



# **User Manual**



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# Introduction

Apricot for Victims' Support (AVS) is an efficient and highly secure software solution for victims' support service providers, such as **domestic violence**, **sexual assault**, **crime victims**, and more. Apricot provides the tools and functionality needed to track what matters, collaborate with ease and easily produce government and private grant reports that help you prove impact.

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## AVS Overview

AVS allows organizations to track what matters, providing one system to manage whatever information you and your staff, clients, and shelters need, capture.

- Capture information from initial applications and initiatives to progress reporting and outcomes, so nothing falls through the cracks
- Eliminate duplication of effort and deliver reports with push-button efficiency
- Better manage virtually anything – individual household profiles, cases, programs, services volunteers and more.

AVS allows collaboration with ease, creating a single environment to record records, assessments, updates, reports and actions, accessible to all users.

- Securely access and use information anywhere via multiple browsers, in multiple languages, and with a tablet or smart phone
- Automate and streamline the way teams share information, serve clients and determine outcomes
- Enable clients, victims, volunteers and shelters to securely access and submit information via the web.

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## Using AVS

This user manual is intended to be an overview of the forms included in the AVS system. With instructions on navigating the product, creating records, and making changes to options within the system, this guide serves as both an introduction to the product and a step-by-step walk-through for new users.

# Intake

When entering a client into your AVS system, the first thing you must do is create an Intake form for the person or person(s) who are enrolling with your organization. This form tracks or links the clients who came in together at a particular time.

The screenshot displays the 'my apricot administrator' interface. At the top, there are navigation links for 'administrator', 'customer care', and 'help center'. The user is identified as 'Jonathan Damrich, Administrators'. The main content area is titled 'Intake' and features a form with the following sections:

- Client(s)**: A dropdown menu.
- Record ID**: A text field containing '...'.
- \*Enrollment Date**: A date field set to '08/15/2014' with a calendar icon.
- Enroll Client(s)**: A section with instructions: 'Create Client(s) for this Enrollment.' followed by three numbered steps: 1) Save this Record, 2) Link Clients to Enrollment, and 3) Search for Existing/Create New Clients. Below the instructions is a 'Link to Client Profile' section with a 'Hide Deactivated Links' checkbox and an 'Add' button.
- Record Options**: A menu with buttons for 'Save Record', 'Adjust Access', 'New Intake', and 'Go To Search'.
- Record Save Checklist**: A menu showing 'Required Field Checks' and 'Field Validation Checks', both with green checkmarks.
- System Fields**: A section with a right-pointing arrow.

At the bottom of the page, the 'apricot by ctk | for Victims' Support' logo is displayed, along with the text 'Load Time: 0.18 | Total Queries: 49'.

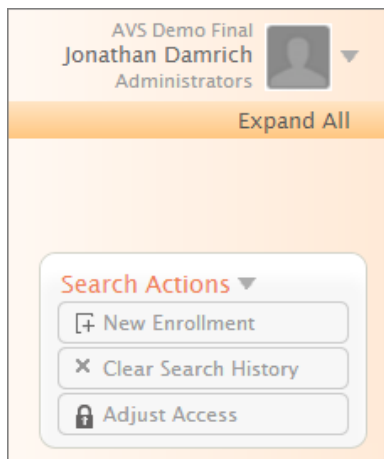
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# Creating an Intake record

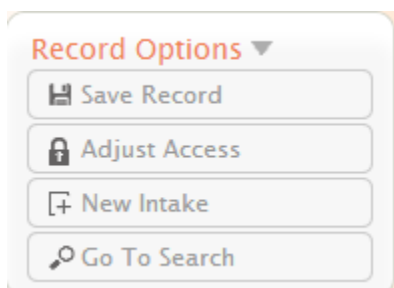
A new Intake should be created in the following two situations:

- If a client, or group of clients, has not received services from your organization previously
- If a client has completed all previous services and is beginning services with your organization again.
  - If a client is beginning a new program but is already receiving a service from your organization, please create a Program Enrollment. More information on that can be found in the [Program Enrollment](#) section.

1. From the My Apricot tab, click “New Intake.” You can also open the My Apricot Navigation Menu on the left by clicking “Open/Close,” then click on Intake under Search Records.



2. Click “New Intake” under the Search Actions menu on the right side of the screen.
3. Save the record. This can be done by clicking “Save Record” on the Record Options palette on the right side of the screen.



