Change Updates

FRC CRM Database & Materials

Date: 1/1/2025

New CRM Database Sections (accessible on 1/3/2025):

* Contact Logs
* Event/Activity
* Service Provisions
* Providers

New CRM Database/Program Documents:

* FRC Standard Forms:
  + ‘Form A – Family Intake’ was updated to include 3 more referral sources: ‘PATCH’, ‘FRC Event/Activity’, ‘Mutual Self-help Group Walk-in’.
  + You will not see these additional referral source options in the CRM database.
    - All referral source changes mentioned above will be released in the CRM at a later date.
  + ‘Form D – Service Provision’ was updated recently to remove ‘Active Parenting of Pre-Teens’ and add Mutual Self-help Group, ‘Grief’.
    - A major change to this form is the removal of ‘Category D. Social and Networking Activities’ and addition of the ‘Social/Networking Activity or Engagement’ service in the ‘Family & Individual Support’ category. This new service is to be used for an intaked family member’s attendance/engagement at an FRC Event/Activity.
    - All service provision changes mentioned above will be released in the CRM at a later date.
  + ‘Form E – Contact Logs’ was updated recently to incorporate ‘Fax’ and ‘Online Form’ as contact types.
    - All contact log changes mentioned above and more will be released in the CRM at a later date.
  + ‘Form F – Event/Activity’ was updated recently to add ‘Parents’ as a ‘Target Audience’.
    - A major change to this form is the update to ‘Category C: Clinics/Child Safety Program’. The category is now titled ‘Category C: Public Clinics and Workshops’. Category options, ‘Court Clinic’ and ‘Life Skills/Workshop (single session)’, were added.
    - All event / activity changes mentioned above will be released in the CRM at a later date.
* FRC 2025 Services Crosswalk to 2024 & Prior Services
  + A document connecting the previously used service provisions to the 2025 service provisions. There may or may not be a connection between the services.
  + In a word document so your FRC may edit and utilize as needed.
* FRC CRM Database Training Introduction
  + The new introduction PowerPoint that will be used during CRM Trainings in 2025. Contains a lot of useful CRM instructions!
* FRC CRM Database Trainings & Office Hours Calendar
  + If you need any assistance with the transition, please come to office hours or the full database training on January 6!
* FRC PROCESS GUIDE & DATABASE INSTRUCTIONS
  + A full instructional guide on how to use the FRC CRM database throughout the FRC operational service flow.
* FRC DATBASE GUIDE Printable 1-Pagers
  + 1-pager versions of the information in the FRC PROCESS GUIDE & DATABASE INSTRUCTIONS
  + In a word document so your FRC may edit and utilize as needed.
* [**Service Provision & Event/Activity Guidance and Suggestion Form**](https://umassmed.co1.qualtrics.com/jfe/form/SV_1FIC3LsgyPmImZo)
  + Only for FRC Site Management to complete!
  + Form is used to contact the DCF-ASO team about a service or event not listed on the FRC Standard Form and CRM.

Other notes:

* The ASO is working to make a handful of modifications to the FRC CRM Database in late January. These changes are related to feedback received by the FRCs in the Fall of 2024 as well as a few more changes we could not include in this release.