Family Resource Centers

FRC PROCESS GUIDE

and

DATABASE INSTRUCTIONS

Family Resource Centers

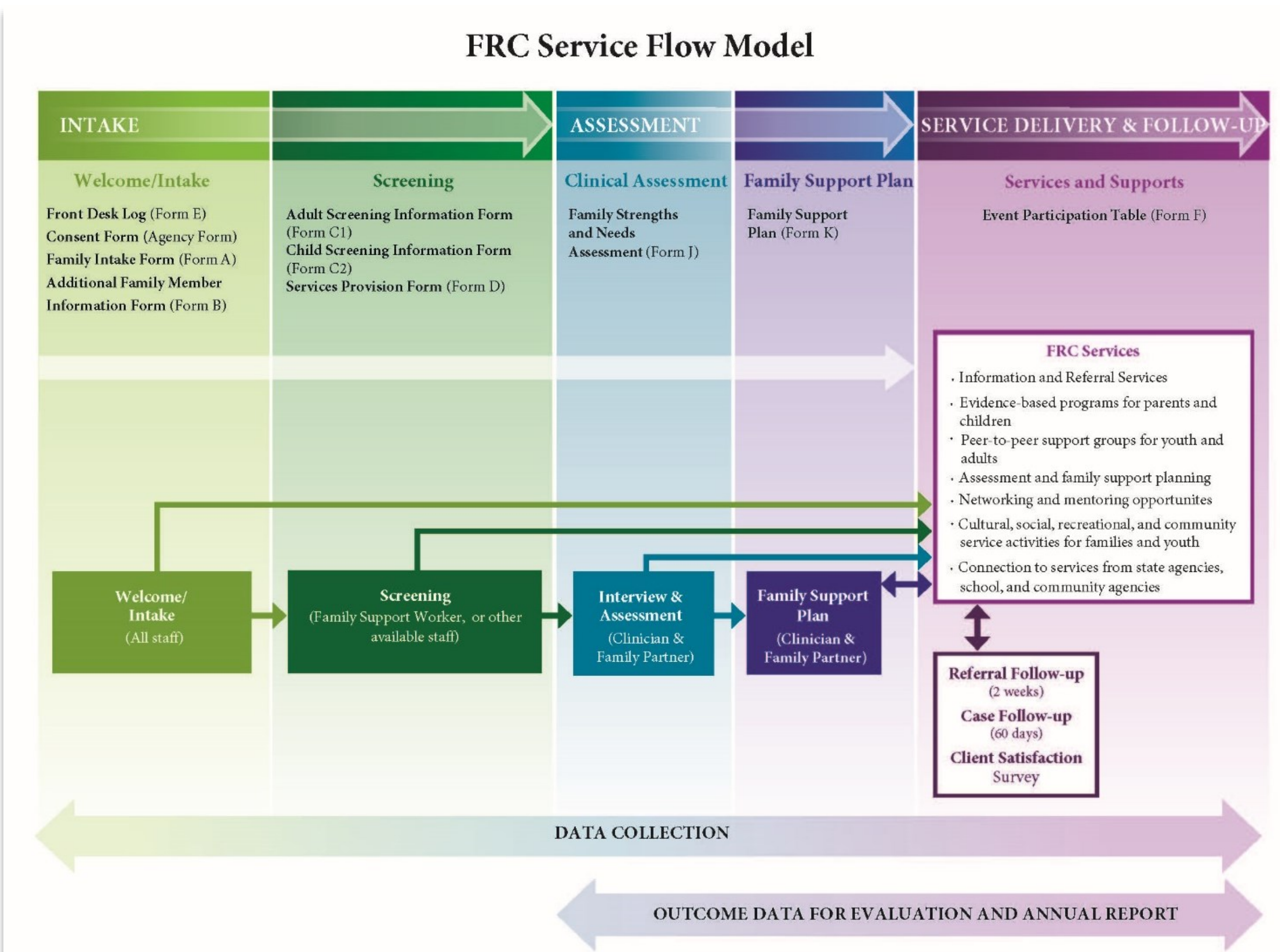
FRC Process Guide and Database Instructions Introduction

The purpose of the *Family Resource Center Process Guide and Database Instructions* is to provide information on how the foundational FRC service flow aligns with the FRC CRM Database and how to document work at the FRC and with families in the FRC CRM Database.

Below is the program's "FRC Service Flow Model" (see the *FRC Operational Guide* for further FRC operational information). This is a visual representation of the program's sequence of steps to client service delivery.

The FRC CRM Database is a Microsoft Dynamics 365 Client Record Management (CRM) System accessible online from any location at any time. Utilizing this database allows for a more efficient, streamlined process in managing data and is the foundation for all FRC data reports provided by the Administrative Service Organization (ASO).

The FRC CRM database mirrors the program's forms, also known as the FRC Standard Forms. Notice how each FRC standard form plays a role in the different sections of the "FRC Service Flow Model" below. Continue through this guide to understand how to find and enter these forms into the FRC CRM database.



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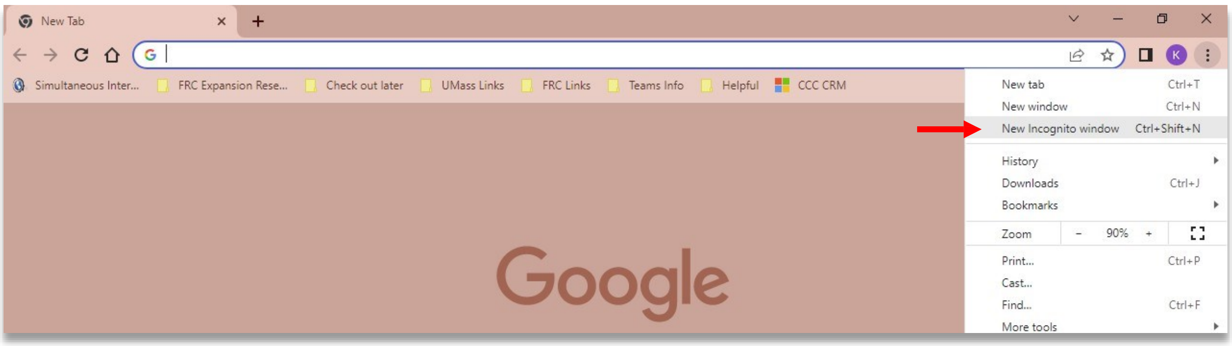
A. Signing into the FRC CRM Database

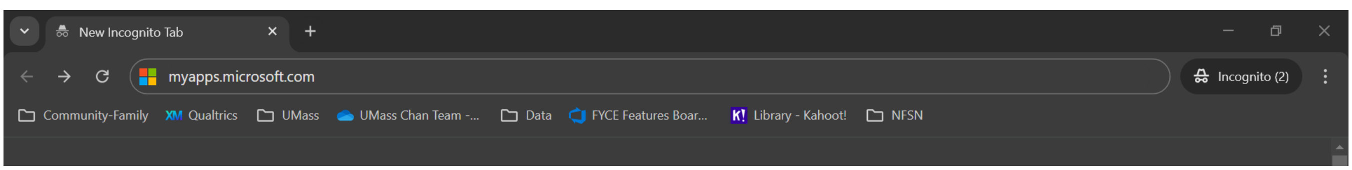
To sign into the FRC CRM Database, navigate to your preferred browser and open an Incognito or InPrivate browsing window. Outlined below is how to sign in using Google Chrome Incognito.

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

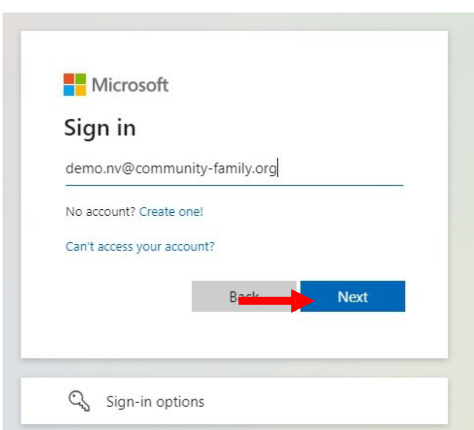
1) Open a Google Chrome window. Select the 3 dots in the top right corner. Select "**New Incognito Window**".

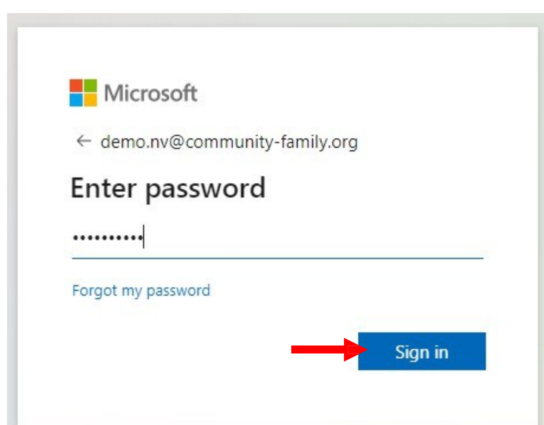


2) Copy and paste the following link into the search bar.
   https://myapps.microsoft.com

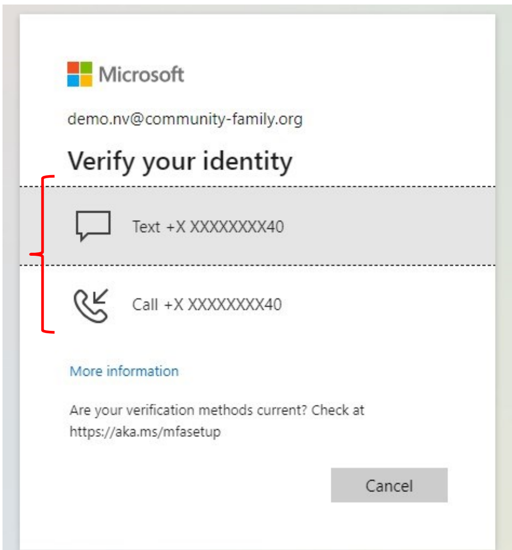


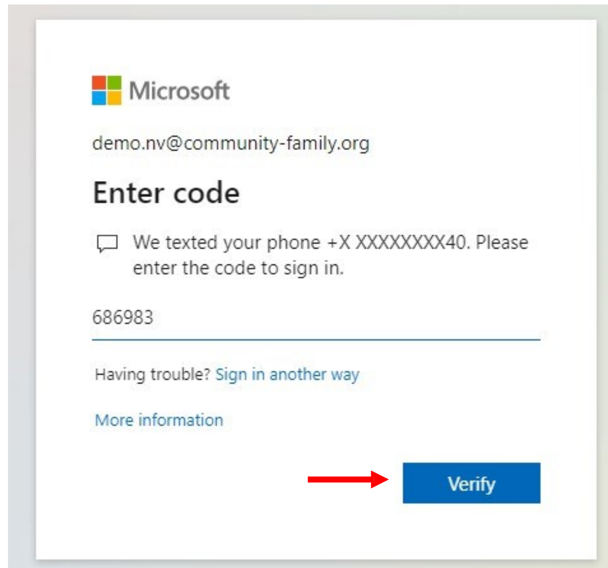
3) Enter your "@community-family.org" username, then select "**Next**". On the following screen, enter your personalized password, then select "**Sign in**".



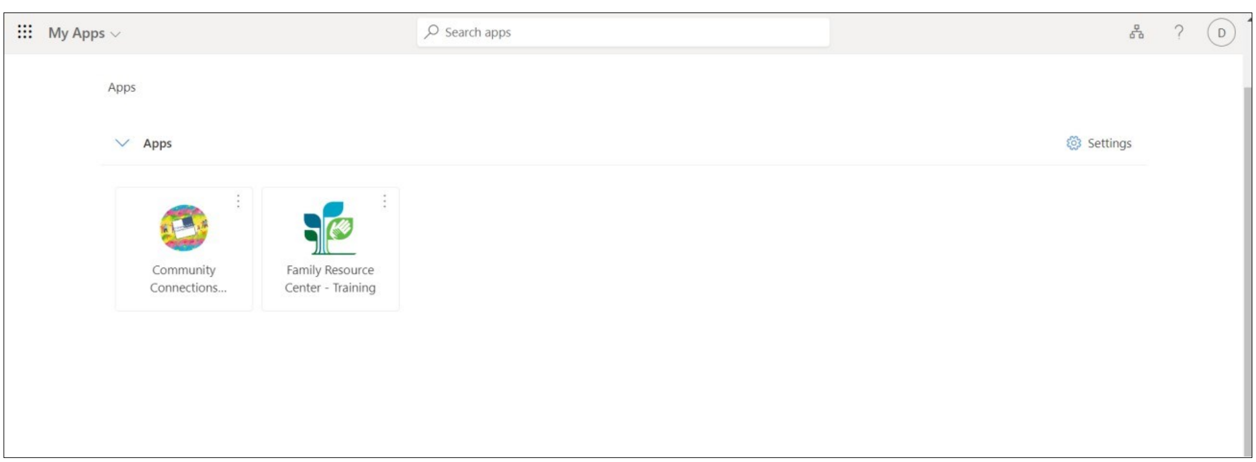


4) Select a method to verify your identity.
   - If you choose to receive a call, follow the steps on the phone call.
   - If you choose to receive a text, enter the 6-digit code you received into the provided box. Then select, "**Verify**".





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.



B. Contact Logs

A Contact Log, also known as **FRC Standard Form E – Contact Log**, is created when there is contact with a person or family that has not already or does not want to engage with the intake process as well as when there is contact with another organization or agency unrelated to an already intaked family member.

If the person making the call or visit is a parent/caregiver, make the effort to engage the individual/family and if appropriate, conduct an intake. Once a person or family engages with the intake process, do not use the Contact Log to document contact with that person or family.

Contact Log examples are, but not limited to:

- Agency/provider calling on behalf of a non-FRC intaked individual/family for resources/referrals
- Agency/provider contacting FRC to learn more about their services, resources, or programs offered
- Agency/provider or individual/family donation to FRC
- Court/probation contacting FRC to check-in on a referral
- FRC contacting individual/family because they were referred to the FRC by an agency/provider
- FRC Staff contacting a New Arrival individual/family that does not want to engage with an intake
- FRC staff coordinating with another agency/provider to table at their event
- FRC Staff received a referral via phone from a probation officer
- FRC Staff received a FRCMA.org email referral
- FRC Staff shares information to School Counselor for non-English speaking family
- Non-intaked individual expressing interest or initial registration in Parenting Education Class
- Non-intaked individual participating in a Mutual Self-help group
- Non-intaked individual/family asked for information on a local CNA Training Program. FRC Staff gave client information to MassHire.
- Non-intaked individual/family called asking to sign up for Community Baby Shower (or general event/activity)
- Non-intaked individual/family called asking to sign up for ESOL class
- Non-intaked individual/family lost housing due to fire and FRC staff provided information on where to find clothing
- Non-intaked individual/family wanting FRC Calendar/brochure

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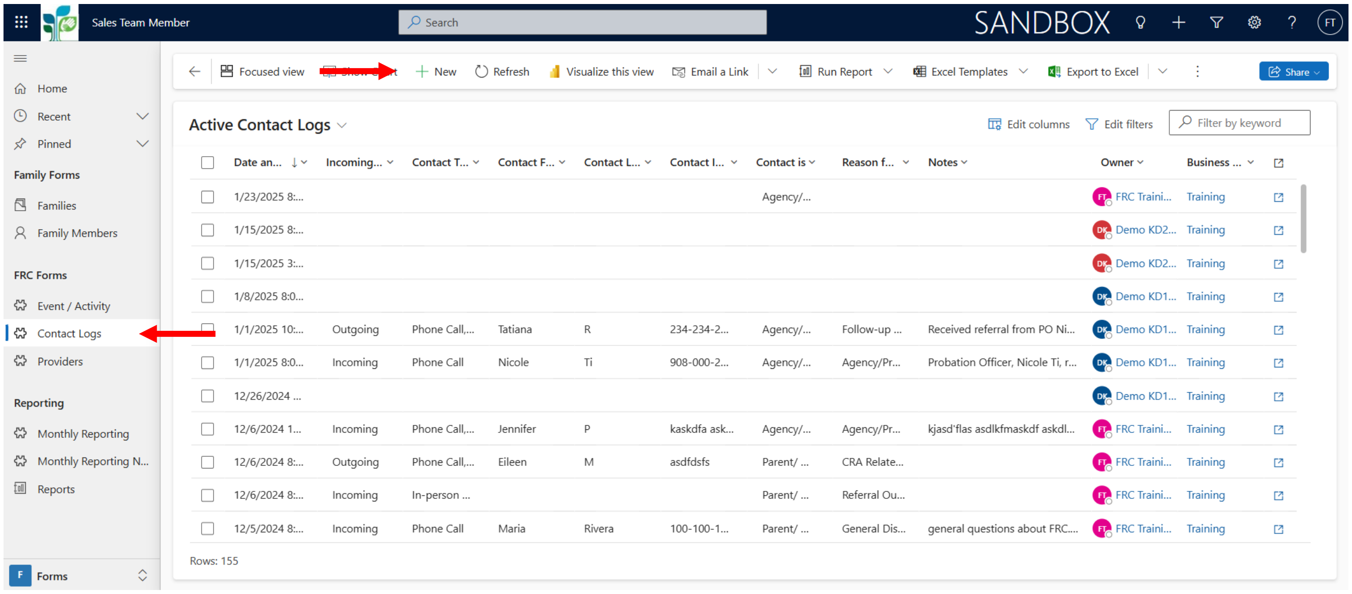
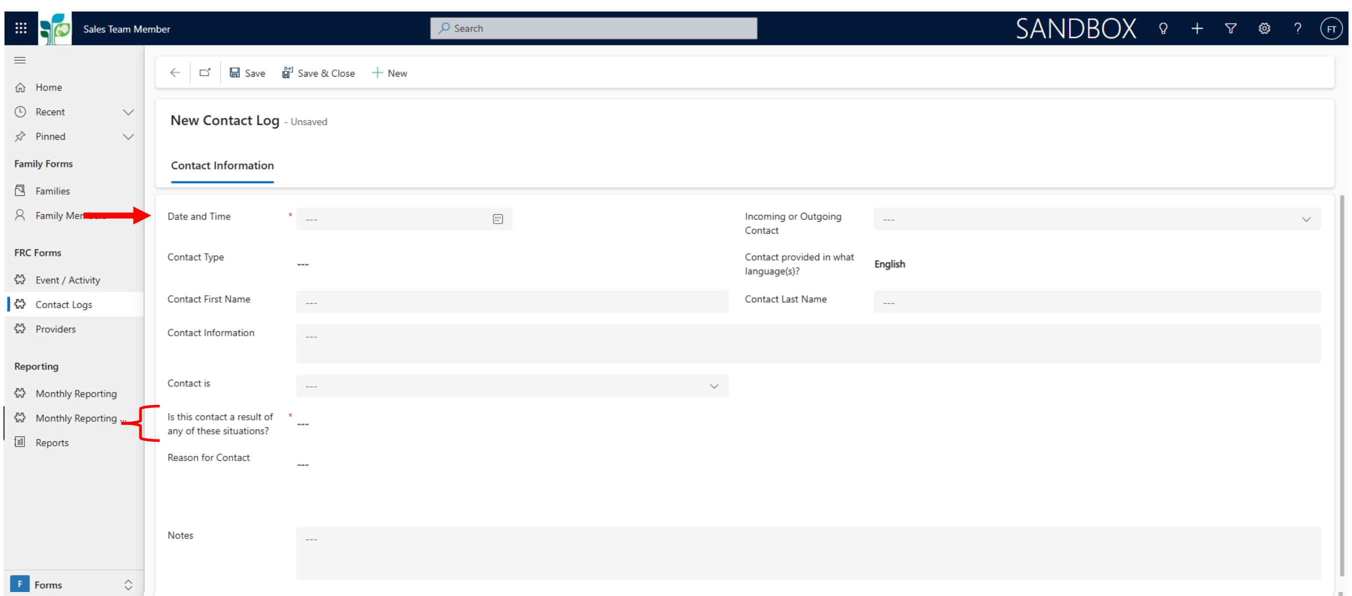
To create and a Contact Log record:

1) Select “**Contact Logs**” on the left-hand navigation bar to navigate to the “Active Contact Logs” page. Select “**+New**” at the top of the page to create a new record.