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# Creating/Selecting Records for an Intake

1. Click the “Add” button.

The screenshot shows the 'Intake' form. At the top, there is a 'Client(s)' dropdown menu. Below it, there are fields for 'Record ID' (containing '-') and '\*Enrollment Date' (containing '08/15/2014'). Underneath is the 'Enroll Client(s)' section, which includes instructions on how to create and link clients. At the bottom right of this section, there is a checkbox for 'Hide Deactivated Links' and an 'Add' button.

## Existing Profile Record

If the client has previously visited your organization, they should already have a client profile you can select from within the Client Profile Search

1. Click the dropdown box labeled Add Search Field.
2. Select a field to search by.

The screenshot shows the 'Client Profile Search' window. It has a search dropdown menu with 'Add Search Field' selected. Below the search area is a table with columns for 'Record ID' and 'Alert List?'. The table contains several rows of data, including 'Cook' and 'Natalie Test Davis'. There are also buttons for 'Create New', 'Link All', and 'Clear History' at the top right.

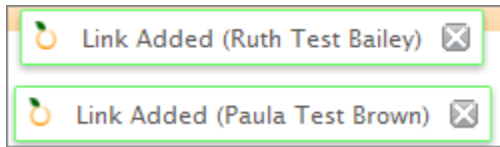
Record ID	Alert List?
32	
13	
34	
23	Yes
133	Yes
128	

3. Search for the client by the field you’ve selected

The screenshot shows the 'Name (Client Profile)' search form. It has three input fields for 'First Name', 'Middle', and 'Last Name'. The 'First Name' field contains 'Paula', the 'Middle' field is empty, and the 'Last Name' field contains 'Brown'.



4. Click the line the Client's name is on to add them to the Intake record. This will bring up a box above the search that says "Link Added" with the client's name.



## **New Client (No Profile Record)**

If the client has not previously visited:

1. Click "Create New" at the top of the Client Profile Search.
  - a. For more information on creating Client Profile records, go to

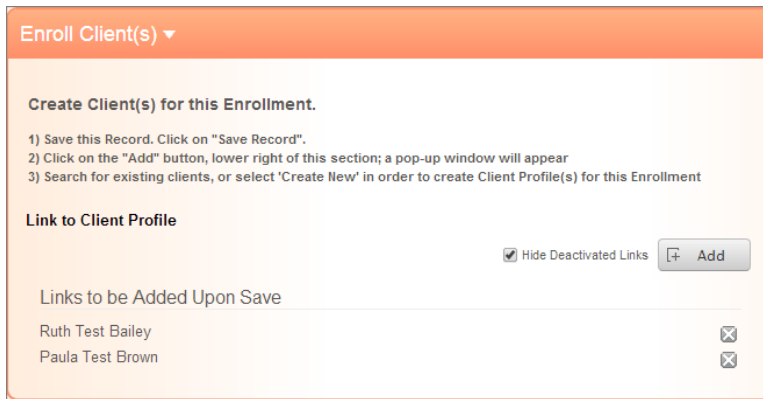
Creating a Client Profile.



Client Profile Search

## Completing the Intake

Once you have created and selected the necessary Client Profiles, you'll see your selections underneath "Links to be Added" in the Enroll Client(s) section.



Enroll Client(s) ▾

Create Client(s) for this Enrollment.

1) Save this Record. Click on "Save Record".  
2) Click on the "Add" button, lower right of this section; a pop-up window will appear  
3) Search for existing clients, or select 'Create New' in order to create Client Profile(s) for this Enrollment

Link to Client Profile  Hide Deactivated Links

Links to be Added Upon Save

Ruth Test Bailey	<input type="checkbox"/>
Paula Test Brown	<input type="checkbox"/>

1. Verify the names under Links to be Added Upon Save are correct, then save the record.
2. Fill out the information in the remaining sections.
  - a. Current Situation
  - b. Contact Information
  - c. Emergency Contact Information
3. Save the record.

# Client Profile

The Client Profile is where you will capture the most basic identifying information for a client. If any information on this form does change or is discovered to be incorrect, it is extremely important it is updated immediately.

