Change Updates

FRC CRM Database & Materials

Date: 2/21/2025

This document provides an outline of recent changes to the CRM database and associated materials.

CRM Database Sections Experiencing Changes (accessible on 2/21/2025):

* Family Record’s Referral Source tab
* Service Provisions
* Contact Logs
* Event/Activity

FRC Standard Form & CRM Changes in Detail:

The FRC Standard Forms have been relatively up to date since they were shared on 1/1/2025. The FRC Standard Forms were updated with the desired changes before the changes could be accessible in the CRM database. All up to date forms (as of 2/21/2025) can be found in English in FRConnect’s resource folder – [FRC Standard Forms](https://www.frcma.org/intranet/resources/frc-standard-forms/).

The only forms experiencing changes since initially shared on 1/1/2025 are Form D – Service Provisions and Form F – Event/Activity. Please see below for a description of these changes.

* Form D – Service Provisions
  + “Positive Discipline” added to ‘Evidence-based Parent Education Classes’ category.
  + “Teen Life Skills Building” added to ‘Life Skills/Education Programs’ category.
  + “Application Assistance” added to ‘Family & Individual Support’ category.
* Form F – Event/Activity
  + “Benefits/Enrollment Clinic” added to ‘Public Clinics and Workshops’ category.
  + “Vaccine Clinic” was changed to “Health Clinic” to be more inclusive to other health related clinics. This change occurred in ‘Public Clinics and Workshops’ category.

The CRM database, as of 2/21/2025, reflects the content changes outlined above and outlined in the Changes Updates document emailed out on 1/1/2025. If you would like to review the previous Changes Updates document, please see the “Change Updates 1.1.2025 – FRC CRM Database & Materials” document in FRConnect’s resource folder - [2025 Revisions – Instructions and Materials](https://www.frcma.org/intranet/resources/2025-revisions-instructions-and-materials/).

Additionally, a new type of resource material has been created to visually see the changes implemented in the CRM as of 2/21/2025. Please navigate to the file, “Feb 2025 CRM Changes Highlighted on FRC Standard Forms” in FRConnect’s [2025 Revisions – Instructions and Materials](https://www.frcma.org/intranet/resources/2025-revisions-instructions-and-materials/). Here you will find the 4 FRC Standard Forms that experienced changes. The ASO highlighted all the additions or edits made in the CRM in yellow. (Note: Any changes that entailed removing content would not be highlighted in these forms. Only additions or content edits are highlighted.)

Additional Notes:

Please keep in mind, with 2 of the changes, you will see a slight difference in your CRM records.

1. All Event/Activity records that were assigned as “Vaccine Clinic” will now display as “Health Clinic”. This is still accurate documentation of any vaccination clinics your FRC had. “Health Clinic” was implemented to be a more inclusive option for health-related clinics.
2. All Service Provision records that were assigned any service provision in category “D. Social and Networking Activities” have been automatically updated to display as the “Social/Networking Activity or Engagement” service provision in category “D. Family & Individual Support”. This is still accurate documentation of any social/networking activities members engaged in, now in just one specific service rather than a full category.

The ASO is working to more modifications to the FRC CRM Database in the next month or so. These changes are related to feedback received by the FRCs since January 1, 2025 via email, in meetings, or through the [Service Provision & Event/Activity Guidance and Suggestion Form](https://umassmed.co1.qualtrics.com/jfe/form/SV_1FIC3LsgyPmImZo).