Change Updates

FRC CRM Database & Materials

Date: 4/11/2025

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

CRM Database Sections Experiencing Changes (accessible on 4/11/2025):

* Service Provisions
* Contact Logs
* Event/Activity

FRC Standard Form & CRM Changes in Detail:

The FRC CRM database as well as FRC Standard Forms have been simultaneously updated as of 4/11/2025. All up to date forms can be found in English in FRConnect’s resource folder – [FRC Standard Forms](https://www.frcma.org/intranet/resources/frc-standard-forms/).

Please see below for a description of these changes.

* Service Provision section & Form D – Service Provisions
  + “Play and Learning” added to ‘Basic Needs’ category.
  + “Special Education” added to ‘School Related Services & Supports’ category.
  + “Furniture” was updated to “Furniture (e.g., chairs, bedding, appliances)” in the ‘Basic Needs’ category.
* Event/Activity section & Form F – Event/Activity
  + “General Anonymous Group (e.g., AA, NA, Alanon, Alateen)”, “Child/Youth Development”, and “Immigration/New Arrival” added to ‘Category C. Public Clinics and Workshops’.
    - Note: Please only use “General Anonymous Group (e.g., AA, NA, Alanon, Alateen)” for anonymous mutual self-help groups. If your FRC does not offer these types of groups, then please do not use this event type.
  + “Provided Space” added to “Describe FRC’s Role” drop-down list.
    - Note: This option is used for when your FRC provides space for another organization to run an event/activity and your FRC staff are not engaged in conducting the event. Please reach out to FRCHelp if you have any questions at all about this!
  + All 17 count fields in the ‘Basic Goods Distributed’ section were removed.
  + Term “clinic” from each event/activity title within Category C. Public Clinics and Workshops was removed.
* Contact Logs section & Form E – Contact Logs
  + “Virtual” added to “Contact Type” drop-down list.
  + “Grief” added to “Select Mutual Self-Help Group” drop-down list.

A new type of resource material is available to visually see the additions implemented in the CRM as of 4/11/2025. Please navigate to the file, “April 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 3 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:

There are a few additional changes to note outside the ones listed above. They are:

1. Note: All service provision records in the CRM that were for “Clerical Support” under the ‘Individual & Family Support’ category have been automatically reassigned to “Miscellaneous Clerical Support (Faxing, Photocopy)” in the ‘Basic Needs’ category.
2. Additional Provider lookup fields were added to service provision and service date records. These additional lookup fields are optional, and you only have to use them if you need them (i.e., you referred a person to Clothing Provider 1 and Clothing Provider 2 on the same service date).
3. The “Service Provision Initially Managed by” “Service Provision Currently Managed by” fields will now automatically fill in the user account that created the record. If needed, you can easily remove that user from the field and input a different FRC staff member.

These changes are related to feedback received by the FRCs email, in meetings, or through the [Service Provision & Event/Activity Guidance and Suggestion Form](https://umassmed.co1.qualtrics.com/jfe/form/SV_1FIC3LsgyPmImZo).

If you would like to review the previous Changes Updates document, please see the “Change Updates (date) – 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/).