**Note:** Please be sure that you have completed an associated Intake before creating a Client Profile, unless the person you are completing a profile for is not present at the time of intake or if the type of Program Intake you are creating is a Hotline Call.

my apricot administrator customer care help center AVS Demo Final (1425) Jonathan Damrich Administrators Collapse All

Client Profile

Main

**\* Name** First Middle Last

**Aliases** Notes

**\* Date of Birth** MM/DD/YYYY

**Social Security Number** [ ] [ ] [ ]

**Record ID**

**Alert List?**  Yes

**\* Race (Up to 5 can be selected)**

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White
- Client doesn't know
- Client refused

**Primary Language**

- English
- Spanish
- French
- Other

**Disability**

- Physical
- Mental
- Developmental

**\* Ethnicity** --Please Select--

**\* Gender** --Please Select--

**Sexual Orientation** --Please Select--

**\* Veteran Status** Data not collected

**Record Options**

- Save Record
- Adjust Access
- New Client Profile
- Go To Search

**Record Save Checklist**

Required Field Checks

- Name
- Date of Birth
- Race (Up to 5 can be select...)
- Ethnicity
- Gender
- Field Validation Checks

**Associated Records**

**Associated Enrollment Records**  Hide Deactivated Links Add

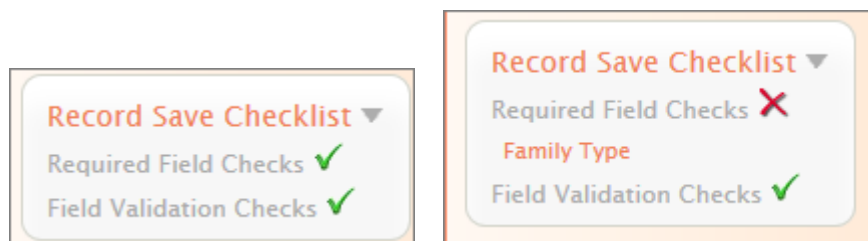
**Associated Household Record**  Hide Deactivated Links Add

apricot

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# Creating a Client Profile Record

1. Fill in all relevant fields.
  - a. Ensure accuracy of required fields.
    - i. Name
    - ii. Date of Birth
    - iii. Race
    - iv. Ethnicity
    - v. Gender
    - vi. Veteran Status
2. Ensure the Record Save Checklist shows that all required fields have been filled in.
  - a. Required fields are marked with an asterisk.
  - b. Click field name in checklist to be directed to that field on form



Underneath Associated Records, there are linking fields for Associated Intake Records and Associated Household Records. Here, you can ensure that an Intake has been created for this client or add this client to a Household. For more information on Intake records, go to the **Error! Reference source not found.** section. For more information on Household Records, go to the [Household](#) section.



# Household

The Household form is meant to link members of a particular household, regardless of whether those members were part of the group that came in at a specific time.

The screenshot displays the 'Household' form in the Apricot software. At the top, there is a navigation bar with 'my apricot administrator customer care help center' and a user profile for 'Jonathan Damrich, Administrators'. The main content area is titled 'Household' and contains a 'Main' tab. Below the tab, there is a section for '\* Clients Who Belong to this Family/Household' with a 'Hide Deactivated Links' checkbox and an 'Add' button. A 'Links to be Added Upon Save' section contains a text input field with 'Rebecca Test Cook' and a dropdown menu with '-Select One-'. A 'Record ID' field is also present. On the right side, there are two panels: 'Record Options' with buttons for 'Save Record', 'Adjust Access', 'New Household', and 'Go To Search'; and 'Record Save Checklist' with items 'Required Field Checks' (marked with a red X), 'Clients Who Belong to this ...', and 'Field Validation Checks' (marked with a green checkmark). The Apricot logo and 'by ctk | for Victims' Support' are at the bottom.

## Creating a Household Record

1. Click "Add" under "Associated Records" on the Client Profile of the person you're trying to link to a Household. If the Household already exists in your Apricot, click the line it's located on to link the client to that record.

**Note:** If you wish to track household members who may not be included in the Intake, please create a Client Profile for them just as you would for someone who is included.

# Program Enrollment

A Program Enrollment should be created whenever a client is being enrolled in a program provided by your organization. This allows you to capture all relevant information to the client's enrollment for that particular program, ensuring accurate reporting. The Program Enrollment is a versatile form that is used to track many types of programs, with fields that appear dependent on the choices you make.

