

**FRC DATABASE GUDE
Printable 1-Pagers**

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# Signing into the FRC CRM Database

To sign into the FRC CRM Database, navigate to your preferred browser and open an Incognito or InPrivate browsing window. Outlined below is how to sign in using Google Chrome Incognito.

If you need further information on managing your @Community-Family.org account. Please see the *Community-Family Homepage Sign in Instructions*.

1. Open a Google Chrome window. Select the 3 dots in the top right corner. Select “**New Incognito Window**”.
2. Copy and paste the following link into the search bar. [https://myapps.microsoft.com](https://myapps.microsoft.com/)
3. Enter your “@community-family.org” username, then select “**Next**”. On the following screen, enter your personalized password, then select “**Sign in**”.
4. Select a method to verify your identity.
	* If you choose to receive a call, follow the steps on the phone call.
	* If you choose to receive a text, enter the 6-digit code you received into the provided box. Then select, “**Verify**”.
5. The Community-Family Homepage will appear, and you will see the proper applications you have access to. The FRC CRM Database is the icon with the FRC logo and “Family Resource Center” title.

# Contact Logs

Is for:

* Preliminary communication with a person that has not yet completed a FRC intake
	+ Mutual Self-help Group walk-ins
* Contact with a person that does not need to or does not want to complete a FRC intake
	+ If upon meeting, FRC staff engage the person in an intake, do not use the contact log. Move directly into the family and family member intake process.
* Contact with an agency/organization to
	+ answer general questions
	+ coordinate to collaborate on an event
	+ receive a referral
* FRC staff f/u on a referral or inquiry

Is not for:

* Documenting services or communication with a family member that has completed a FRC intake
* Event / Activity attendance
* The FRC engaging in community meetings (i.e. Systems of Care meeting, HUB meeting)

Contact Log Field Descriptions:

1. Incoming or Outgoing: Incoming contact = the FRC received the contact. Outgoing contact = the FRC initiated the contact.
2. Contact provided in what language(s)?: The language(s) used in order to have the contact.
3. Contact Name & Information: Name and any contact info the FRC has for the person they are in contact with. It is okay to not indicate any if the person really does not want to share
4. Contact is: Agency/provider = the person is a staff member at another agency/provider. Parent/Community Member = the FRC is in contact with a general person in the community.
5. Is this contact a result of any of these situations?\*: Contact related to or because of an emergency or unforeseen event. If the contact is unrelated, select “Not Applicable”.
6. Reason for Contact: Indicate all reasons for the contact.
	* ‘Agency/Provider Referral to FRC’: Another agency/organization referred a family or individual to your FRC.
	* ‘Follow-up on Referral’: Parent/community member, agency/organization, or FRC staff are following up on an existing referral to or from your center.
	* ‘Referral Out to Agency/Provider’: Parent/community member was referred to another agency/organization for services. Not all 3 pop-up fields require data entry.

# Family Record

Family record: The intake for a family/individual that came to the FRC for the first time for direct services and support.

Do not create duplicate family records in the CRM. Update the existing record.

Family Record Field Descriptions:

1. Address 1: Street 1: The family’s address. If the family is frequently transient or is experiencing homelessness, write in a note instead of an address.
2. City: The city the family lives in. If the family is frequently transient or is experiencing homelessness, select the city your FRC is located in. It is essential this data point is filled in because it is reported on in the FRC Monthly Tableau Report.
3. Total number of children/youth living in household\*: The number of children/youth actively living in the family’s household. If the family is renting a section of the home, report on the number of children related to the family being intaked.
4. Total number of household members\*: The number of members, children and adults, actively living in the household. If the family is renting a section of the home, report on the number of family members related to the family being intaked.
5. Referral Source tab: Indicate all of the referral sources for the family and its members.
6. Family-Family Strengths and Needs Assessment: The first half of the assessment the FRC Clinician conducts while working with at-risk CRA/CRA youth and families.
7. Family Support Plan: A plan for documenting goals the family has identified along with service provisions that will help them achieve those goals.

# Family Member Record & Adult/Child Screenings

Family Member records: For any family member apart of the family whether or not they are engaged with your FRC and receiving services.

* If the family member *is not* engaging with your FRC, leave “Services Needed” as ‘No’.
* If the family member *is* engaging with your FRC, change “Services Needed” to ‘Yes’, and continue to answer all the remaining intake questions that appeared.

Adult (18+) or Child (17 & under) Screening records: Only to be completed if the family member is receiving direct FRC services or an external provider referral. Meaning, their family member record has “Services Needed” indicated as ‘Yes’ and they have an “Initial Contact Date”.