2) Fill in all relevant information related to the contact.
- The required fields to save a Contact Log record are the “**Date and Time**” and “**Is the contact a result of any of these situations?**”.
- See section “Contact Log Field Definitions” for more information on each field.



Contact Log Field Definitions

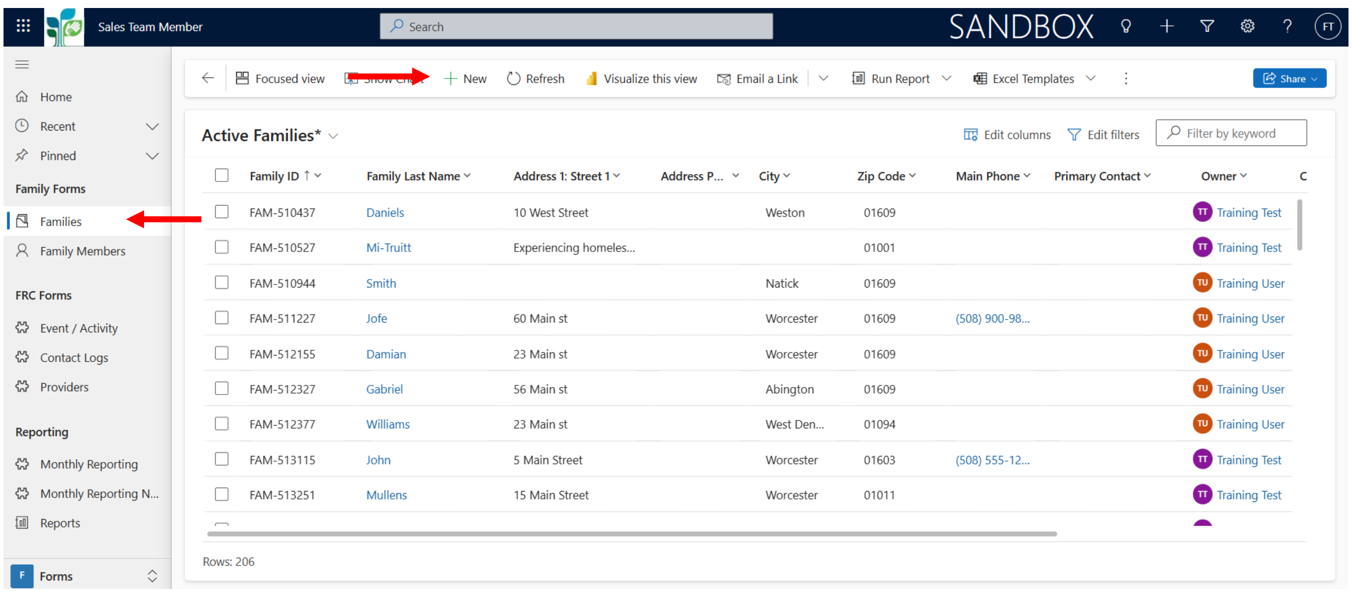
1) Date and Time*: The date and time of the contact.
2) Incoming or Outgoing: Incoming contact means the FRC received the contact, whereas outgoing contact means the FRC initiated the contact.
3) Contact Type: The type(s) of contact used in order to communicate with the person.
4) Contact provided in what language(s)?: The languages used in order to have the contact.
5) Contact First Name: The first name of the person the FRC is in contact with.
6) Contact Last Name: The last name of the person the FRC is in contact with.
7) Contact Information: Any type of contact information the FRC has for the person they are in contact with.
8) Contact is: Agency/provider means the person the FRC is in contact with is a staff member at another agency/provider, whereas Parent/Community Member means the FRC is in contact with a general person in the community.
9) (if 'Agency/Provider' is selected in #8) Select the agency/provider: Indicate the agency/provider from the drop-down list.
10) Is this contact a result of any of these situations?*: Indicate if this contact is related to or because of an emergency or unforeseen consequential event. If the contact is unrelated, select "Not Applicable".
11) Reason for Contact: Indicate all reasons for the contact.
12) (if 'Mutual Self-Help Group Walk-in' was selected in #11) Select the Mutual Self-Help Group:
13) (if 'Referral Out to Agency/Provider' is selected in #11) Select the agency/provider 1: Indicate the agency/provider the parent/community member was referred to from the Provider list.
14) (if 'Referral Out to Agency/Provider' is selected in #11) Select the agency/provider 2: Indicate the agency/provider the parent/community member was referred to from the Provider list. Not all 3 fields are required to be filled out.
15) (if 'Referral Out to Agency/Provider' is selected in #11) Select the agency/provider 3: Indicate the agency/provider the parent/community member was referred to from the Provider list. Not all 3 fields are required to be filled out.
16) Notes: Utilize the notes section as you see best fit.

C. Family Record – Beginning the Intake Process

Families that come into the FRC for the first time for direct services and support will engage in an intake known as **FRC Standard Form A – Family Intake**. This form documents information that applies to one or more family members in the household and must be entered into the FRC CRM database before an individual family member intake. In the FRC CRM, a Family intake begins by creating a Family record.

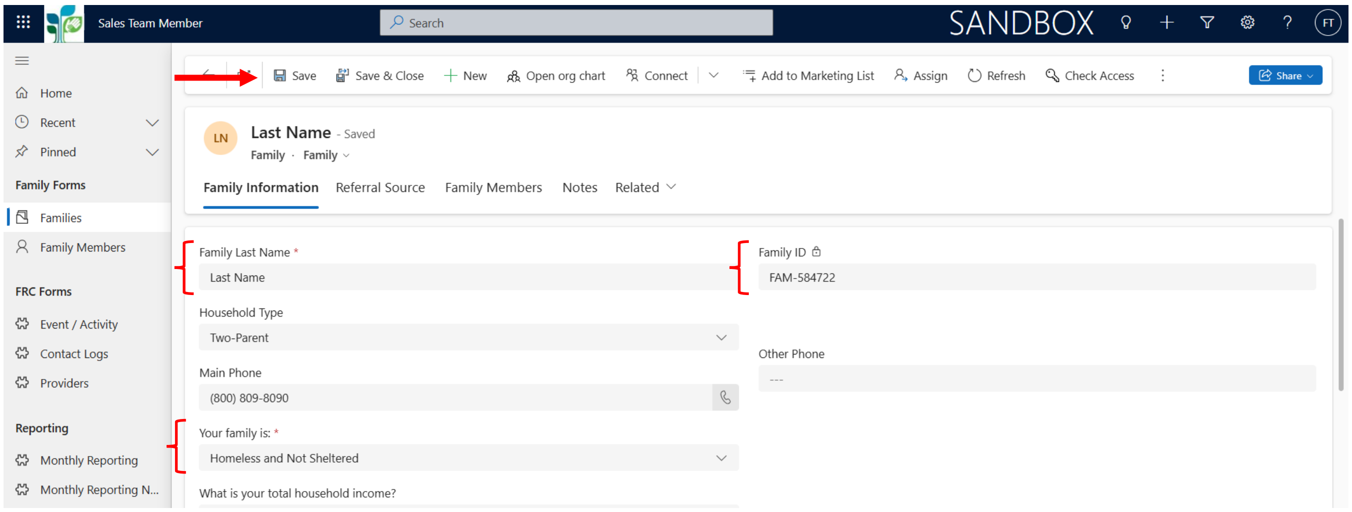
To enter a Family intake:

1) Select “**Families**” on the left-hand navigation bar to navigate to the “Active Families” page. To create a record, select “**+New**” at the top of the page.



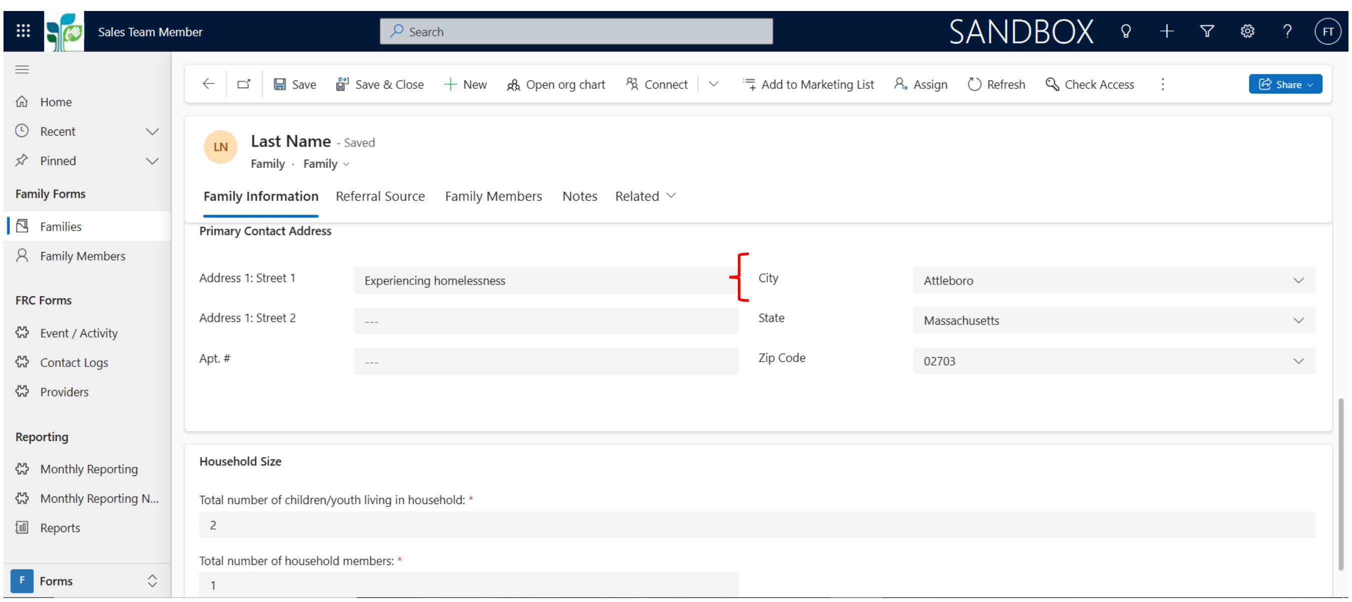
2) Fill in the family's information and once finished, select "**Save**". A Family ID will auto-generate in the space to the right of the "Family Last Name". This confirms the family record now exists in the CRM.

- The required fields to save a Family record are the "**Family Last Name**", "**Your Family is**", and both "**Household Size**" questions.
- See section "Family Record Field Definitions" for more information on each field.

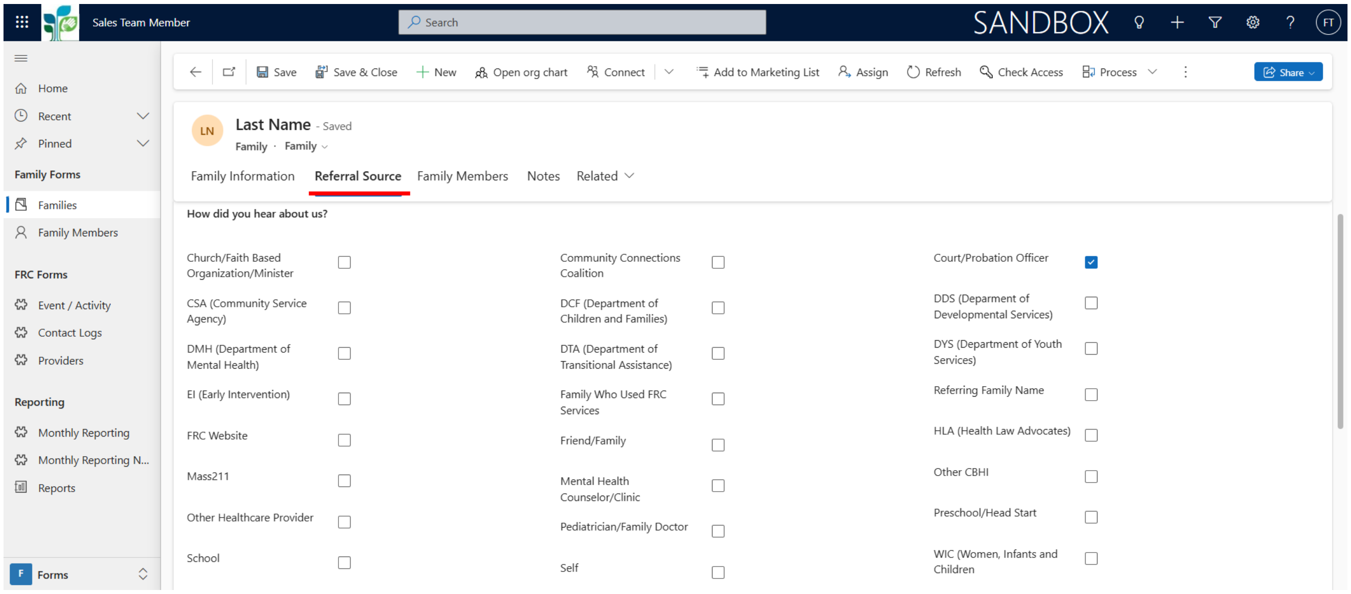


3) Although not a required field, "**City**" is also an important field to have answered.

- If the family does not have a permanent address, please enter the city your FRC is located in and utilize the "**Address 1: Street 1**" field as needed to note the situation.



4) Once complete with the “Family Information” tab, continue to the **“Referral Source”** tab. Although not required, indicating at least one referral source for a family is essential.



5) The remaining tabs in the Family record are “**Family Members”**, “**Notes**”, “**Family – Family Strengths and Needs Assessments**”, and “**Family Support Plans**”. The “**Notes**” tab does not have specific instructions and may be used as needed. The remaining three sections are covered in Sections D, G, and H of this guide.

Family Record Field Definitions

1) Family Last Name*: The family’s last name.
2) (Locked) Family ID: Once the family record is saved in the CRM database, a unique identification number is automatically assigned.
3) Household Type: Details about the family’s current living situation.
4) Your family is*: Details about the family’s current living situation.
5) What is your total household income?: Details about the family’s current living situation.
6) 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.
7) 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.
8) 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.

9) 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.
10) Referral Source tab: Indicate all of the referral sources for the family and its members.

D. Family Member Record – Continuing the Intake Process

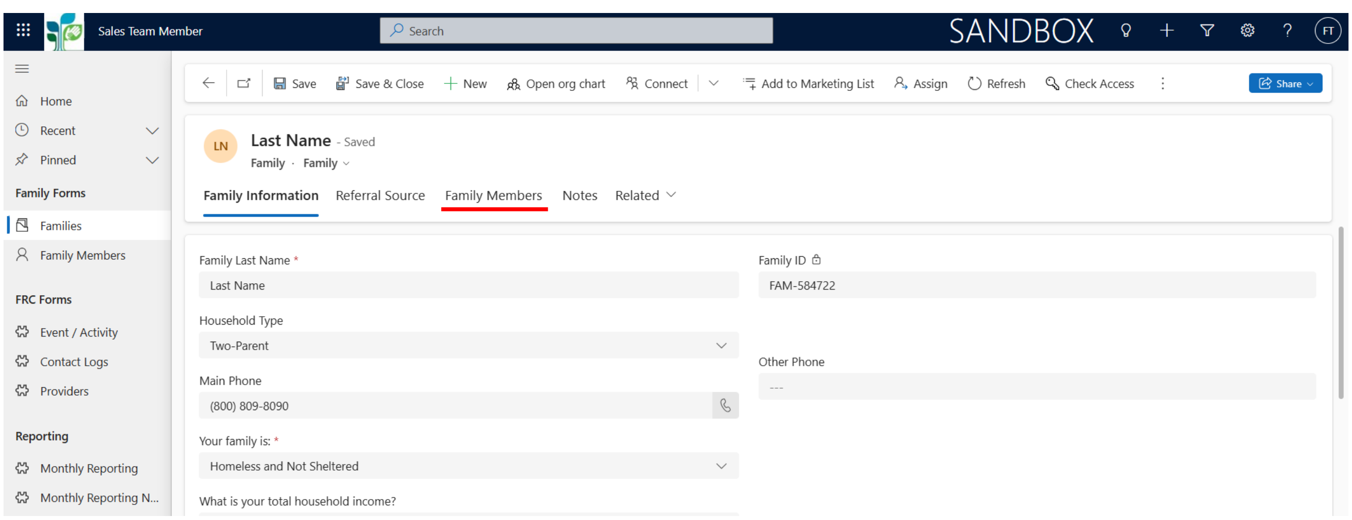
Once a family intake is completed, a family member intake, also known as **FRC Standard Form B – Family Member**, will be completed for each family member receiving direct FRC services and support.

In the FRC CRM database, a family member receiving direct FRC services must have a Family Member record. This record contains information regarding that one person, such as birthdate, screening information, and service provisions.

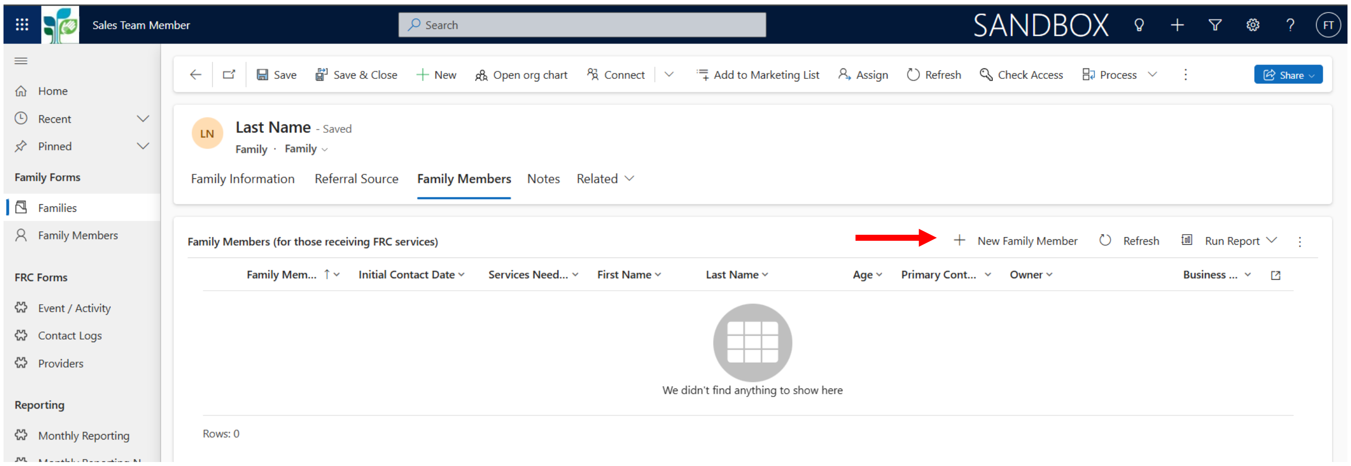
In the FRC CRM database, a family member that is not receiving direct FRC services and support may also have a Family Member record but is not required to. Although not required, doing so will provide staff with a holistic understanding of the household while also informing the FRC's Monthly Tableau Report. Each month, FRCs can see a count of '*Household members impacted by FRC programs and services*' meaning the number of family members not receiving direct services but are impacted by the FRC by living in the household with a family member receiving direct services.

To create a Family Member record for an individual receiving and not receiving direct services:

1) Navigate to the Family record the individual(s) are associated with. Select the "**Family Members**" tab.