### Program Enrollment

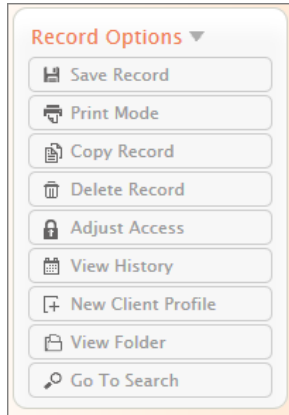
**Paula Test Brown**  
QuickView Information ▶

#### Enrollment Details ▼

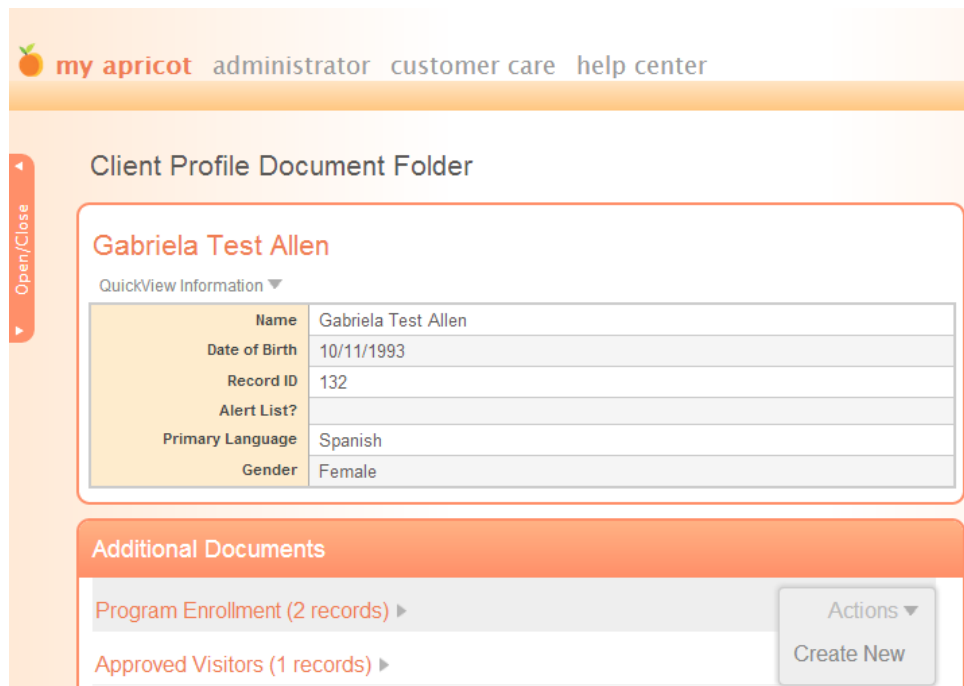
<b>Associated Intake</b> -- Please Select -- ▼	<b>*Program Type</b> <input type="radio"/> Non-Residential <input type="radio"/> Residential <input type="radio"/> Hotline	
<b>*Client Type</b> <input type="radio"/> Adult <input type="radio"/> Child	<b>Service Site</b> -- Please Select -- ▼	
<b>*Enrollment Status</b> --Please Select-- ▼	<b>Reason Turned Away</b> --Please Select-- ▼	<b>*Eligible for HUD Funding?</b> <input type="radio"/> Yes <input type="radio"/> No
<b>*Service Start Date</b> 08/18/2014 📅	<b>Closure Type</b> <input type="radio"/> Exit <input type="radio"/> Re-Enrollment	
<b>Abuse Status</b> <input type="radio"/> Primary Victim <input type="radio"/> Secondary Victim	<b>Victim Type</b> <input type="checkbox"/> Domestic Violence <input type="checkbox"/> Sexual Assault	<b>Staff</b> -- Please Select -- ▼

# Creating a Program Enrollment Record

1. View the folder of the client you wish to create the enrollment for.
  - a. After creating the Client Profile, click “View Folder” under the Record Options palette on the right side of the screen.



- b. If you're creating an enrollment for an existing client, click Client Profile Search on the screen under “My Apricot,” find the client you're looking for, then click any field that is not orange on the row of their record in order to open their Document Folder.
      - i. Hover over “Actions” on the Program Enrollment line.
      - ii. Select “Create New”.



## Enrollment Details

**Enrollment Details** ▾

<b>Associated Intake</b> <input type="text" value="-- Please Select --"/>	<b>*Program Type</b> <input type="radio"/> Non-Residential <input type="radio"/> Residential <input checked="" type="radio"/> Hotline	
<b>*Client Type</b> <input type="radio"/> Adult <input type="radio"/> Child	<b>Service Site</b> <input type="text" value="-- Please Select --"/>	
<b>*Enrollment Status</b> <input type="text" value="--Please Select--"/>	<b>Reason Turned Away</b> <input type="text" value="--Please Select--"/>	<b>*Eligible for HUD Funding?</b> <input type="radio"/> Yes <input type="radio"/> No
<b>*Service Start Date</b> <input type="text" value="08/18/2014"/> <input type="button" value="📅"/>	<b>Closure Type</b> <input type="radio"/> Exit <input type="radio"/> Re-Enrollment	
<b>Abuse Status</b> <input type="radio"/> Primary Victim <input type="radio"/> Secondary Victim	<b>Victim Type</b> <input type="checkbox"/> Domestic Violence <input type="checkbox"/> Sexual Assault	<b>Staff</b> <input type="text" value="-- Please Select --"/>