Family Member Record Field Descriptions:

1. Birthdate⁺: Family member’s birthday. If an individual is hesitant to share this information, it is acceptable to provide an accurate birth year then indicate the month and date as January 1.

NOTE: The remaining fields are only accessible if “Services Needed” is changed to ‘Yes’. The remaining fields mean a full intake is being done with the member and they will receive services and/or referrals from the FRC.

1. Initial Contact Date\*: The first date the family member began the family member intake.
2. Primary Contact & Secondary Contact: Indicate if this specific family member is the overall family’s primary or secondary contact. If this member is not either, leave both fields as ‘No’.
3. Information Different from Primary Contact: Indicate if this specific family member does not live at the same address identified on the overall family’s record. If ‘Yes’ is indicated, additional fields will display to specify the family member’s address.
4. Family Member Status & Marital Status: Allow the family member to identify their information.
5. CRA Related Questions: Indication of the FRC’s understanding of the child’s CRA/at-risk CRA status. Tab only appears if member record’s “Age” field states a number 17 or under. Fields will lock after initially answered, except for FRC Site Management and FRC Clinician.
6. Reason for Visit tab: Indicate one or more reasons the family member is there to receive direct FRC services and/or an external provider referral.
7. Preferences tab: Optional information to collect and enter related to the family member’s contact preferences and FRC status.
8. Adult and Child Screening Record’s “Date” field: Enter the date the screening began. Try to have the screening begun within 30 days of the “Initial Contact Date”.

# Service Provisions

Service Provision records: each date an external provider referral or direct FRC service is given to a family/member

Service Date records: each date a family/member engages with the same exact pre-existing service provision record

Service Provision Menu Options:

* “Active Service Provisions (Associated)” and “Active Service Provisions (Default Public)” are the same view and display services dated 1/1/2025 and beyond.
* “All Service Provisions” displays both the “Active Service Provisions” and “Legacy Service Provisions” in one centralized view.
* “Legacy Service Provisions” displays services dated 12/31/2024 and prior. Note these records are only viewable and cannot be edited

**Service Provision Field Descriptions**:

1. Initial Date of Service: first date the member engaged with the service, resource, or program. Note this field will lock after saving the record.
2. Service Provided By: was this service, resource, or program provided by directly FRC Staff Only, an External Partner, or a collaboration between FRC staff and an external partner simultaneously.
3. Service Provided During: In the instance this service is related to an emergency or unforeseen consequential event, select the according option. If it is unrelated, select “Not Applicable” from the drop-down list.
4. Select the “Category” the service exists in, then select the specific “Service Provision” from the provided drop-down menu.
	* NOTE: “Other” is no longer an option. If you do not see the service, resource, or program you need, please consult with your FRC Site Management.
	* “AAPI Indicators” appear at the bottom of the page category, ‘Evidence-Based Parent Education Classes’ is selected. Each time an AAPI indicator is completed, check the appropriate box and indicate the date the action or form was completed.
5. Service Provision Initially Managed By: FRC staff person managing the direct service or giving the external provider referral.
6. FRC Service Provision Nickname: open text space to further identify the service, resource, or program. For example, specifying “Youth LGBTQ+ Group” and “Adult LGBTQ+ Group” if your FRC provides both groups.

# Entering the FSNA or a ‘Declined FSNA’ Service Provision

\*Please refer to pages 9 through 12 in the *FRC Operational Guide* for detailed information and guidance on working with CRA/at-risk CRA youth and families.\*

NOTE: Only the FRC Clinician can conduct a Family Strengths and Needs Assessment. Based on the family’s preference, the Family Partner may assist this process by providing support to the family.

**To enter a FSNA information**:

1. Check the child’s family member record correctly indicates the child’s status under the “S2-CRA Related Questions” tab.
2. Next, either:
	* Enter the Family portion (in the family record) and/or Child portion (in the child’s family member record) of the Family Strengths and Needs Assessment (FSNA).
		+ Also enter a ‘Family Strengths and Needs Assessment’ service provision in the appropriate family member’s records.
	* Enter a ‘Declined Family Strengths and Needs Assessment (FSNA)’ service provision into the identified CRA/at-risk youth’s family member account.

# Family Support Plan

\* Please refer to pages 11 through 12 of the *FRC Operational Guide* for detailed information and guidance on working with CRA/at-risk CRA youth and families.\*

Located in the Family record.

This plan documents goals the family has identified along with service provisions that will help them achieve those goals.