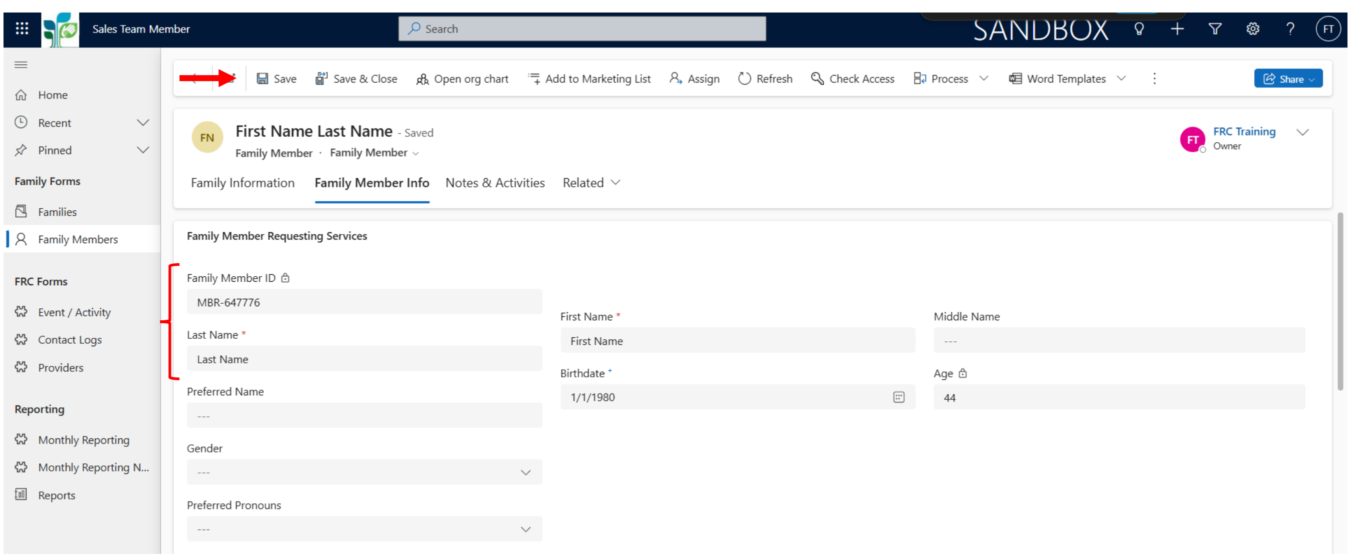


2) Select "**+ New Family Member**" located in the right corner of the "**Family Members**" box.



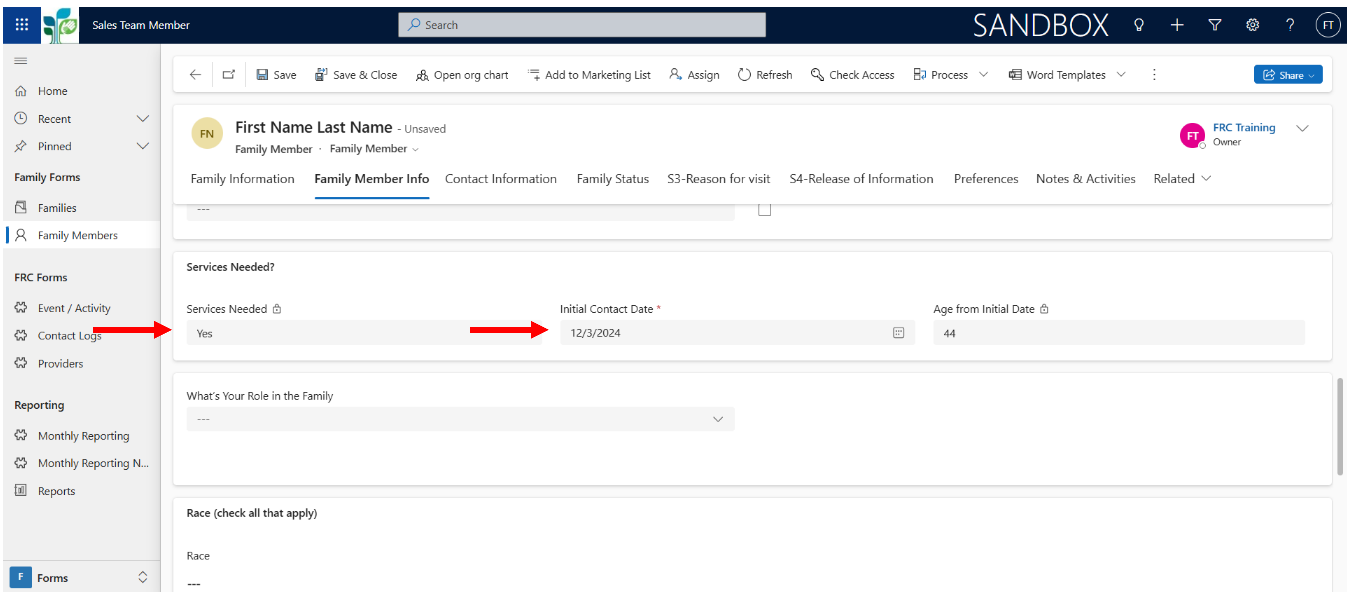
3) On the "**Family Member Info**" tab. Provide information in the required fields and select "**Save**". A Family Member ID will auto-generate in the space above the "**Last Name**". This confirms the family member record now exists in the CRM. This MBR number is connected to the main Family Record ID.

- Note the "**Birthdate**" field is not a required field but plays a key role when reporting on age groups, such as reporting on CRA/at-risk CRA youth. Please try to provide a birthdate for members completing an intake, screening, and receiving direct services. If an individual is hesitant to share this information, is also acceptable to provide an accurate birth year then indicate the month and date as January 1.



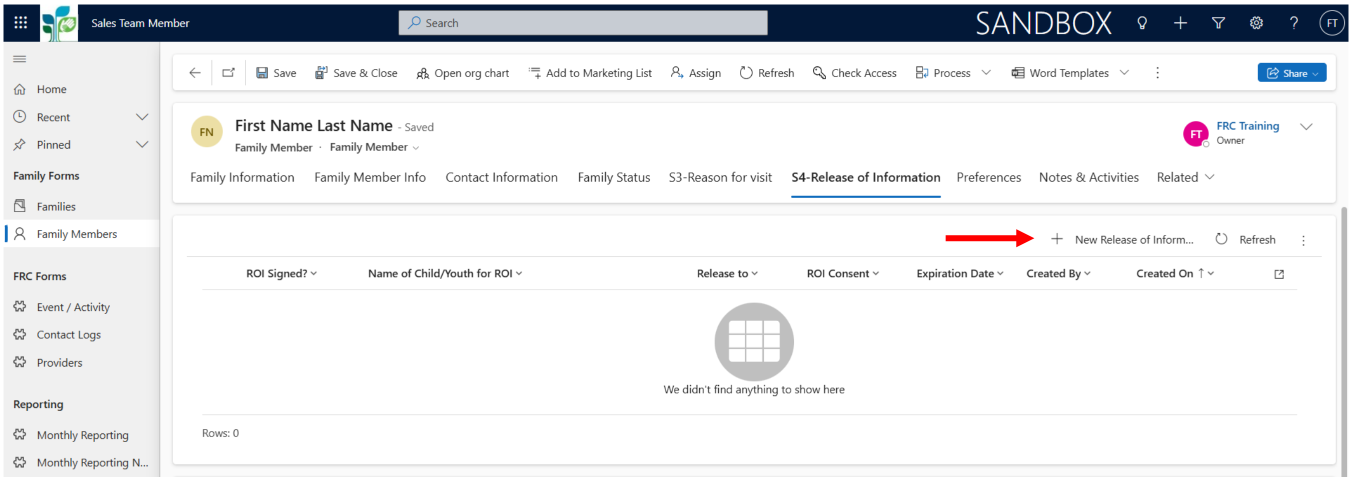
4) If entering a family member <u>not</u> receiving direct services, only enter the "Family Member Info". <u>Do not</u> proceed with the family member intake, meaning <u>do not</u> change "**Services Needed**" at the bottom of the page from '*No*' to '*Yes*'. "**Save & Close**" the record once complete.

5) To document family members directly receiving services, enter their information in the '*Family Member Info*' tab and change "**Services Needed**" to '*Yes*'. Notice additional fields and tabs appear.
   - Doing this translates to completing **FRC Standard Form B – Family Member Intake** and means this individual is engaging with the intake process, screening, and thus, service provisions. Indicate the date the intake began in the "**Initial Contact Date**" field and proceed with answering intake questions on each tab.
   - See section "Family Member Record Field Descriptions" for more information on each field.

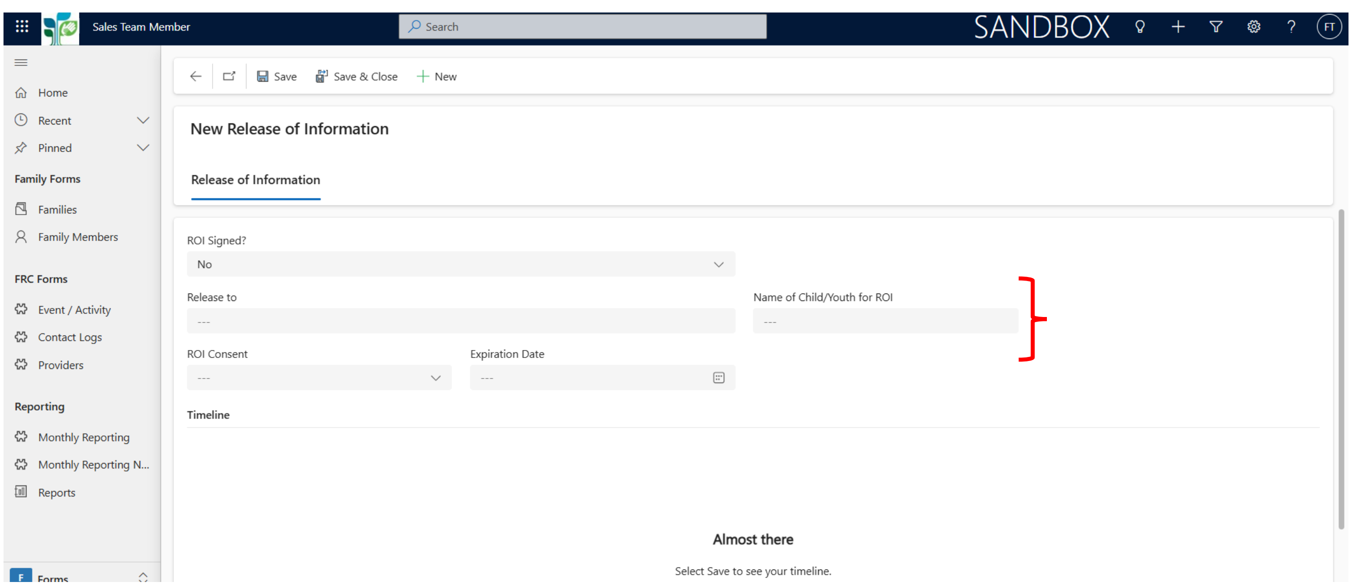


Release of Information

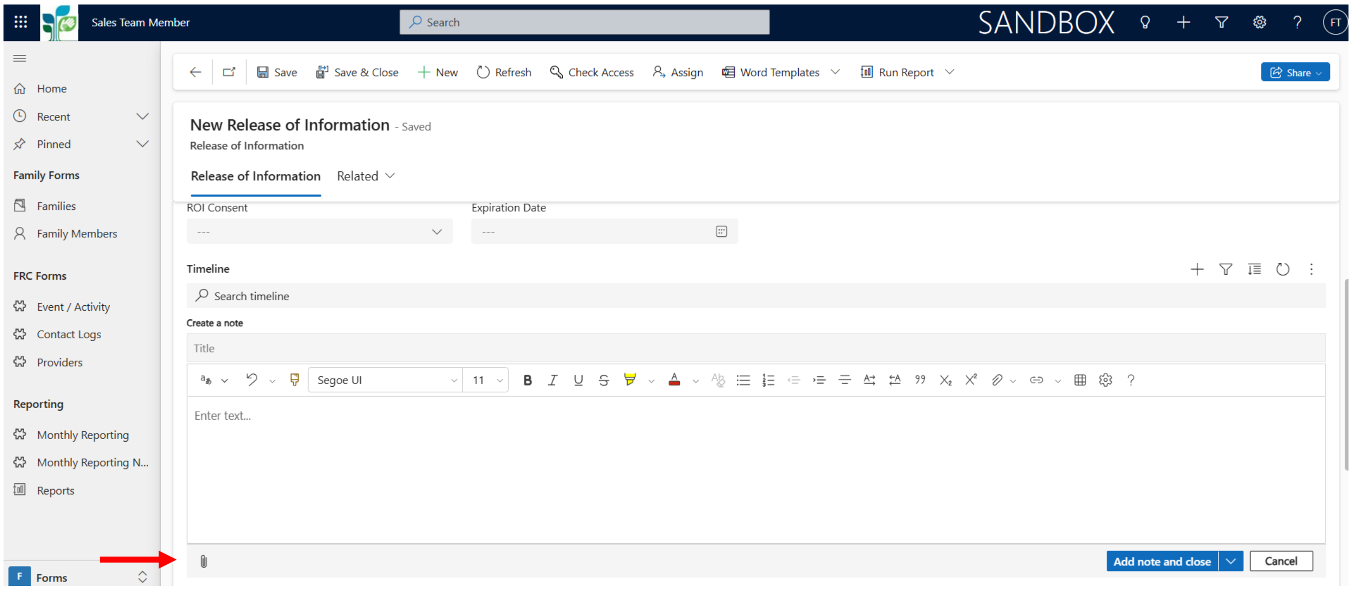
1) In section 4 of the intake, or family member record, you may add one or more release of information forms. To do add one, select **“+ New Release of Information**”.
   - Note for a child/youth’s release of information, please enter and save the information under the adult family member that signed the form or the family’s primary contact family member.



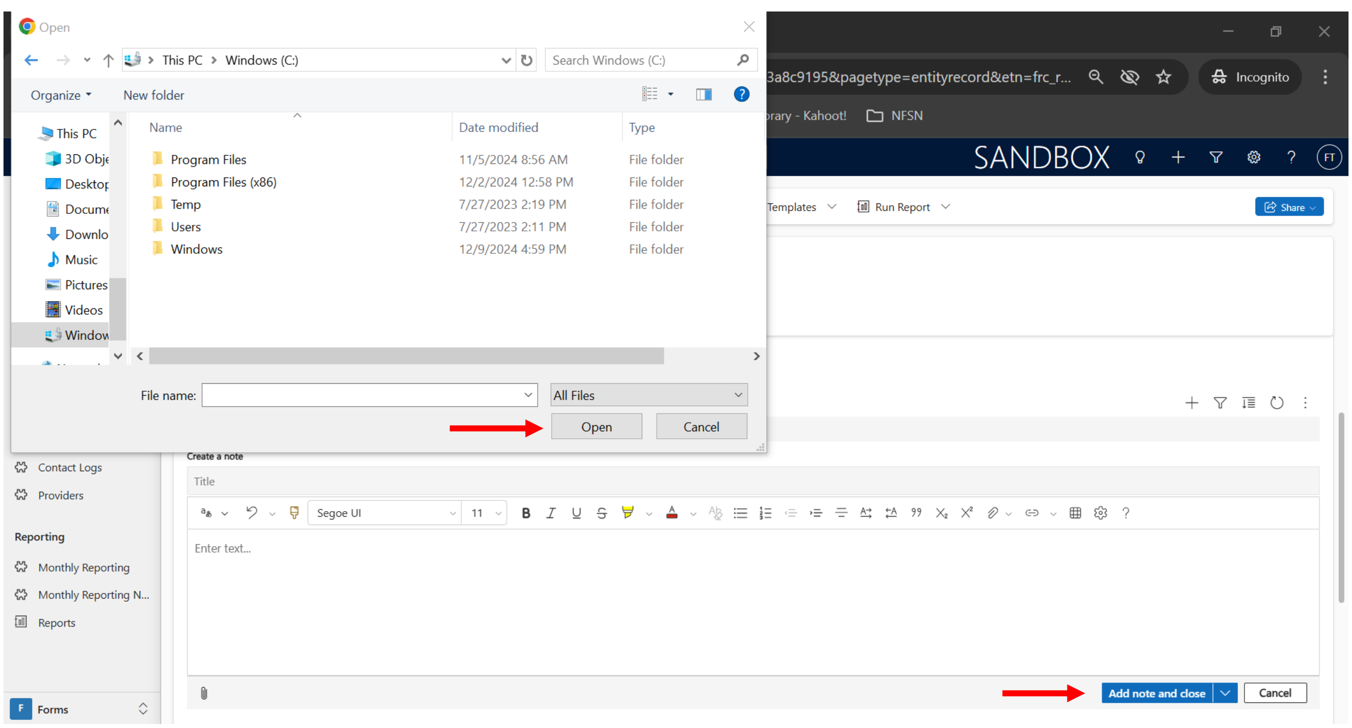
2) The “Release of Information” record will display on your screen.
   - If the form is for a child/youth, please indicate their name in the “**Name of Child/Youth for ROI**”. If the form is for an adult, you may leave this field blank.



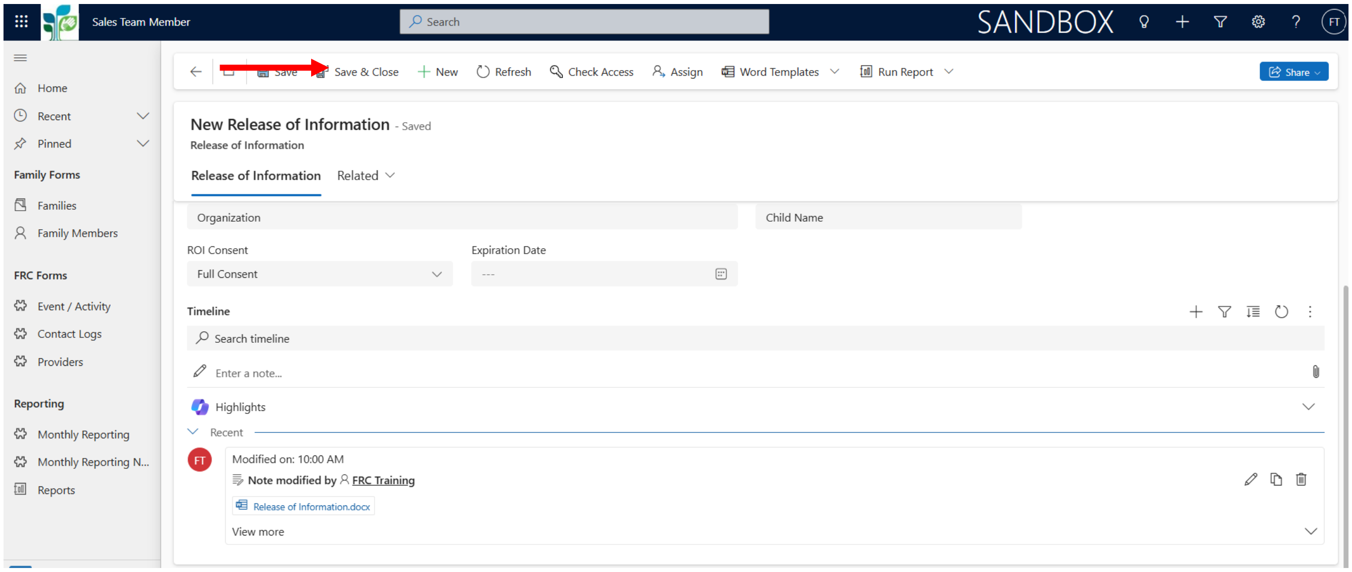
3) After entering the information in the fields, you may also upload a copy of the original Release of Information form. To do so, create a note and select the paper clip icon.



4) From your computer files, select the original release of information form and attach it to the note. Once the file is attached to the note, select "**Add note and close**".



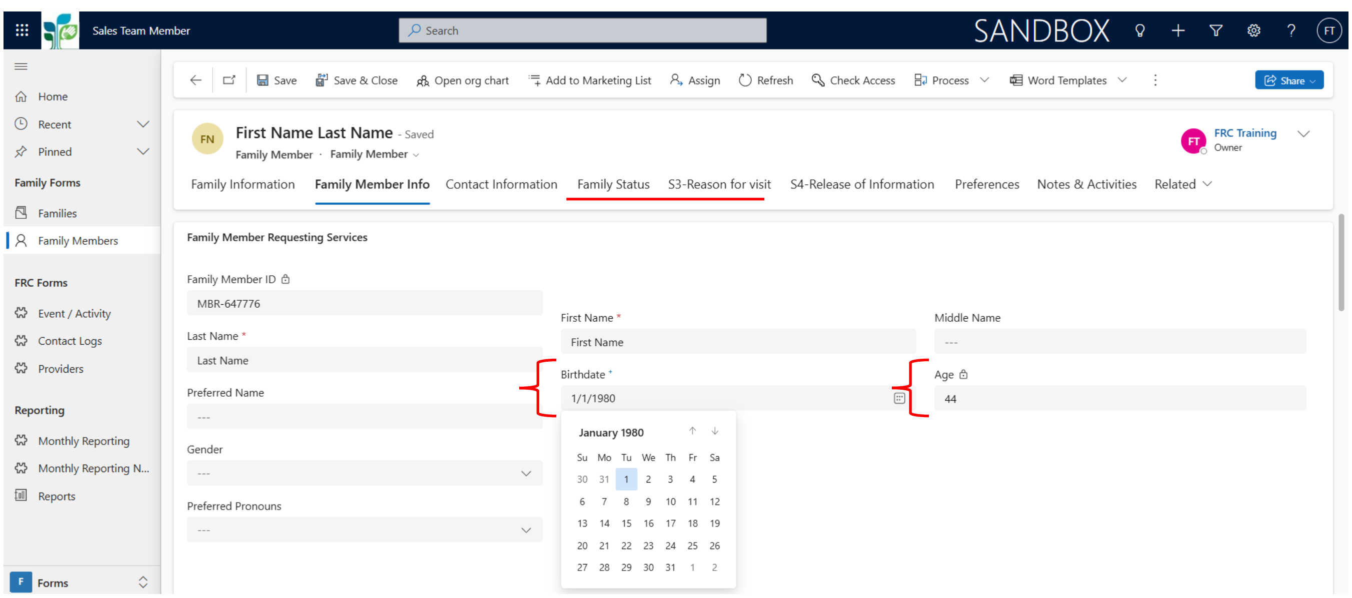
5) Once you are finished with the overall “Release of Information” record, select “**Save & Close**”.