1. Select the Associated Intake for the program you're entering this client data for.

**Associated Enrollment**

<input type="text" value="-- Please Select --"/>
<input type="text" value="-- Please Select --"/>
<input type="text" value="2014-07-24"/>

2. Fill out other required fields.
  - a. Client Type
  - b. Program
  - c. Eligible for HUD funding?
  - d. Service Start Date
  - e. Program Type

## Hotline Call

When "Hotline" is selected under Program Type, the Hotline Call and Hotline Call notes sections will appear.

<b>*Service Start Date</b> <input type="text" value="07/30/2014"/> <input type="button" value="📅"/>	<b>Service End Date</b> <input type="text" value="MM/DD/YYYY"/> <input type="button" value="📅"/>
--	---

**Hotline Call** ▶

**Hotline Call Notes** ▶



## Shelter

If Residential is chosen for *Program Type* or if *Eligible for HUD funding?* is answered with “Yes,” HMIS Background fields will appear.

<b>*Service Start Date</b> 07/30/2014	<b>Service End Date</b> MM/DD/YYYY
<b>HMIS Background</b> ▶	
<b>Income Information</b> ▶	

Some HMIS fields, when the choice of “Yes” is selected, will have additional questions. These will appear in the event that choice is selected.

Physical Disability	<b>*Physical Disability Status</b> Yes ▼
If Yes for 'Physical Disability'	<b>Physical Disability Expected to be of Long-continued &amp; Indefinite Duration; Substantially Impairs Ability to Live Independently</b> --Please Select-- ▼
	<b>Currently Receiving Services/Treatment for Physical Disability</b> --Please Select-- ▼



## Child

When “Child” is selected underneath Client Type on a Program Enrollment, fields specific to a client under 18 will appear. Click the section to expand and fill in these fields.

<b>*Client Type</b> <input type="radio"/> Adult <input checked="" type="radio"/> Child	<b>Service Site</b> -- Please Select -- ▼	<b>*Eligible for HUD Funding?</b> <input type="radio"/> Yes <input type="radio"/> No
<b>*Enrollment Status</b> --Please Select-- ▼	<b>Staff</b> -- Please Select -- ▼	
<b>*Service Start Date</b> 07/24/2014	<b>Service End Date</b> MM/DD/YYYY	
<b>Child Specific Information</b> ▶		

## Departure

When “Exit” is selected for Closure Type on a Program Enrollment, and the Program Type is “residential,” fields specific to a residential client’s departure will appear. Click the section to expand and fill in these fields.

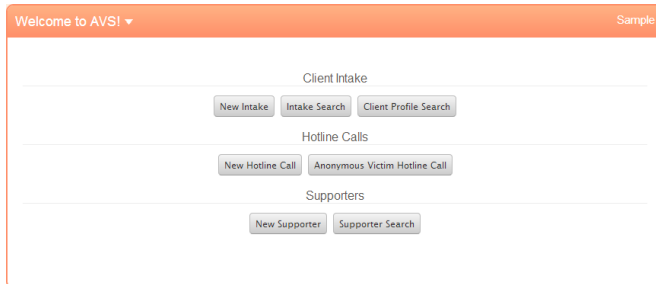
<b>*Service Start Date</b>	<b>Service End Date</b>
<input type="text" value="07/24/2014"/> 	<input type="text" value="07/31/2014"/> 
<b>Departure Information</b> ▶	

## Closure Type

This field is used to select whether a client will be re-enrolled so HMIS information can be updated, or whether the client has left the program. If “Re-Enrollment” is selected, then a new Program Enrollment form should be created for the client. If “Exit” is selected, then departure fields should be completed.

# Anonymous Hotline Calls

To log an anonymous hotline call, simply select “Anonymous Victim Hotline Call” from the My Apricot tab.



This will take you directly to a record named “Anonymous Anonymous” in your AVS.