**Create a plan for**:

* Any intaked family that wants one. Any FRC staff member may work with a family on this plan.
	+ Make sure to create a note and upload a copy of the plan into the CRM!
* An identified CRA/at-risk CRA youth and family. The clinician and/or family partner is responsible for these family support plans.
	+ A copy of this plan must be uploaded into the CRM in the plan’s notes section.
	+ If an identified CRA/at-risk CRA youth and family engage or deny engagement with this plan, (depending on the details of the situation) also enter a ‘CRA Family Support Plan’ or ‘Declined CRA Family Support Plan’ service provision in the youth’s and/or parent’s member records.

**Family Support Plan Fields Descriptions**:

* + - * 1. Plan Original Date: The date the plan was created.
				2. Plan Modified Date(s): The date the plan was modified or updated.

\*If plan is CRA/at-risk CRA related, it is essential the “Plan Original Date” and according “Plan Modified Date(s)” in the CRM are on or after the identified child/youth’s “CRA Indicator Last Set On Date”.

# Event/Activity

**Is for**:

* Documenting outreach and engagement events/activities open to the general public hosted by the FRC or another organization the FRC collaborates with
	+ Participants may or may not have completed intakes at your center.
	+ If they have completed an intake, you may also document their event/activity engagement or receival of a basic good at the event/activity as a service provision in their account (see the Family & Individual Support – Social/Networking Activity or Engagement service provision as well as Basic Needs category).
* When FRC staff table at another organization’s event / activity

**Is not for**:

* The FRC hosting or attendance at community meetings (e.g., Community Care Meetings, Hub)
* Documenting FRC basic services and programming such as:
	+ EVB Parenting Education Classes
	+ Mutual Self-Help Groups
	+ Life Skills/Workshops *(2+ sessions regarding same topic)*

**Event/Activity Field Descriptions**:

* + 1. Staff Language(s) Offered?: The language(s) used at the event/activity to communicate with attendees.
		2. # of People Registered: If there was a registration for this event/activity, provide the number that registered.
		3. # of Attendees: Provide the number of participants that attended or engaged with the event/activity.
		4. Is # of Attendees an Actual or Estimated count?: Indicate if the number is a precise count (actual) or an approximate (estimated) count.
		5. Was a basic good offered at the event?: Indicate if a tangible basic need was given to a family/individual at the event/activity.
		6. (if ‘Yes’ to #5) Please select the basic good(s) offered & # of…: Select one or more types of basic need(s) given out at the event/activity. Then for each type of basic need given, provide the total number given.
		7. What methods were used to engage attendees?: Select one or more methods used to support families in attending the event/activity.
		8. Did other agencies table at the FRC event (not one of the agency collaborators)?: Indicate if another agency attended the event to provide information on their organization to the event/activity attendees.
		9. (if ‘Yes’ to #20) How many agencies?: Provide a total count of the agencies that attended.

# Acronyms

Family Resource Centers, DCF, and UMass Chan’s ASO team use a lot of acronyms. See the most commonly used acronyms below.

* AAPI = Adult Adolescent Parenting Inventory
* ASO = Administrative Service Organization (aka ForHealth Consulting team at UMass Chan Medical School)
* CCC or CC = Community Connections Coalition
* CCWT = Center on Child Wellbeing and Trauma
* CRA = Child Requiring Assistance
* CRM = Client Relationship or Record Management (another name for the FRC database)
* CSM = Community Support Managers (Regional FRC Managers at DCF)
* DCF = Department of Child and Family
* DDS = Department of Developmental Services
* DMH = Department of Mental Health
* DTA = Department of Transitional Assistance
* DYS = Department of Youth Services
* EB or EVB = Evidence-based (usually seen as, EB-Parenting Education Program)
* EOHHS = Executive Office of Human and Health Services
* EOHLC = Executive Office of Housing and Livable Communities (new title for DHCD – Department of Housing and Community Development. May also be referred to as HLC for short)
* FACRA = Families and Children Requiring Assistance Advisory Board
* FHC = ForHealth Consulting (aka UMass Chann or ASO)
* FRC = Family Resource Center
* FRCMA.org = The FRC network’s public facing website
* FSNA = Family Strengths and Needs Assessment
* FSP = Family Support Plan
* GRG or GP = Grandparents Raising Grandchildren
* JDAI = Juvenile Diversion Alternatives Initiative
* OCA = Office of the Child Advocate
* PMPD = Program Management and Practice Development
* RFR = Request for Responses
* SSO = Single Sign-On (the way the FRC staff sign into their @community-family.org accounts)
* SSYI = Safe and Successful Youth Initiative
* TAY = Transition Age Youth