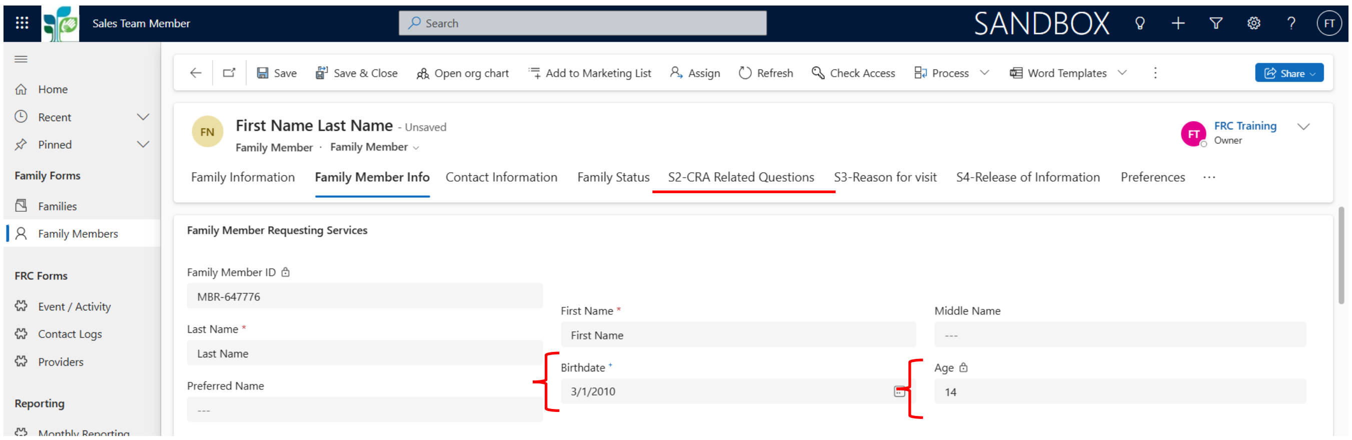
CRA Related Questions

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

1) Section 2 of family member intake, or family member record, is the “CRA Related Questions”. In the CRM, the visibility of this section is based upon the “**Birthdate**” field. If the birthdate entered produces an “**Age**” 18 or over, the “S2-CRA Related Questions” tab will <u>not</u> display.

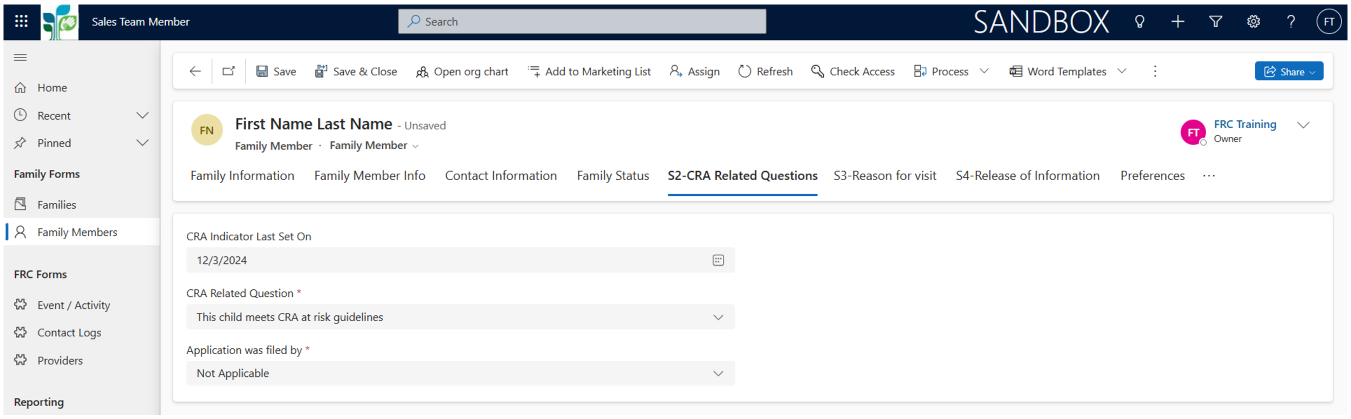


2) If the birthdate entered produces an “**Age**” 17 or under, the “S2-CRA Related Questions” tab <u>will</u> display.
    - Note the “S2-CRA Related Questions” tab will also display if no birthdate is entered, thus the member record does not have an age. Please keep in mind that for reporting CRA/at-risk CRA youth, we can only include members aged 6 to 17. This means if there are members identified as CRA/at-risk CRA, but do not have an age, they will not be included in CRA/at-risk CRA reports.



3) When prompted to answer the questions on the “**S2-CRA Related Questions**” tab. Appropriately indicate in the “**CRA Related Question**” if the child/youth is a CRA, at-risk CRA, or the section is “Not Applicable”.
    - If “A CRA Application has been filed for this child” is selected, notice today’s date automatically fills into the “**CRA Indicator Last Set On**” field. Then, for the “**Application was filed by**” field, make sure to indicate the entity or person that filed the CRA application.
    - If “The child meets CRA at-risk guidelines” is selected, notice today’s date automatically fills into the “**CRA Indicator Last Set On**” field. Then, for the “**Application was filed by**” field, make sure to select “Not Applicable” because an application has not been filed.
    - If “Not Applicable (not a CRA and not at risk)” is selected, notice *no* date fills into the “**CRA Indicator Last Set On**” field. Then, for the “**Application was filed by**” field, make sure to select “Not Applicable” because overall this section is not applicable to the child/youth.

NOTE: For the FRC Admin Support, Family Support Worker, School Liaison, and Family Partner the "**CRA Indicator Last Set On**" field is not editable and the "**CRA Related Question**" as well as "**Application was filed by**" fields lock after initially being answered during the intake. For the FRC Clinician, Program Manager, and Program Director, all fields on the "**S2-CRA Related Questions**" are always editable. These permissions are in place because during the initial intake process, FRC staff must understand if this child/youth and family should be connected to the FRC clinician due to being a CRA/at-risk CRA. From there, it is the responsibility of the FRC Clinician, as well FRC Program Director and Manager, to ensure proper and accurate documentation of CRA/at-risk CRA youth information.



Family Member Record Field Definitions

1) <u>(Locked) Family Member ID</u>: Once the family member record is saved in the CRM database, a unique identification number is automatically assigned.
2) <u>Last Name*, First Name*, Middle Name</u>: The family member's name.
3) <u>Preferred Name</u>: If applicable, the name the family member likes to be called or a nickname.
4) <u>Birthdate^{+}</u>: The family member's birthday. If an individual is hesitant to share this information, is also acceptable to provide an accurate birth year then indicate the month and date as January 1.
5) <u>(Locked) Age</u>: Once a birthdate is entered, an age is automatically generated and will automatically update as time goes on.
6) <u>Gender</u>: Have the family member identify their gender. Utilize 'Other' if you need a write-in field.
7) <u>Preferred Pronouns</u>: Have the family member identify their preferred pronouns. Utilize 'Other' if you need a write-in field.
8) <u>Do you have health insurance?*</u>: Indicate if this specific family member currently has health insurance.

9) Do Not Contact: Related to the contact information fields; phone and email address. Check and save this box if you need to notify any staff member accessing this family member's account to not contact the member via phone or email. This field is mostly used due to safety concerns.
10) Services Needed: Indicating 'Yes' services are needed means this family member is completing a full FRC intake, including a screening, to then receive direct FRC services and/or an external provider referral. Leave this field as 'No' if the person will not be receiving direct FRC services or an external provider referral.

The remaining fields are only accessible if #10 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.

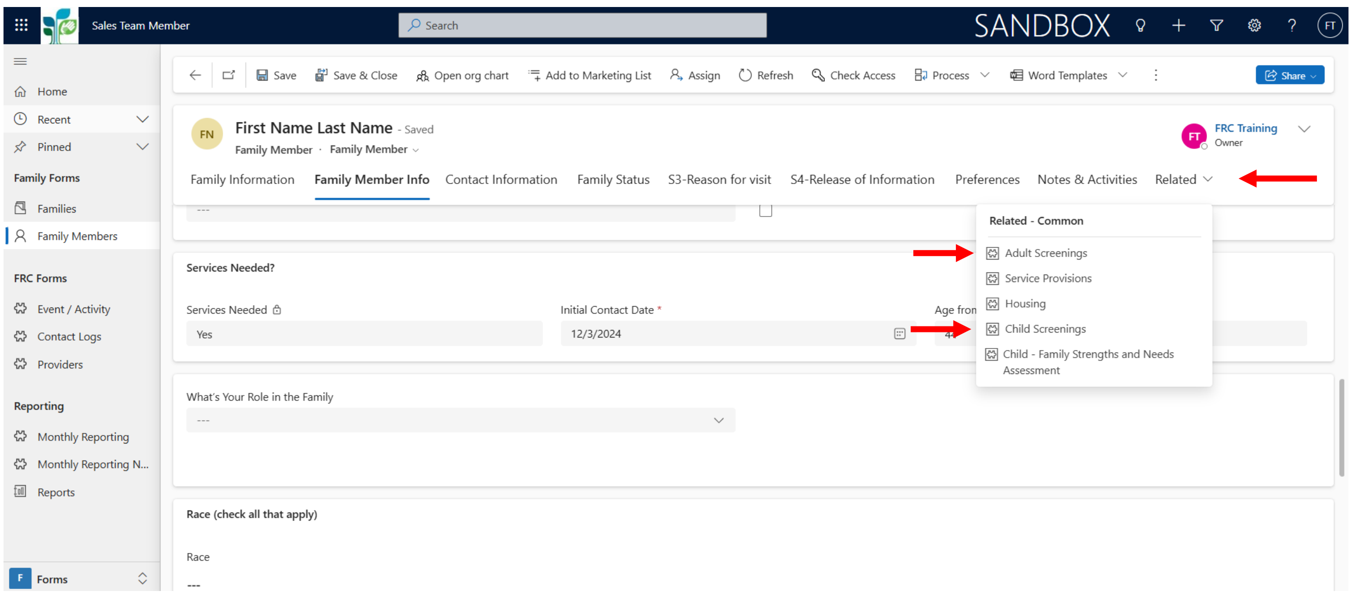
11) Initial Contact Date*: The first date the family member began the family member intake.
12) (Locked) Age from Initial Date: An automatically generated age meaning the age the family member was when they began the family member intake.
13) What's Your Role in the Family: Allow the family member to identify their role in the family from the drop-down list.
14) Race & Ethnicity: Allow the family member to identify their race and ethnicity.
15) Primary Language: Indicate the main language the family member communicates with. Utilize 'Other' if you need a write-in field.
16) (Military) Service: Indicate if the family member's relationship to serving in the military.
17) 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'.
18) 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.
19) Family Member Status & Marital Status: Allow the family member to identify their information.
20) CRA Related Questions: See this guide's "CRA Related Questions" section for more information.
21) 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.
22) Release of Information tab: See this guide's "Release of Information" section for more information.
23) Preferences tab: Optional information to collect and enter related to the family member's contact preferences and FRC status.

E. Adult and Child Screenings – Finalizing the Intake Process

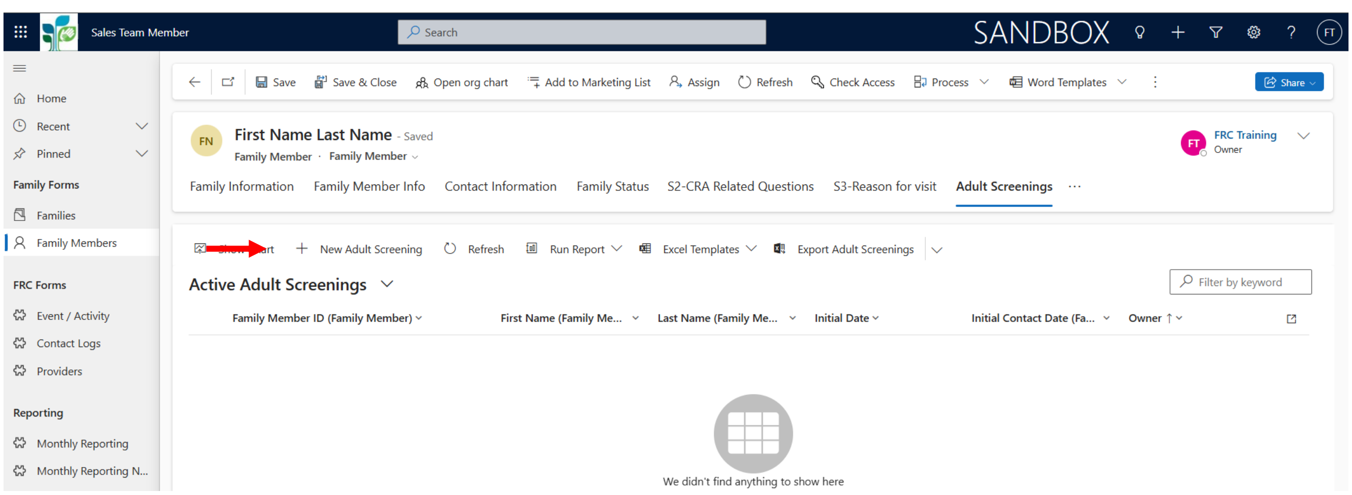
After completing the Family Member intake for an individual receiving direct FRC services and support, a screening must be completed. For intaked members 18 and over, complete an Adult Screening, also known as **FRC Standard Form C^1 – Adult Screening Information**. For intaked members 17 and under, complete a Child Screening, also known as **FRC Standard Form C^2 – Child Screening Information**.

Gather as much information in the screening and as close to the intake date, or “**Initial Contact Date**”, as possible. Providing a screening to members receiving direct services as well as the number of days between the “**Initial Contact Date**” and screening date are important to be mindful of and enter accurately. These data points are reported to FRC Site Management through the FRC’s Adult and Child Screening Benchmarks in Tableau.

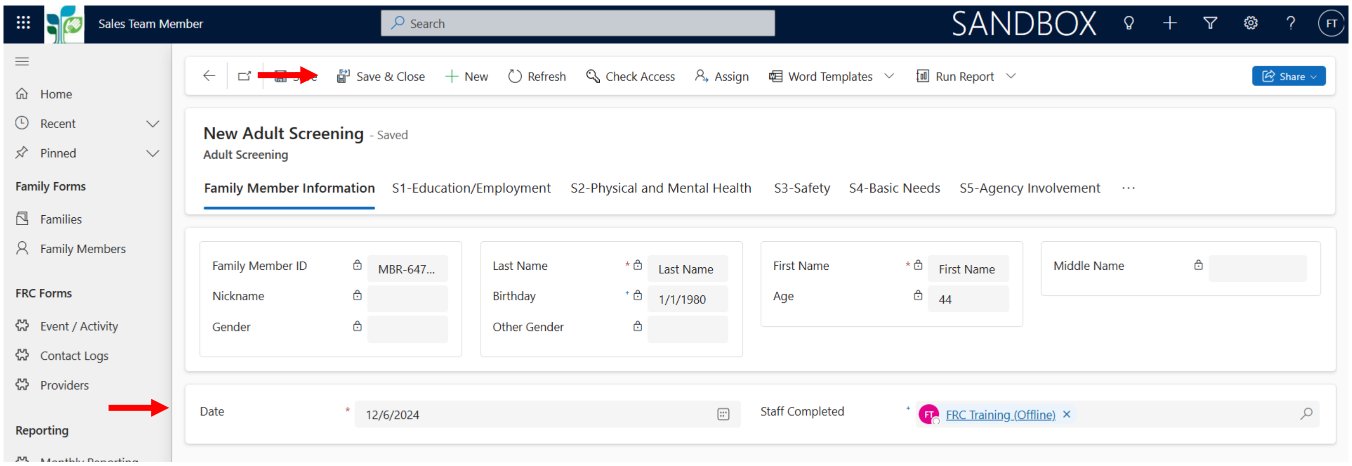
1) In the already intaked Family Member’s record, select “**Related**” (or the 3 dots) on the far right of the tabs and select the appropriate screening (i.e., select “**Child Screening**” for a member 17 and under, select “**Adult Screening**” for a member 18 and over).



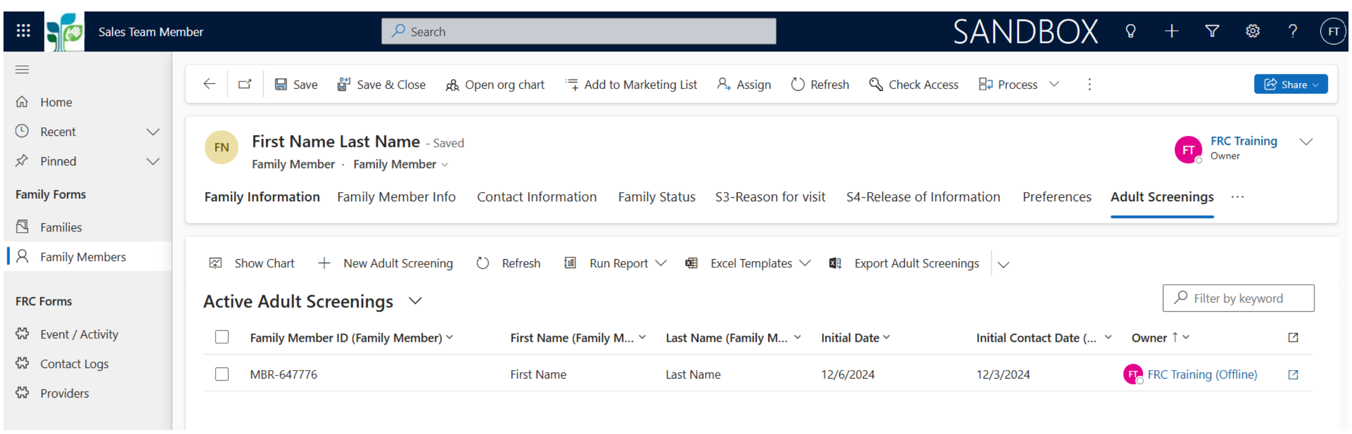
2) To create a screening, select “**+ New Adult Screening**” or “**+ New Child Screening**” depending on which you are looking to enter.



3) The only required field is the "**Date**". However, please enter as much information as you have into the respective tabs. Once finished, select "**Save & Close**".
   - Note the relationship with the family member is the priority. In the instance a member is not willing to provide all the screening information during the first or second time you meet with them, it is acceptable to create the screening record without having all the fields answered. As you work with the member more, you may add the missing information obtained into the existing screening record.



4) After saving the screening, you will see the record on the screening homepage. This screening is a 'living' document and may be updated as the member's information changes.
   - It is appropriate to create a new screening record, for both adults and children respectively, if your FRC has not worked with this member in at least 1 year.