A screenshot of the "Program Enrollment" form for a record named "Anonymous Anonymous". The form is divided into several sections: "Associated Intake" (dropdown menu), "\*Client Type" (radio buttons for Adult and Child), "\*Enrollment Status" (dropdown menu), "\*Service Start Date" (calendar icon and date field showing 08/18/2014), "Abuse Status" (radio buttons for Primary Victim and Secondary Victim), "\*Program Type" (radio buttons for Non-Residential, Residential, and Hotline), "Service Site" (dropdown menu), "Reason Turned Away" (dropdown menu), "Closure Type" (radio buttons for Exit and Re-Enrollment), "Victim Type" (checkboxes for Domestic Violence and Sexual Assault), "\*Eligible for HUD Funding?" (radio buttons for Yes and No), and "Staff" (dropdown menu).

1. Make the selection of “Hotline” underneath Program Type.
2. Hotline Call fields will appear.
3. Fill out relevant information within those sections.
4. Save the record.

# Client Profile Tier 2 Forms

Client Profile Document Folder

**Paula Test Brown**

QuickView information ▼

Name	Paula Test Brown
Date of birth	06/14/1976
Height (ft)	123
Alert/Loft	Yes
Primary Language	English
Gender	Transgender female to male

**Additional Documents**

Program Enrollment	Actions ▶
Approved Visitors	Actions ▶
Batterer Program	Actions ▶
Bed Enrollment	Actions ▶
Case Notes	Actions ▶
Circle of Care	Actions ▶
Court Case	Actions ▶
Electronic Document	Actions ▶
Financial Assistance	Actions ▶
Goals	Actions ▶
Information Release	Actions ▶
Injury Form	Actions ▶
Legal Charge	Actions ▶
Medical Advocacy	Actions ▶
Payment	Actions ▶
Play Therapy	Actions ▶
Protection Order	Actions ▶
Referrals	Actions ▶
Services	Actions ▶
Sexual Assault Tracking	Actions ▶
Trafficking	Actions ▶
Tracking	Actions ▶
Visitor Log	Actions ▶

---

## Client Profile Tier 2 Form Descriptions

**Batterer Program:** This form is completed when a client is entered into a Batterer Program. Be sure the associated Program Enrollment has “Batterer” selected for Program Type.

**Bed Enrollment:** This form should be filled out when a client is beginning a stay in your shelter. The service site, associated Program Enrollment, and Check-In Date should be selected at the beginning of the stay, and the Check-Out Date should be selected when this client departs.

**Court Case:** This form collects details on a case that a client has in court. Case details and important dates should be added as they're gathered.

**Charge:** This form collects the charges that a client has pending. An associated case form must be filled out first and selected from the case dropdown before information on each charge can be filled out. One form should be created for each charge a client has pending.

**Case Notes:** This form collects case notes about any program your organization offers. The record can be locked by a supervisor to ensure accuracy of entered information.

**Circle of Care:** This form allows you to have a quick reference point for organizations you've sent your client to.

**Electronic Document:** This form allows you to upload electronic documents up to 25 MB to a client's folder.

**Financial Assistance:** This form allows you to enter information on financial assistance your organization has offered to a client.

**Goals:** This form is used to set and track goals for a client, dependent on the categories and goals you have set. The "Goal Status" button should be changed if and when the goal is completed. Goals categories and goals can be created, as seen in [Goal Categories and Options](#) Creating a Goal Category and [Creating a Goal Option](#).

**Information Release:** This document allows you to track the organizations or people that a client has stated information can be released to.

**Injury Form:** This form allows you to attach an image of an injury and associate it to a particular Program Enrollment.

**Medical Advocacy:** This form is used to track information about clients your organization has reached out to for Medical Advocacy.

**Payment:** This form allows you to track payments clients have made to your organization.

**Play Therapy:** This form is used to track individual or group Play Therapy sessions your organization hosts for children. The displayed fields will change depending on whether Individual or Group is selected underneath "Type of Session."

**Protection Order:** This form is used to keep track of filed protection orders, as well as the status of those orders.

**Referrals:** This form is used to track referrals you've given to a particular client.

**Services:** This form is used to collect services, and the amount of time those services have taken, for a particular client. Please note that time must be entered in minutes, and then it will be converted to hours in the box next to minutes. Service categories and names can be customized by creating new records as seen in [Goal Categories and Options](#) [Creating a Goal Category](#) and [Creating a Goal Option](#).

**Sexual Assault Tracking:** This form collects relevant information, as well as follow-up information, for sexual assault victims.

