Apply

Cancel

## Step 11: Assigning the Correct Program

### 1.) Navigate to Program Access:

- On the 'Occupancy/Departure' form, after adding the exited unit and family members exiting, locate the 'Program Access' button under 'Assigned Programs' on the right-hand side.

### 2.) Open Assign Programs Window:

- Click on the 'Program Access' button to open the 'Assign Programs' window.

### 3.) Select the Appropriate Program:

- In the 'Assign Programs' window, you will see a list of available programs on the left and assigned programs on the right.
- Find the correct program for the household by scrolling through the list of 'Available Programs' on the left.

### 4.) Add the Program:

- Click on the desired program to highlight it, then click the 'Add' button to move it to the 'Assigned Programs' list on the right.

### 5.) Apply Changes:

- Once the correct program is in the 'Assigned Programs' list, click 'Apply' to save the changes.

## Record Options ▼



Save Record



New



View Folder



Go To Search

### Step 11: Saving the Record

#### 1.) Save the Record:

- On the right-hand side under 'Record Options,' locate the 'Save Record' button.
- Click on 'Save Record' to finalize and save all the information entered.

#### 2.) Confirmation:

- After clicking 'Save Record,' verify that the changes have been saved correctly. You should see a confirmation message or an update indicating that the record has been saved successfully with the message "Record Saved" at the top of the screen.