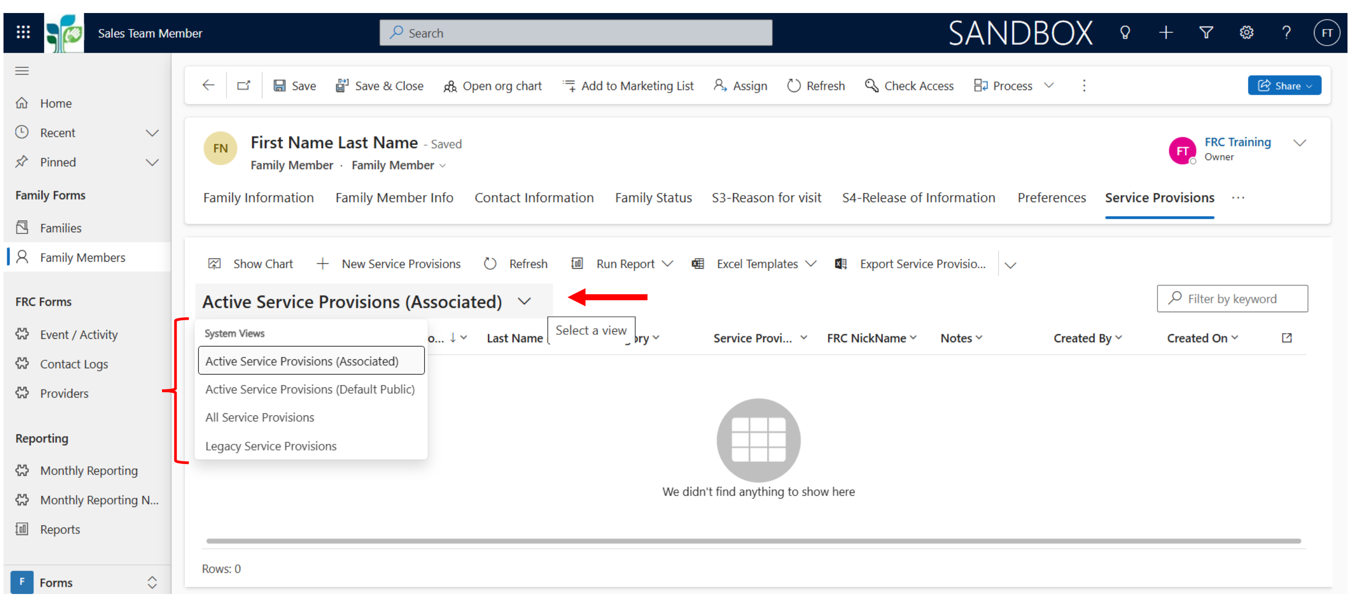
F. Service Provisions

During and after the intake process, the FRC will collaboratively work with the family/members to identify the appropriate referrals to another community organization and/or direct services the FRC may provide. Each instance of an external provider referral and direct FRC service given will be a service provision record, also known as **FRC Standard Form D – Service Provision**. Then, each time there is reengagement in the same service or referral, the service provision record, or **FRC Standard Form D – Service Provision**, will be updated with an additional service date.

In the instance of an external provider referral, the CRM's Providers section becomes accessible within a service provision record to appropriately note the provider the family member was referred to. This translates to the use of **FRC Standard Form D[1] – Provider Referral**.

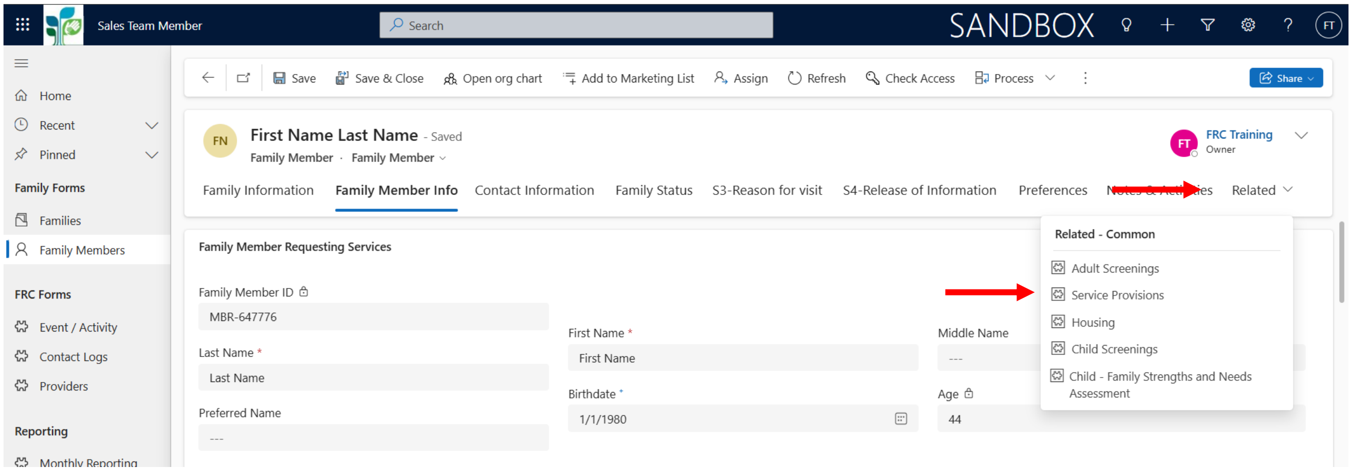
In a Family Member's service provision section, there are 3 different views to see the individual's service provisions. Select the menu title, "Active Service Provisions (Associated)", to see the different view options.

- "**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.

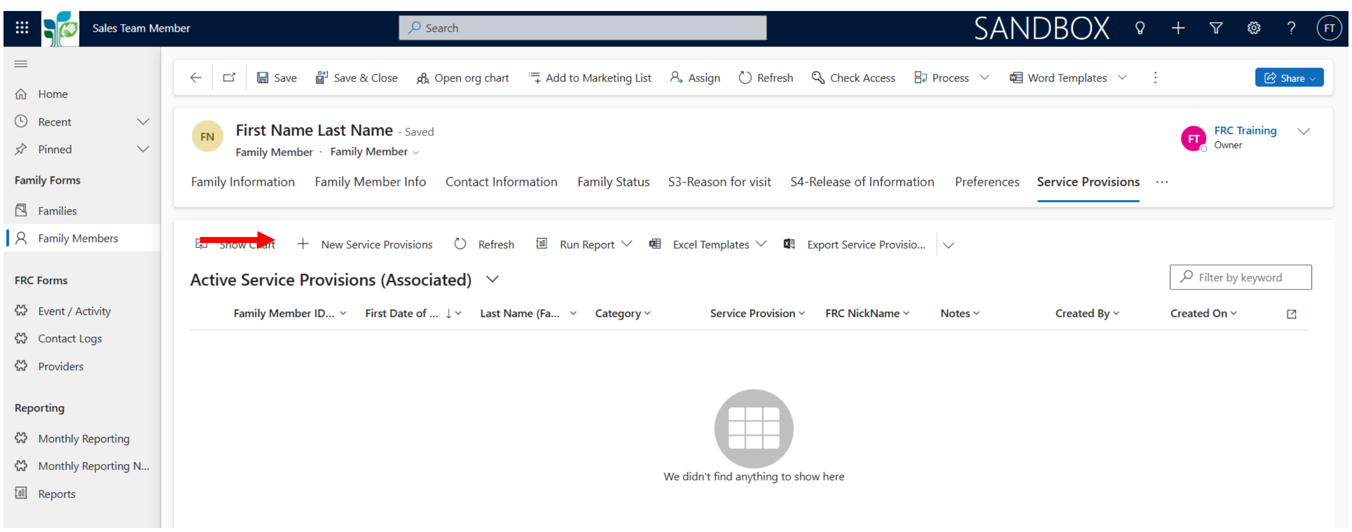


To add a service provision to a family member record:

1) Locate the family member record and on the navigation bar, select the "**Related**" tab (or 3 dots) at the end. Then, select "**Service Provisions**".



2) The CRM defaults to the "Active Service Provisions (Associated)" view. Select "**+New Service Provisions**".

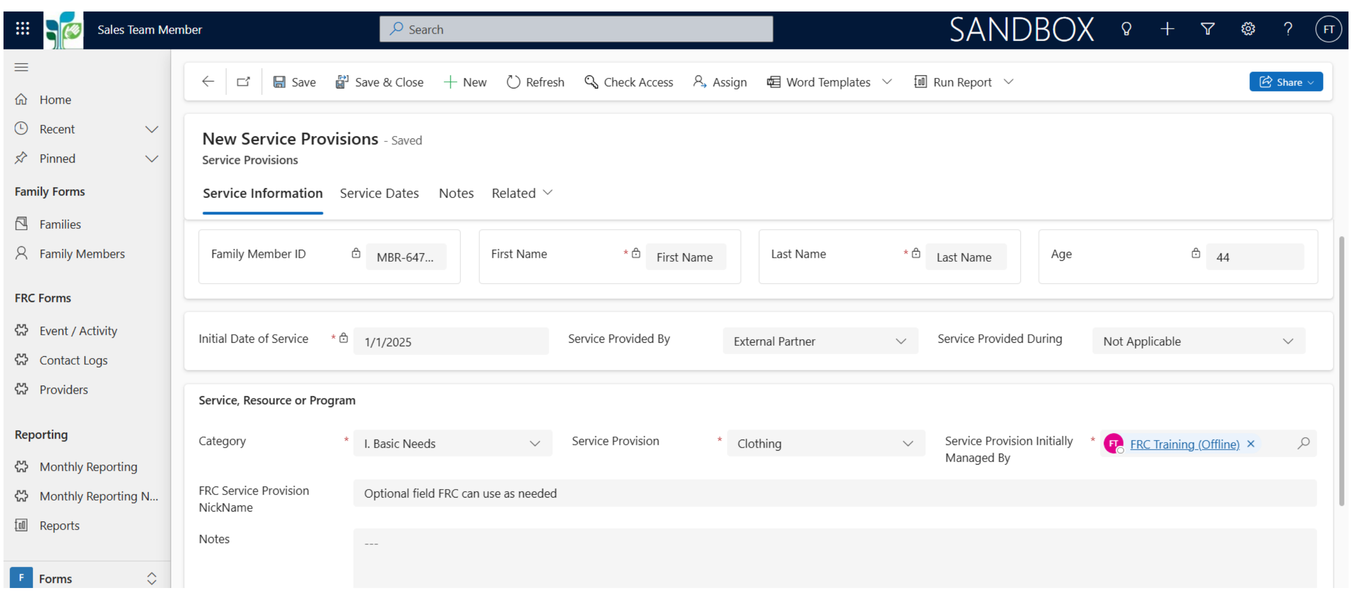


3) On the “Service Information” tab, enter:

- The “**Initial Date of Service**”. This is the first date the member engaged with the service, resource, or program. Note this field will lock after saving the record.
- Indicate the “**Service Provided By**”, meaning 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.
- In the instance this service is related to an emergency or unforeseen consequential event, indicate the appropriate information in the “**Service Provided During**” field. If it is unrelated, select “Not Applicable” from the drop-down list.
- Next, 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.

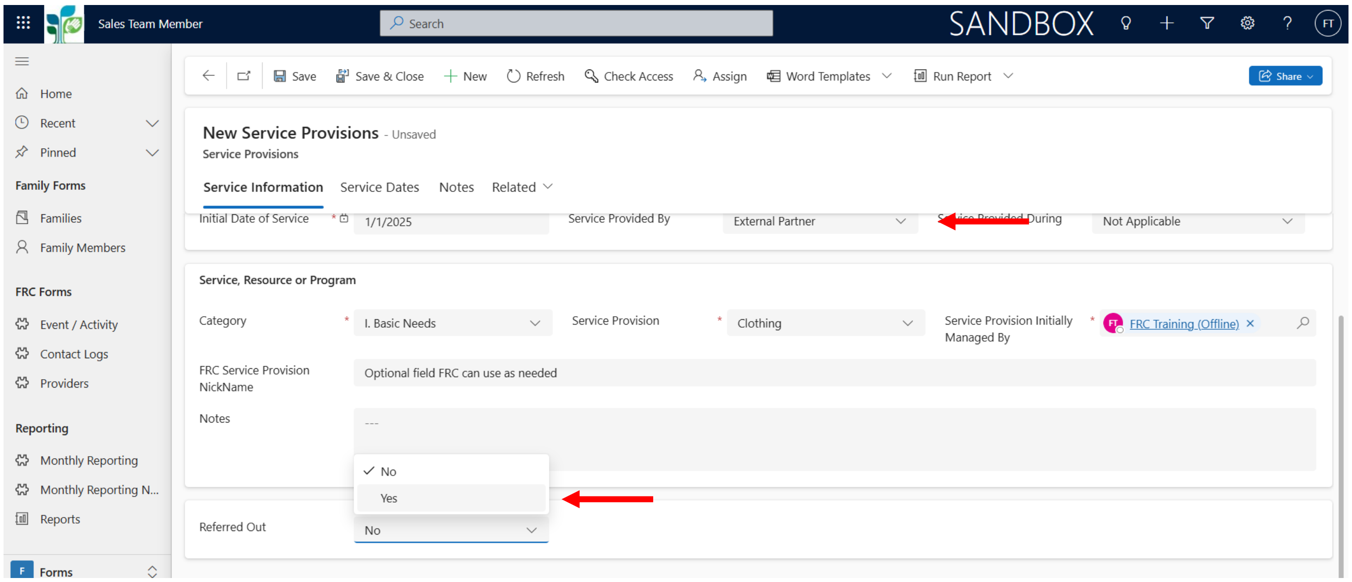
- Then search the “**Service Provision Initially Managed By**” field for the appropriate staff person managing the direct service or giving the external provider referral.
- As needed, utilize the “**FRC Service Provision Nickname**” space to further identify the service, resource, or program. For example, specifying “Youth LGBTQ+ Group” and “Adult LGBTQ+ Group” if your FRC provides both groups.
- Once complete, select “**Save**”.



Giving a Provider Referral

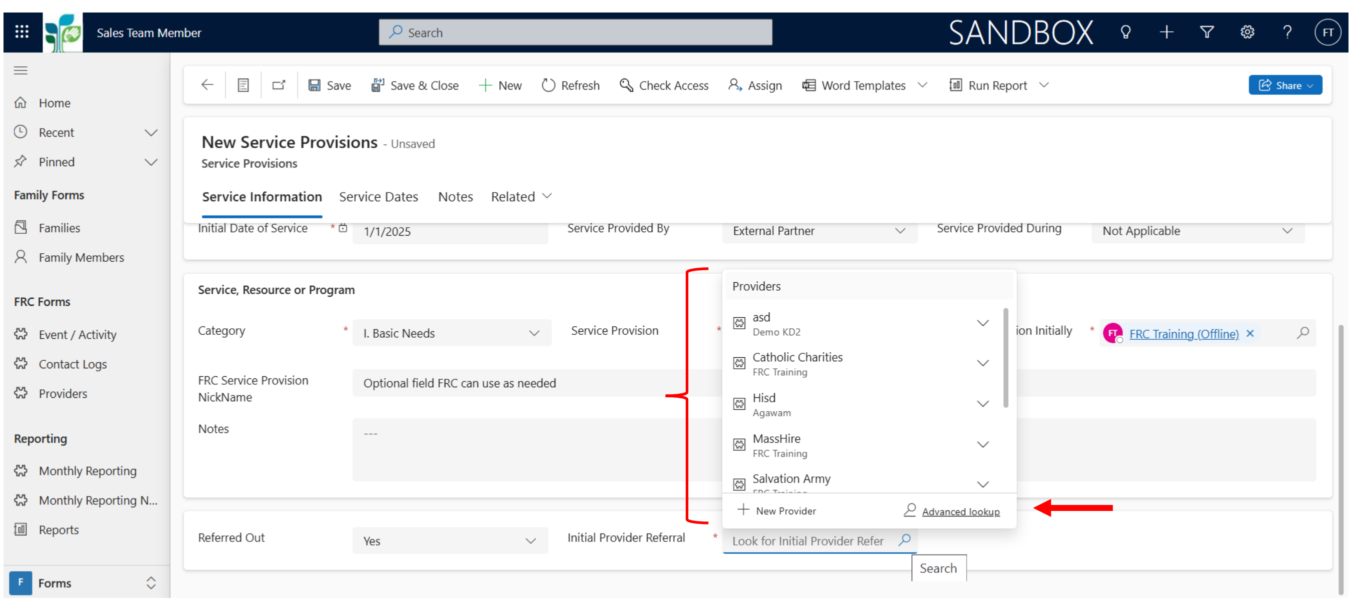
In the instance the service provision record is for an external provider referral:

1) First, ensure “**External Partner**” is selected in “**Service Provided By**”. Then, change “**Referred Out**” from ‘No’ to ‘Yes’.

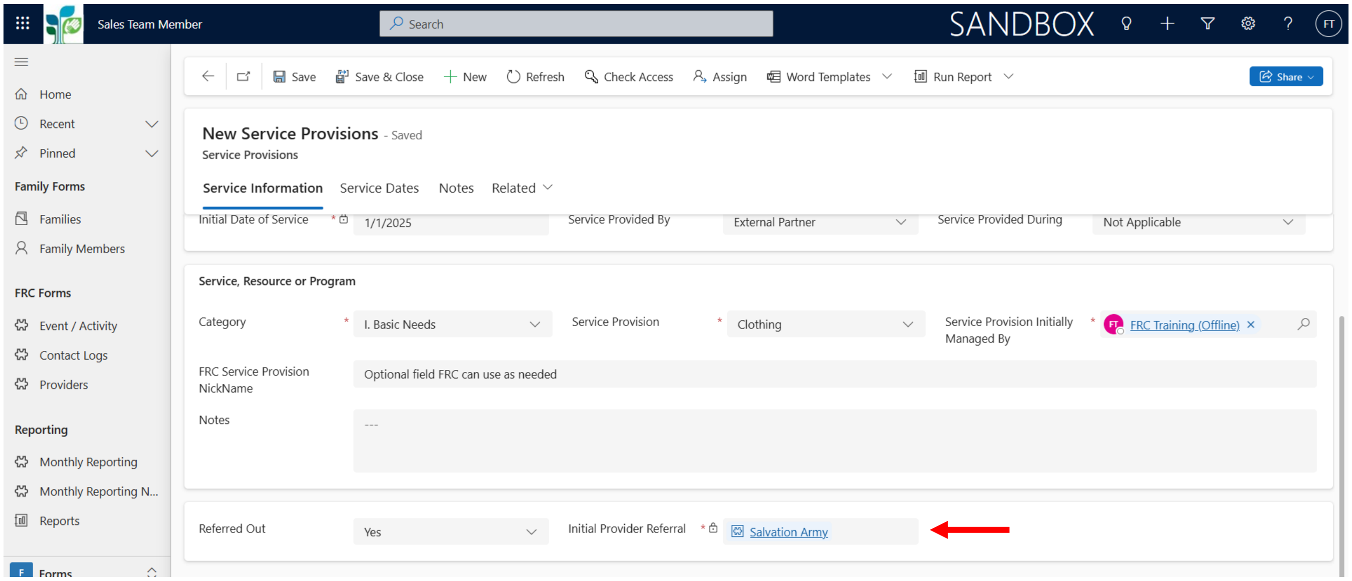


2) The “**Initial Provider Referral**” field will appear. Begin typing the provider record’s name in the box or select the magnifying glass to see a brief list of providers.
   - To see a large list of providers, select “**Advanced lookup**”.

NOTE: Please only create provider records in CRM’s the Providers section. See Section J of this guide for further information.

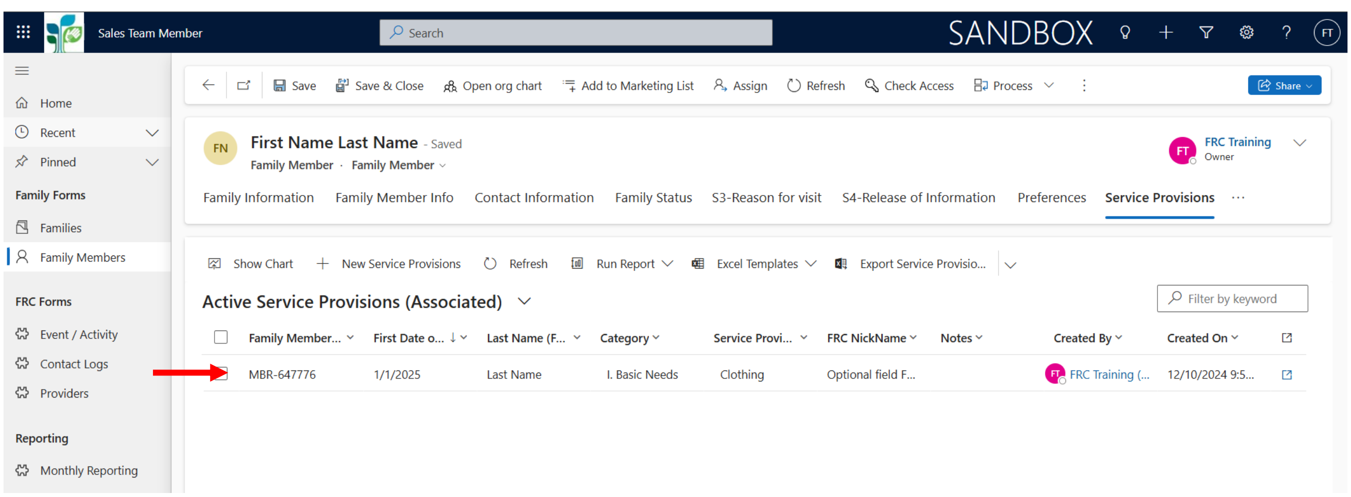


3) Upon selecting the provider and saving the overall service provision record, the "**Initial Provider Referral**" field will lock.