**Trafficking:** This form collects relevant information to clients who have been victims of human trafficking.

**Tracking:** This form can be used to track anything your organization needs to. This can also be done by creating a new form for that particular item. The choices in this can be modified by creating records under Category and Option, as seen in the [Other Categor](#) section.

**Visitation Center:** This form is used for tracking the details of a client's visits to your organization's visitation center. A new form should be created for each visit.

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## Client Profile Tier 2 'Main' Section Fields

**Program Enrollment:** This is a dropdown created from the Program Enrollment forms you have created for a particular client. The dropdown will show the selection that was made under "Program," as well as the date. Make sure to select the program that the form you're filling out is related to.

**Service Site:** This field allows you to select the site the service took place, if your organization has more than one. The choices in this can be modified by creating records under Category and Option, a process you can learn more about in the [Other Categor](#) section.

**Referral:** This field allows you to select the agency that referred a client to your service, if applicable. The choices in this can be modified by creating records under Category and Option, as can be seen in the [Other Categor](#) section.

**Staff:** This dropdown allows you to select the staff member who was associated with a service offered to a client. This field is populated through Supporter records where Staff was selected as type.

# Supporter

This form is where you will enter a new staff member, volunteer, intern, donor, or board member into your system. To get to the Supporter record from the My Apricot tab, open the My Apricot Navigation Menu on the left, then click Supporter.

my apricot administrator customer care help center AVS Demo Final (1425) Jonathan Damrich Administrators Collapse All

Supporter

Main ▾

\*Name 🍌

First Middle Last

\*Type of Supporter

Staff  
 Volunteer  
 Intern  
 Donor  
 Board Member

\*Birthday Month 🍌

--Please Select-- ▾

\*Birthday Day 🍌

--Please Select-- ▾

Email

customer\_care@apricot.ir

Home Phone Number

ext.

Cell Phone Number

ext.

Record Options ▾

Save Record  
Adjust Access  
New Supporter  
Go To Search

Record Save Checklist ▾

Required Field Checks ✖

\*Name 🍌  
\*Type of Supporter  
\*Birthday Month 🍌  
\*Birthday Day 🍌

Field Validation Checks ✔

Staff Details ▶

System Fields ▶

## Creating a Supporter Record

1. Select the correct “Type of Supporter.”
  - a. If this is a staff member, the staff details section will become visible.
  - b. Fill in all required fields.
  - c. Save the record.

---

## Supporter Tier 2 Form Descriptions

### Supporter Document Folder

**Jennifer Watkins**  
QuickView Information ▶

#### Additional Documents

Training Log	Actions ▶
Staff Timesheet	Actions ▶
Donation	Actions ▶
Volunteer Hours	Actions ▶

**Training Log:** This is where you can log training sessions for Supporters. The categories and names of trainings can be changed by creating records in category and option. More information on that can be found in the [Other Categoror](#) section.

**Staff Timesheet:** This is where time can be logged for Staff members. Select the date, category, funder (if applicable), and number of hours, and then use the signature field for manager approval. The signature field is used by clicking sign, then holding down the left mouse button and dragging the cursor through the signature box.

**Donation:** This can be used to track donations from Supporters who have been marked Donor.

**Volunteer Hours:** This can be used to track hours for Volunteers.



# Category and Option

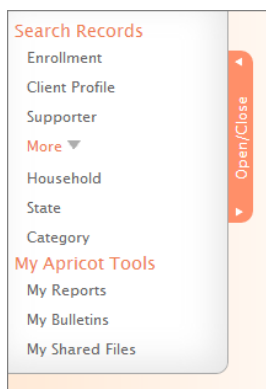
These forms can be used to create new options for selection under dropdowns within the following categories present on other forms.

- Service
- Training
- Goal
- Funder
- Service Site
- Referral
- Court

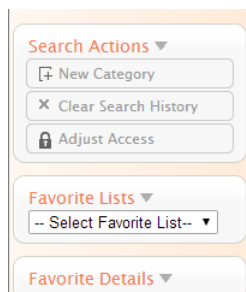
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## Creating New Categories

1. From the My Apricot tab, open the navigation menu on the left side of the screen; Select **More**, then select **Category**.