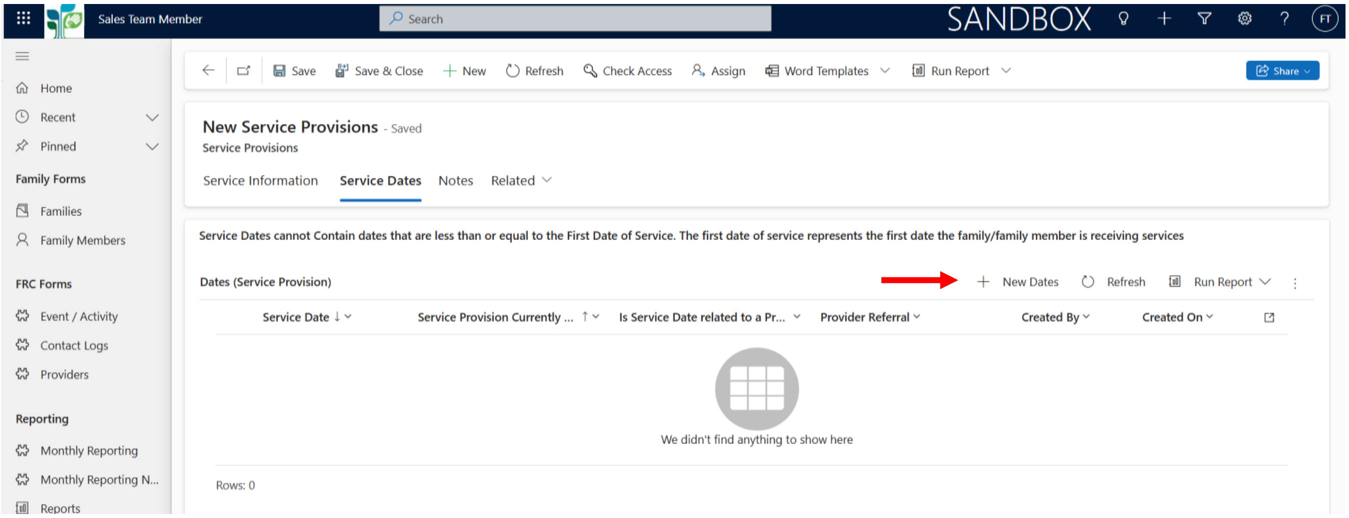


Adding Service Dates to a Service Provision

1) In the instance a family member returns and receives a service provision that exactly matches the details of a service provision already in their account, <u>do not create a new service provision record</u>. Instead, select the existing service provision record to add an additional subsequent service date.

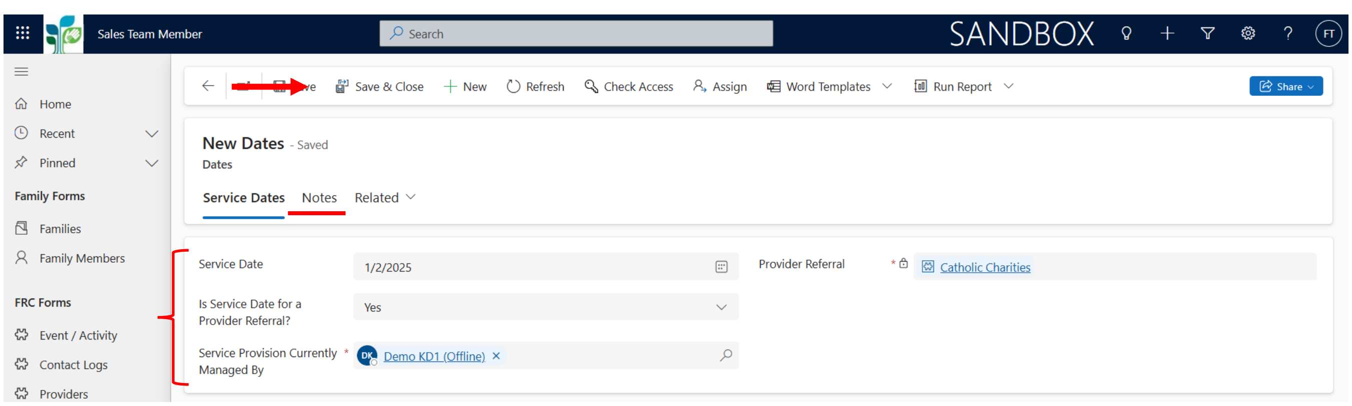


2) Within the existing service provision record, navigate to the “**Service Dates**” tab and select “**+ New Dates**”. Each additional subsequent service date beyond the “Initial Date of Service” a family member engages in will be documented here.

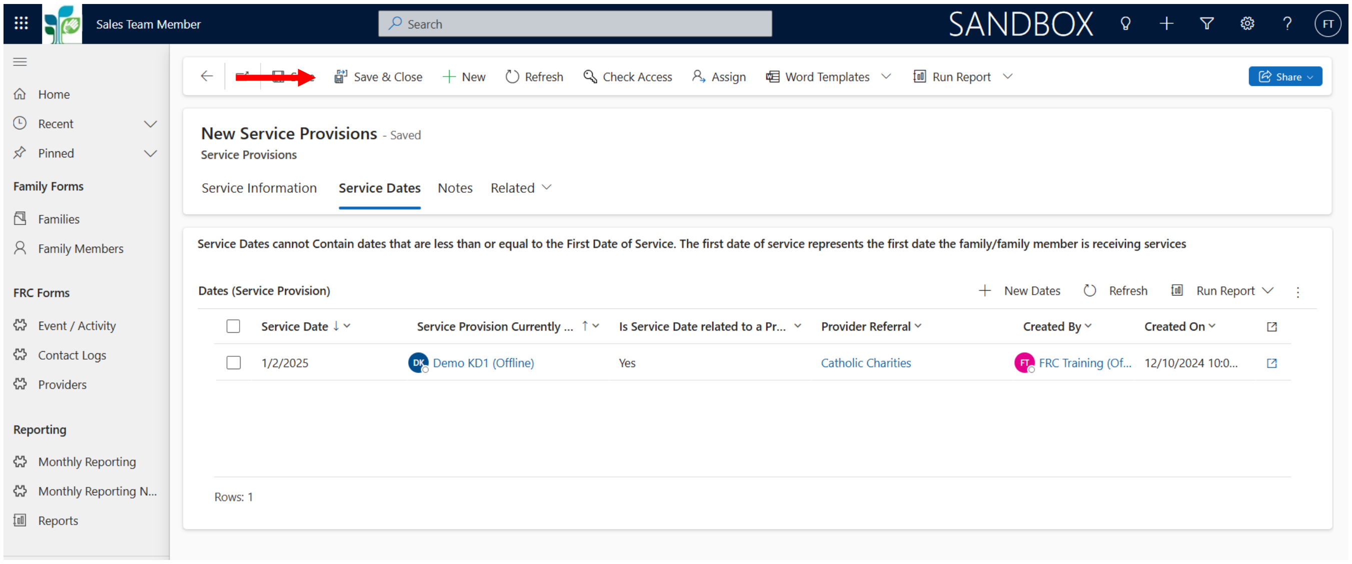


3) In the Service Date record, enter:

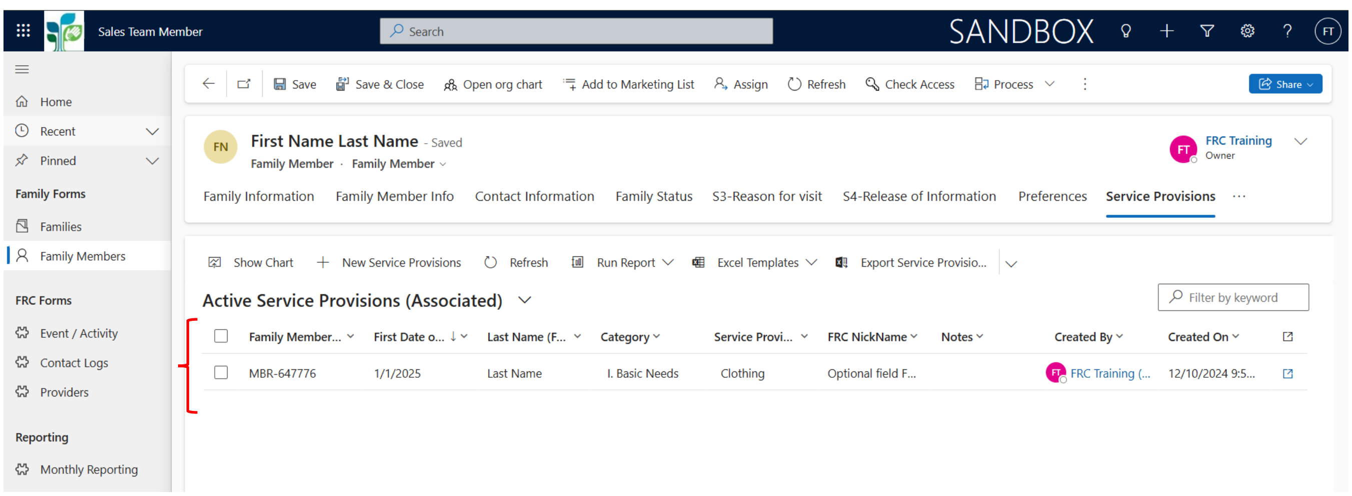
- The “**Service Date**”. Again, Services Dates are dates beyond the Initial or First Date of Service. Service Dates should not match or be a date prior to the Initial or First Date of Service.
- Then, search the “**Service Provision Currently Managed By**” field for the appropriate staff person managing the direct service or giving an external provider referral.
- If the Service Date is for an external provider referral, change “**Is Service Date for a Provider Referral?**” from ‘No’ to ‘Yes’.
  - If this is done, a “**Provider Referral**” field will appear. Search and select the provider from the list.
- If needed, see the “Notes” tab to document notes related to the service date.
- Once complete, select “**Save & Close**”.



4) All service dates related to the overall service provision will be seen in the “Dates” list. Once complete, select “**Save & Close**” on the service provision record.



5) The saved service provision and service date will be displayed on the “Active Service Provisions (Associated)” page.

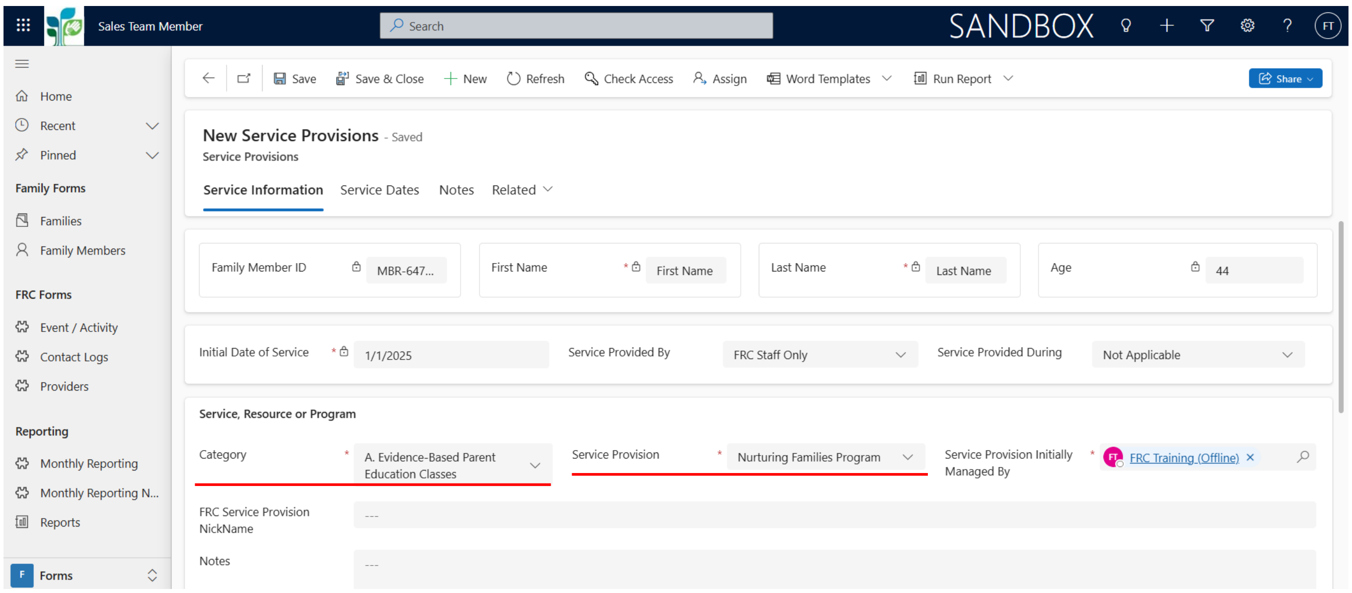


EVB Parenting Education Classes – AAPI Indicators

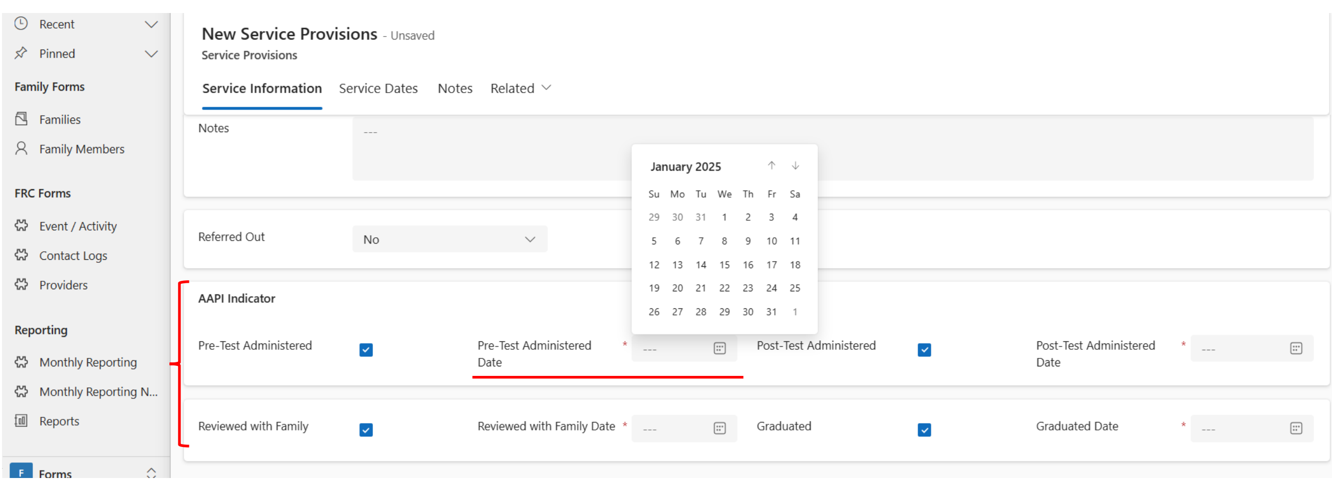
If the service provision is for an Evidence-Based Parenting Education Class, the Adult Adolescent Parenting Inventory (AAPI) fields will appear. Please consult with your FRC Site Management for further information and guidance on when and how to use the AAPI.

To use the AAPI indicators in the FRC CRM:

1) Enter the service information such as, the “**Initial Date of Service**”, “**Service Provided By**”, “**Service Provided During**”, and “**Service Provision Initial Managed By**” fields.
    - Next, select the “**Category**” ‘Evidence-Based Parent Education Classes’, then select a class from the “**Service Provision**” drop-down menu.



2) Notice the “AAPI Indicators” appear at the bottom of the “Service Information” tab when “**Category**” ‘Evidence-Based Parent Education Classes’ is selected. Each time an indicator is completed, check the appropriate box and a date field will appear. Enter the date the action or form was completed.



G. 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 document **FRC Standard Form J – Family Strengths and Needs Assessment**, or a declined FSNA service provision, in the CRM database:

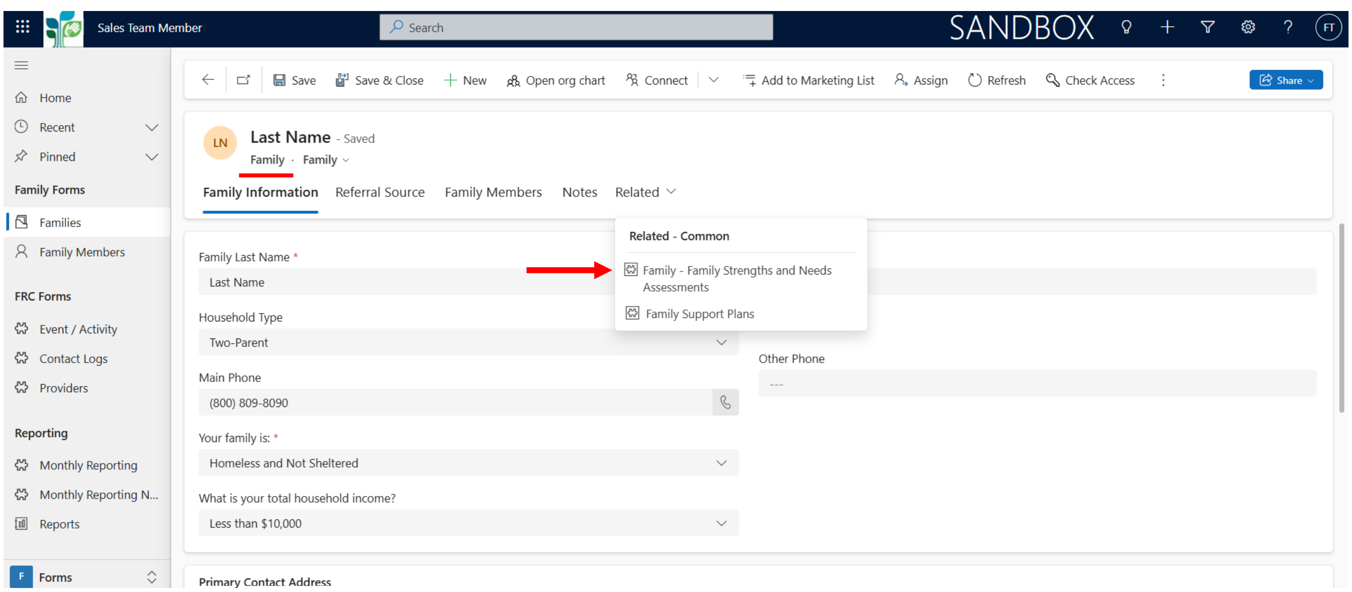
First, ensure the child's family member record correctly indicates the child's status under the "S2-CRA Related Questions" tab. For further information and guidance on documenting a family member's CRA information, see "CRA Related Questions".

Next, the Family portion and/or Child portion of the Family Strengths and Needs Assessment (FSNA) may be entered in the CRM. However, if the FSNA is verbally declined or the family repeatedly does not show to the scheduled assessment, a 'Declined Family Strengths and Needs Assessment (FSNA)' service provision may be entered into the identified CRA/at-risk youth's family member account.

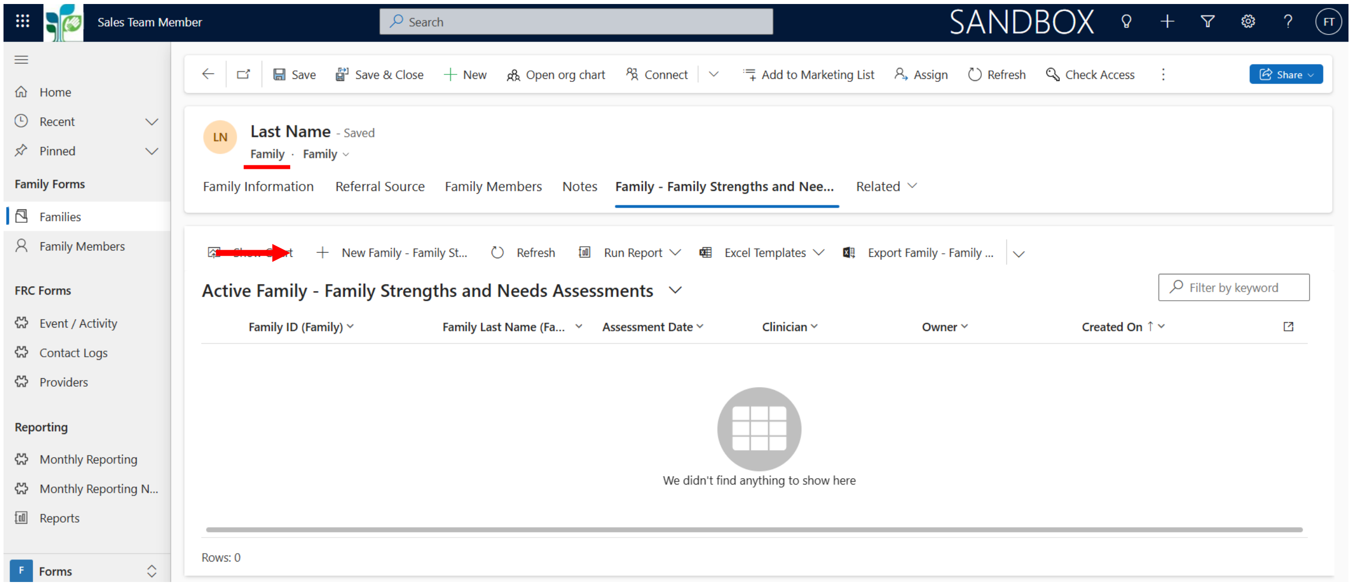
See the appropriate section below for data entry guidance.

Entering the Family Portion of the FSNA

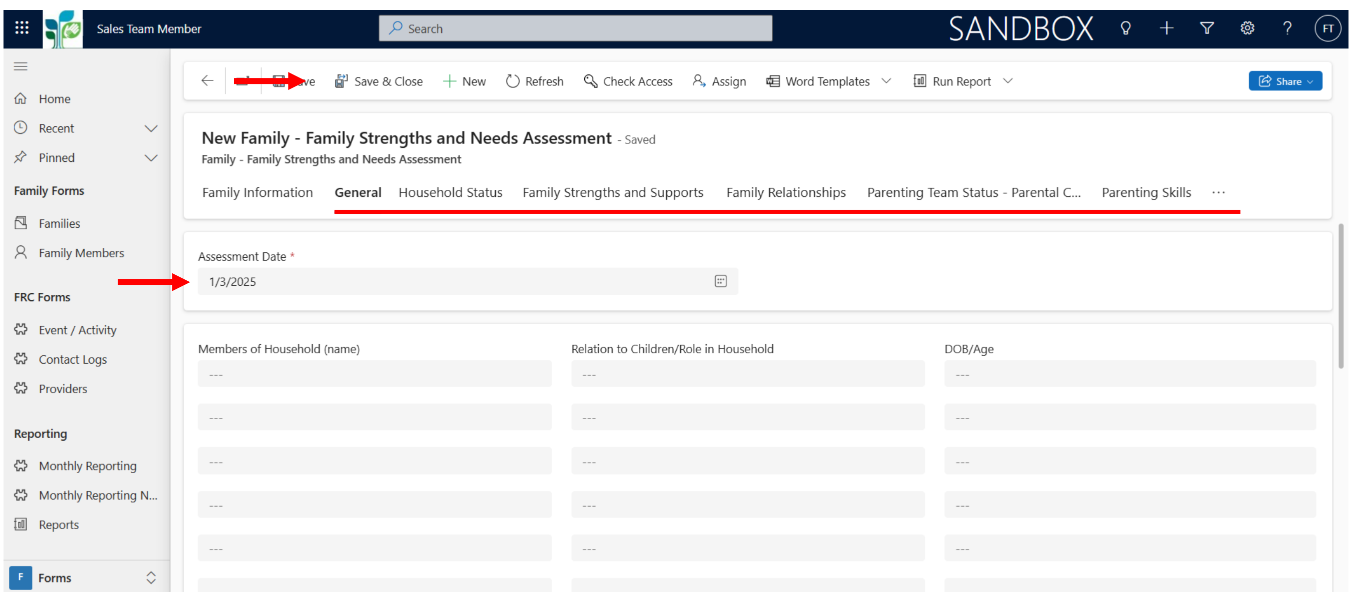
1) In the Family's record, select the "**Related**" tab (or 3 dots). Then, select "**Family – Family Strengths and Needs Assessments**".



2) To enter this portion of the assessment, select "**+ New Family – Family Strengths and Needs Assessment**".

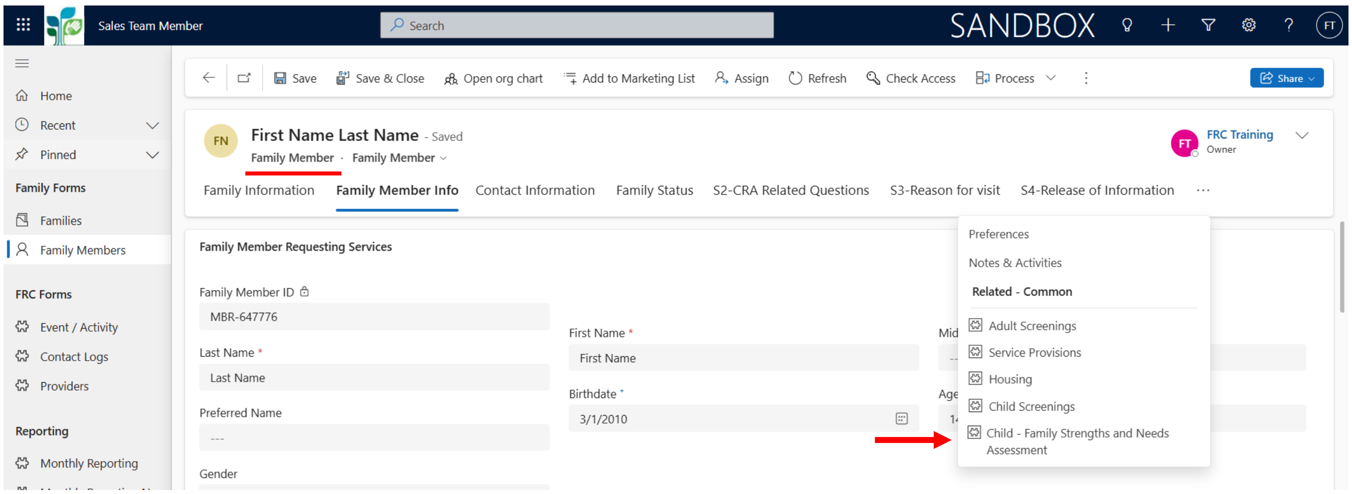


3) Enter the "**Assessment Date**" and all other assessment information. Once complete, select "**Save & Close**".

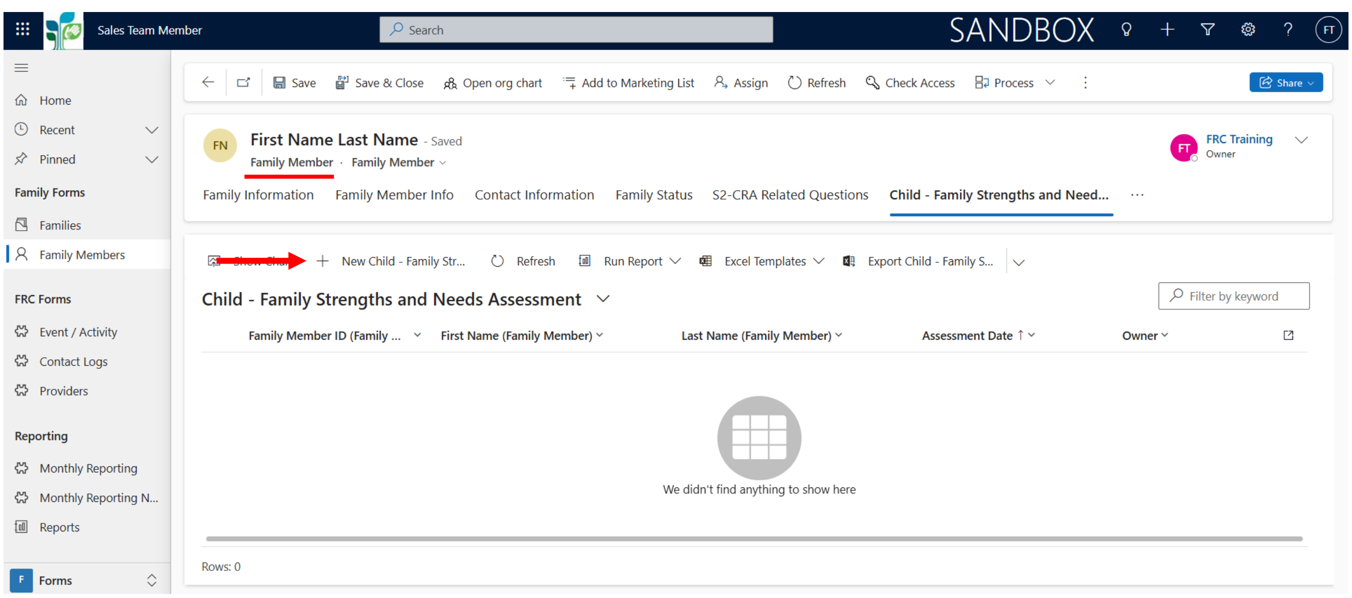


Entering the Child Portion of the FSNA

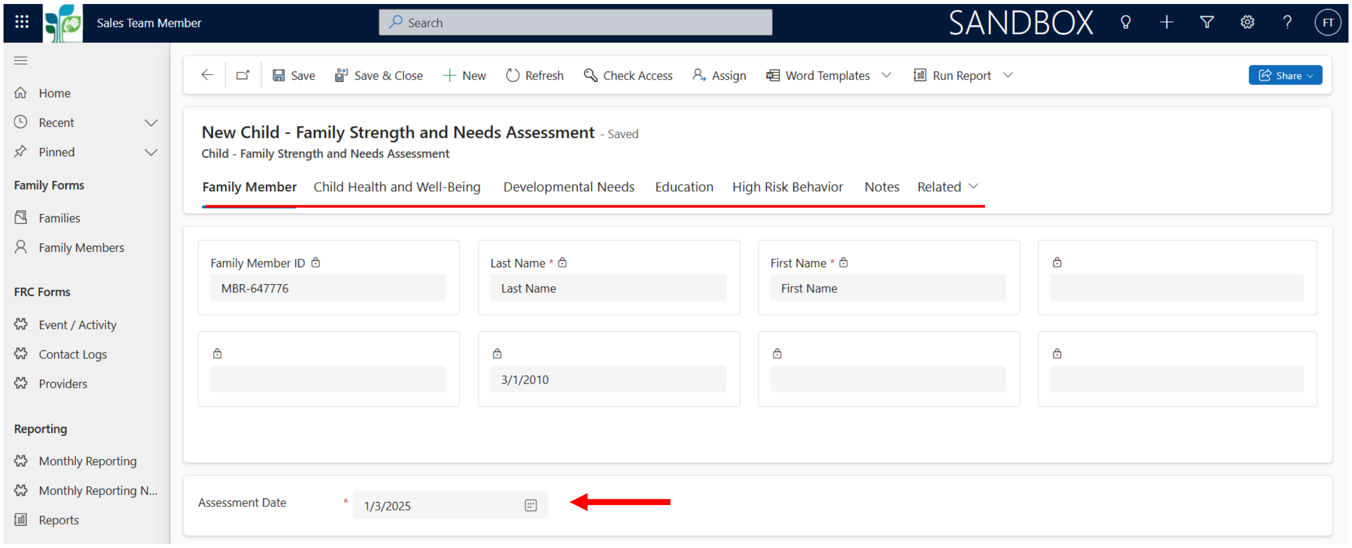
1) In the CRA/at-risk CRA's Family Member record, select the "**Related**" tab (or 3 dots). Then, select "**Child – Family Strengths and Needs Assessments**".



2) To enter this portion of the assessment, select "**+ New Family – Family Strengths and Needs Assessment**".

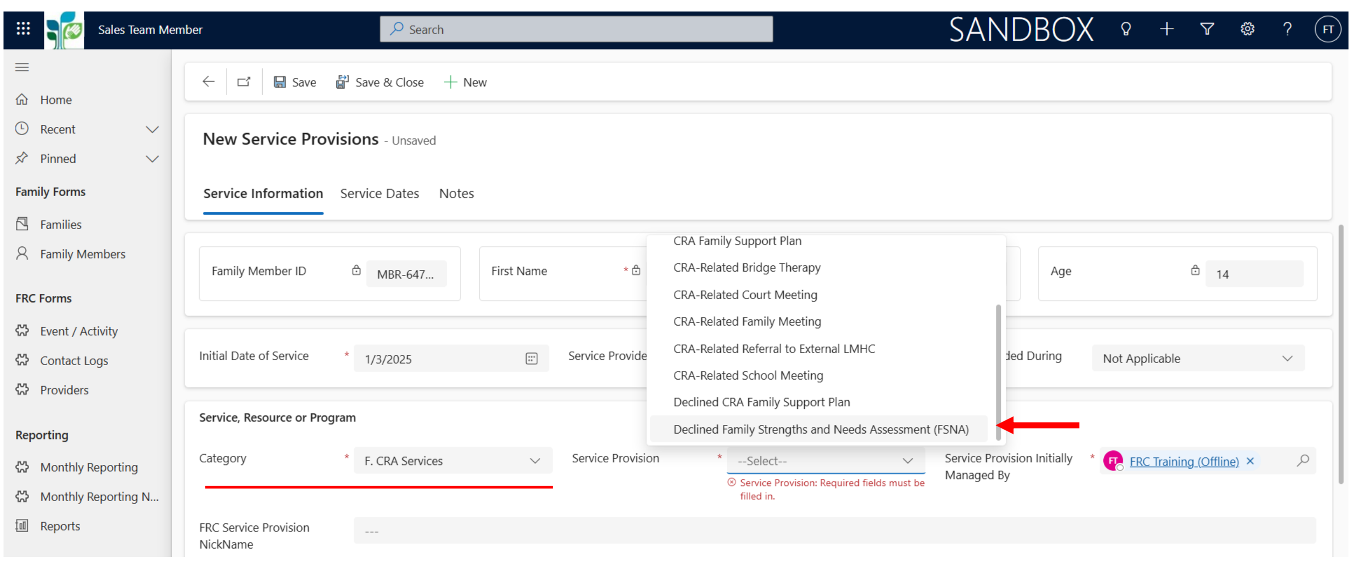


3) Enter the “**Assessment Date**” and all other assessment information. Once complete, select “**Save & Close**”.



Documenting a Declined FSNA

1) In the CRA/at-risk CRA’s Family Member record, create a service provision record.
   - For “**Category**”, select ‘CRA Services’. Then for the “**Service Provision**”, select ‘Declined Family Strengths and Needs Assessment (FSNA)’.
   - For further information on entering a service provision record. See section, Service Provisions, for further guidance on how to document a service provision.



H. 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.*

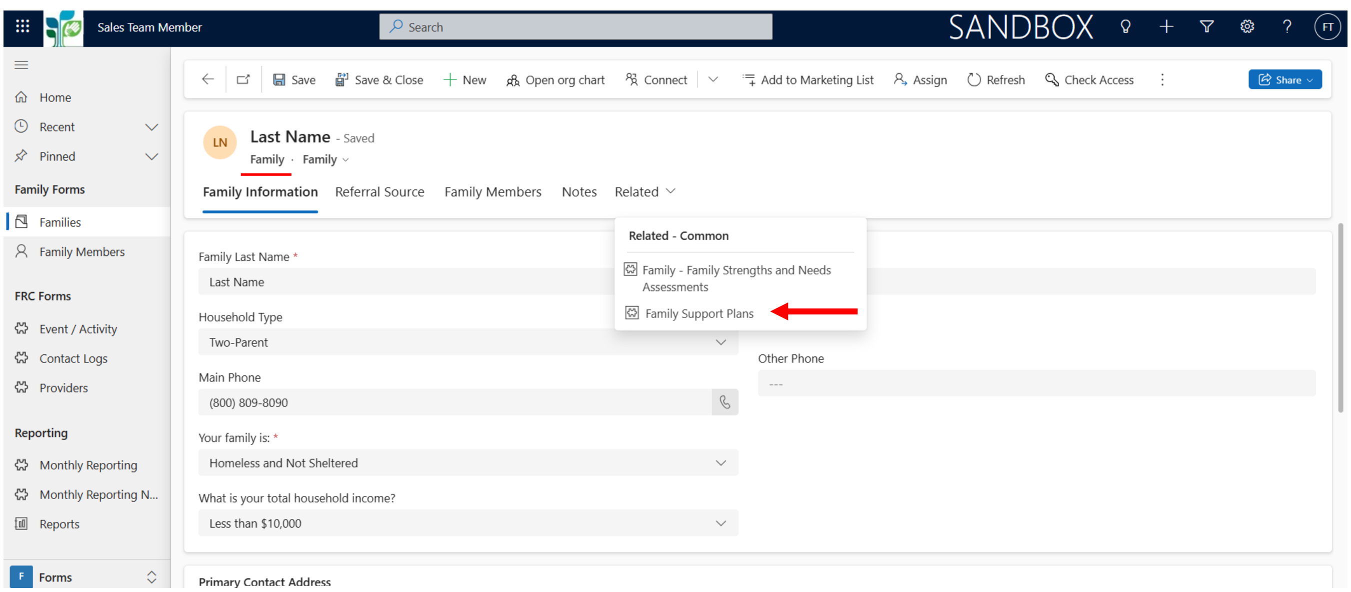
A Family Support Plan is offered and developed for all CRA related families as well as any non-CRA related families that may want one. This plan documents goals the family has identified along with service provisions that will help them achieve those goals.

If the Family Support Plan is CRA related and the family engages with the plan, it is essential the "Plan Original Date" and according "Plan Modified Date(s)" in the CRM are <u>on or after</u> the identified child/youth's "CRA Indicator Last Set On Date". For more information on this field, see section "CRA Related Questions". It is also essential the CRA related Family Support Plan is uploaded to the CRM each time one is created and modified to properly inform the FRC Workplan reports.

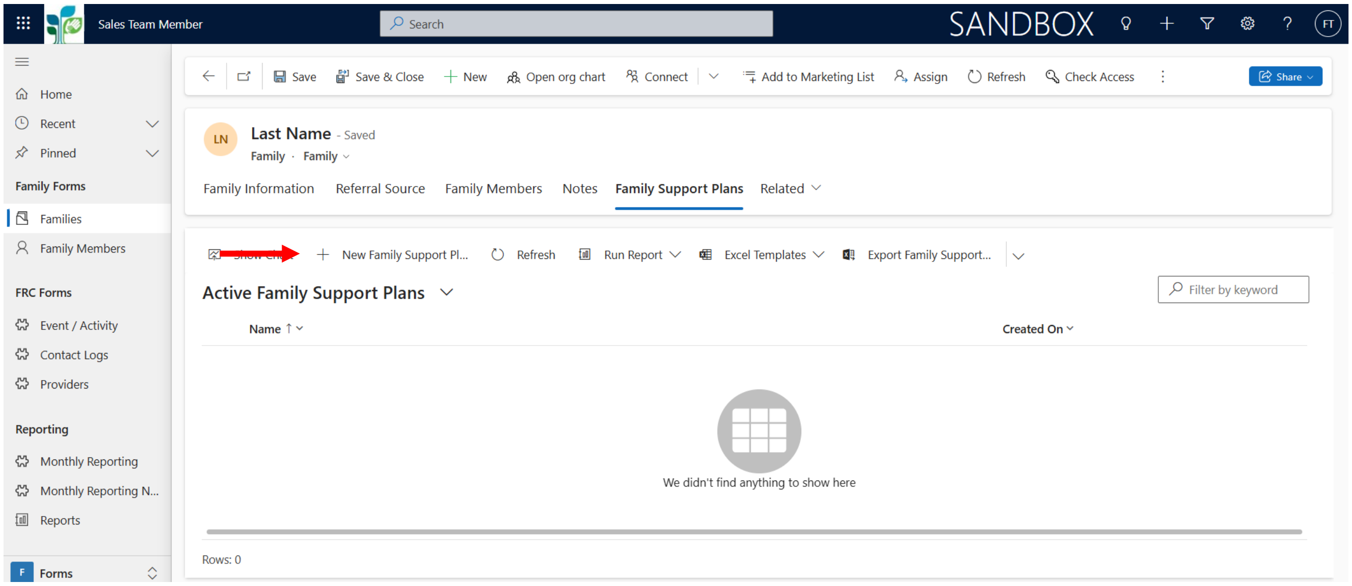
If the Family Support Plan is CRA related and declined, enter a 'Declined CRA Family Support Plan' service provision. See section, "Documenting a Declined FSNA", for similar guidance and a visual.