2. Select New Category from the Search Actions palette on the right side of the screen.



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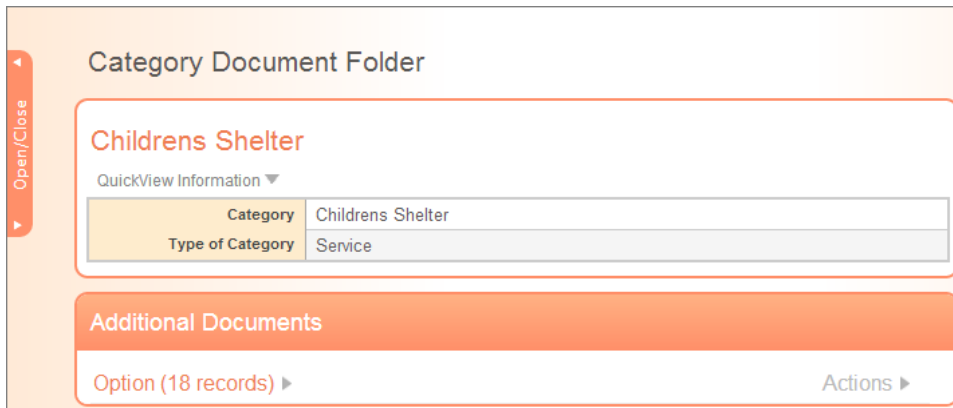
# Service Categories and Options

## Creating a Service Category

1. Enter the name of the Service category you wish to create under Category.
2. Select Service under Type of Category.
3. Save the record.

## Creating a Service Option

1. Go to the Category Search screen.
2. Select the Service Category Tier 1 you wish to create the option underneath.



3. On the same line as option, hover over actions and select **Create New**.



4. Type in the Service Name under 'Option'.

### Option

**Childrens Shelter**

[QuickView Information ▶](#)

**Main ▼**

\* Option

**State Service Type ▼**

A State Service Type can be assigned to a service-related Option that has a specially designated name for state reporting. Select the state below, followed by the associated Service Type.

**1. Select State**

-- Please Select -- ▼

**2. Select Service Type**

▼

5. If this service is related to a particular State Service Type that your state requires for reporting, select your state and the Service Type it's related to within the State Service Type section.
6. Save the record.

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# Goal Categories and Options

## Creating a Goal Category

1. Click New Category under the Search Actions palette on the right side of the Category screen.
2. Type the name of the Goal Category under Category.

The screenshot shows a web interface titled "Category". On the left, there is a vertical sidebar with "Open/Close" and a downward arrow. The main content area has a header "Main" with a dropdown arrow. Below the header, there are two sections: "\* Category" with a text input field containing "Day Care", and "\* Type of Category" with a list of radio buttons: Service, Training, Goal (selected), Funder, Service Site, Referral, and Court.

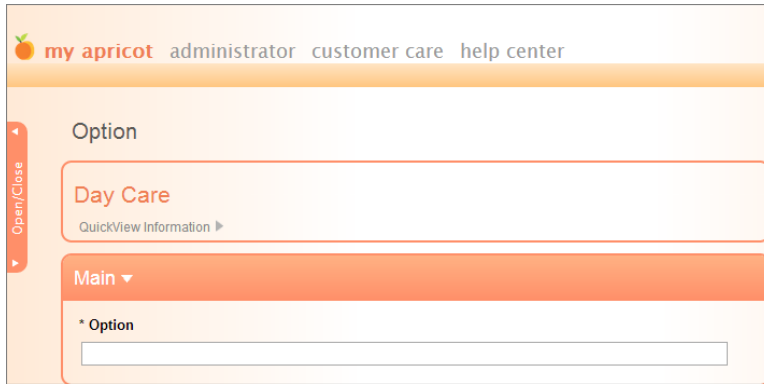
3. Save the record

## Creating a Goal Option

1. Select the Goal Category you wish you create the option underneath on the Category Search screen.
2. From the Category Document Folder, hover over Actions on the same line as Option, then select Create New.

The screenshot shows a web interface titled "Category Document Folder". On the left, there is a vertical sidebar with "Open/Close" and a downward arrow. The main content area has a header "Day Care" and a "QuickView Information" dropdown. Below the header, there is a table with two columns: "Category" and "Type of Category". The first row has "Day Care" in the "Category" column and "Goal" in the "Type of Category" column. Below the table, there is an "Additional Documents" section with a header "Option (5 records)" and a "Create New" button.

3. Type the name of the specific Goal you wish to add to the Goal dropdown in the box under Option.



4. Save the record.

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## Other Categories and Options

1. Click “New Category” under the Search Actions palette on the right side of the Category screen.
2. Type the category you wish to be a choice on other dropdowns under “Category.”
3. Select the dropdown you wish this choice to appear under by selecting “Type of Category.”
4. Save the record.