To create a Family Support Plan:

1) Navigate to the family's record and select "**Related**" (or 3 dots), then select "**Family Support Plans**".

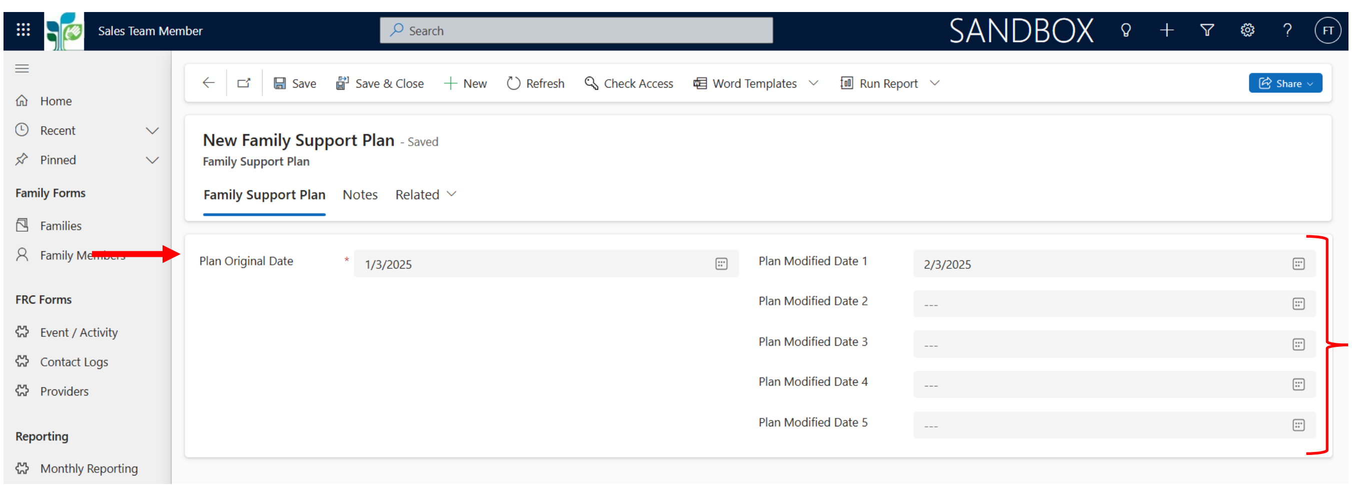


2) Next, select "**+ New Family Support Plan**".

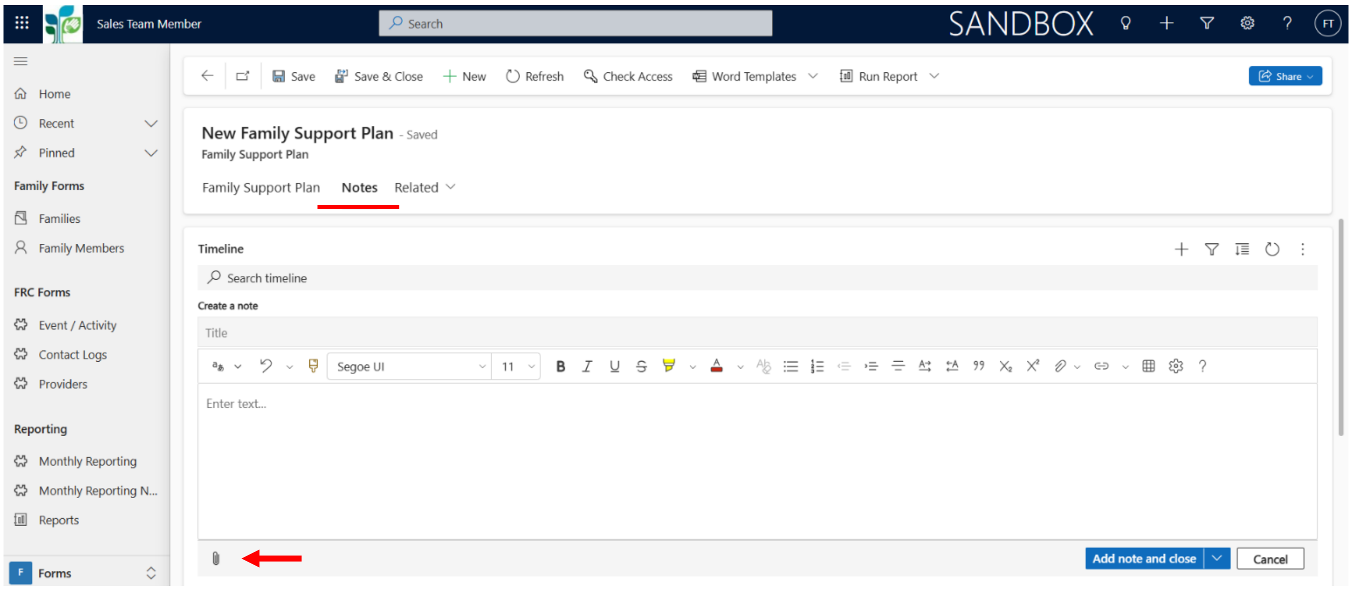


3) In the "**Plan Original Date**", enter the initial date the plan was created with the family. Then select "**Save**"

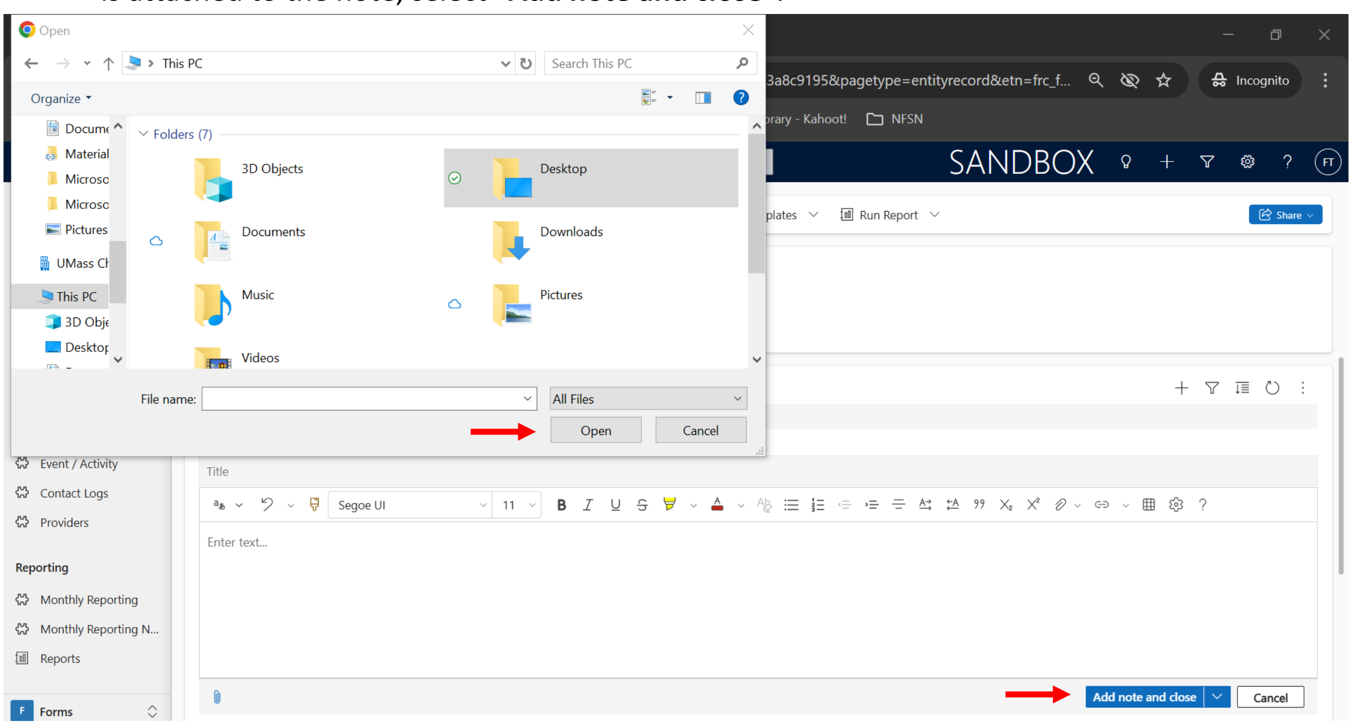
- When the plan is modified or updated, <u>do not</u> create a new Family Support Plan record. Instead enter the date the plan was modified or updated in a "**Plan Modified Date**" field.



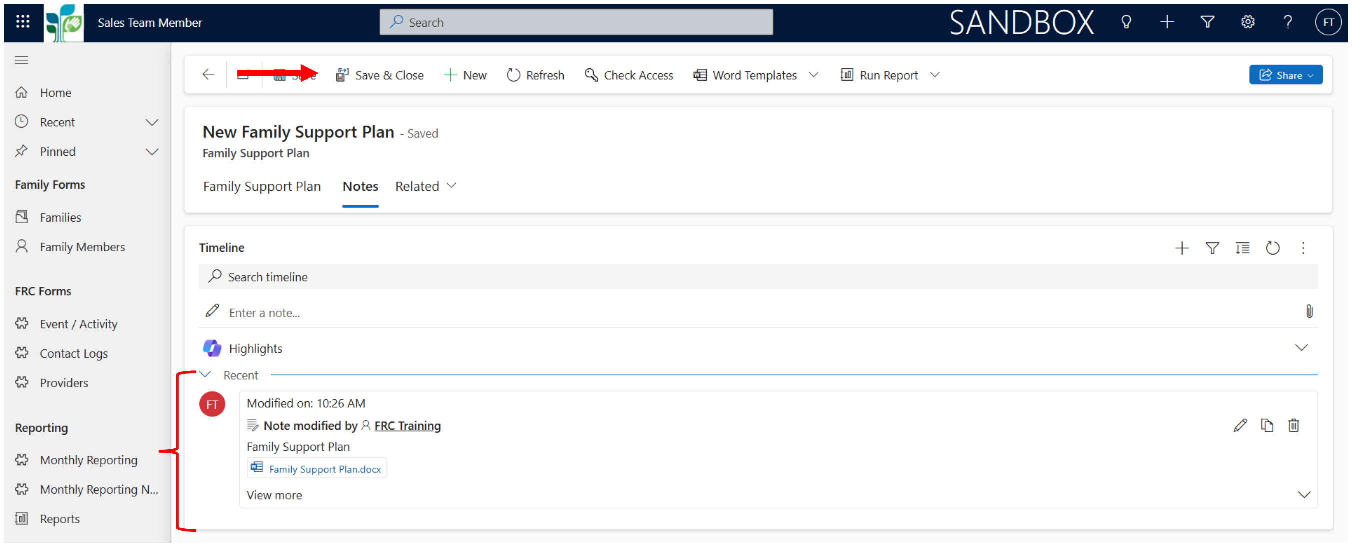
4) Once the date information is saved, go to the "Notes" tab next to the "Family Support Plan" tab. Create a note to upload the Family Support Plan into the FRC CRM database by selecting the paper clip icon.
   - Each time the plan is modified or updated, upload the new copy of the family support plan.



5) From your computer files, select the family support plan and attach it to the note. Once the file is attached to the note, select "**Add note and close**".



6) Once complete, select "**Save & Close**".



I. Event/Activity

An Event/Activity, also known as **FRC Standard Form F – Event/Activity**, are public community engagement and outreach events/activities coordinated by your FRC or coordinated by another organization that your FRC collaborates with.

Event/Activity participants may or may not be Families and Family Members that already completed FRC intakes. All participants at any Event/Activity, regardless of their FRC intake status, *are to be* counted as Event/Activity attendees.

If there is an Event/Activity attendance for an already intaked family member, you may also document their engagement with the event/activity 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).

Event/Activity examples are, but not limited to:

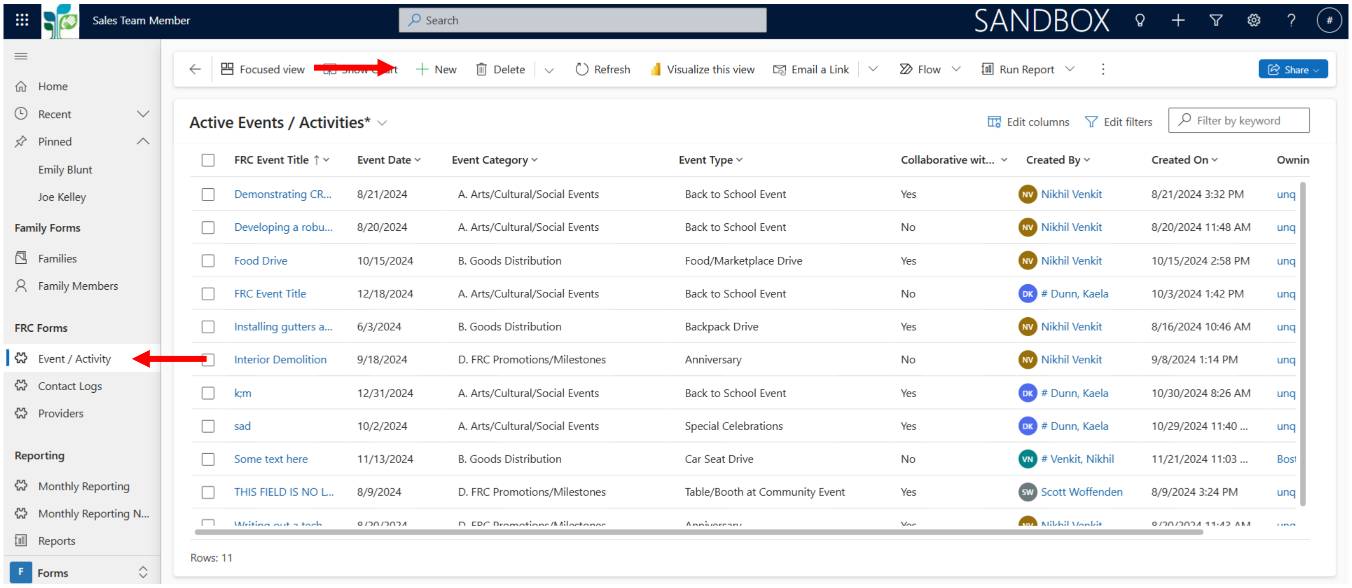
- FRC Basic Services – Arts/Cultural/Social events
- Public drives, clinics, and child safety programs
- FRC Anniversary celebrations or an Open House
- FRC Staff tabling at another agency/organization's event

NOTE: Do not 'Deactivate' an event/activity record. If you need the record deleted or need any assistance, contact FRCHelp@umassmed.edu.

Family Resource Centers

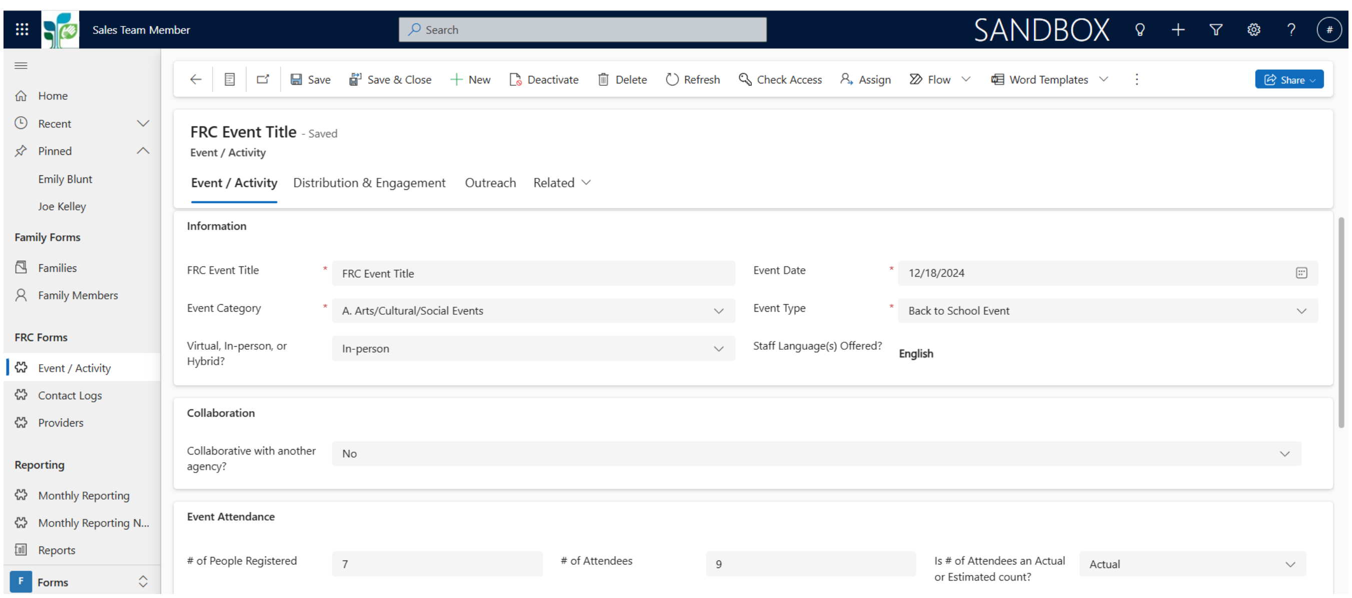
To create a new Event/Activity record:

1) Select "**Event/Activity**" on the navigation panel, then select "**+ New**".



2) Fill in all relevant information in each tab: "Event / Activity", "Distribution & Engagement", and "Outreach". Once complete, select "**Save & Close**".

- The required fields to save an Event/Activity record are the "**FRC Event Title**" and "**Event Date**", "**Event Category**", and "**Event Type**".
- Although not required, "**# of Attendees**" and "**Is # of Attendees an Actual or Estimated count?**" are important data points for reporting and are in the FRC Monthly Tableau report.
- See section "Event/Activity Field Definitions" for more information on each field.



Event/Activity Field Definitions

1) FRC Event Title*: The name the FRC or collaborative agency gave the event.
2) Event Date*: The date the event occurred.
3) Event Category*: The category the specific event/activity is listed in.
4) Event Type*: The specific event/activity from the category list.
5) Virtual, In-person, or Hybrid?: How or where the event/activity was held.
6) Staff Language(s) Offered?: The language(s) used at the event/activity to communicate with attendees.
7) Collaborative with another agency?: Indicate if the event/activity was offered to the public through a conjoint effort with another agency/organization.
8) (if 'Yes' to #7) Describe FRC's Role: Indicate the FRCs role(s) in order to provide this event/activity to the community.
9) (if 'Yes' to #7) Name of Agency 1-5: Indicate the agencies the FRC collaborated with to offer this event/activity to the community.
10) # of People Registered: If there was a registration for this event/activity, provide the number that registered.
11) # of Attendees: Provide the number of participants that attended or engaged with the event/activity.
12) Is # of Attendees an Actual or Estimated count?: Indicate if the number is a precise count (actual) or an approximate (estimated) count.
13) Target Audience?: Indicate the groups this event/activity was hoping to engage or was created for.
14) # of Parents/Adult/Caregiver Attendees & Actual or Estimated count?: Provide the number of attendees at the event/activity that in this group as well as indicate if the count is precise (actual) or approximate (estimated).
15) # of Tween/Teens (ages 11 - 17) Attendees & Actual or Estimated count?: Provide the number of attendees at the event/activity that in this group as well as indicate if the count is precise (actual) or approximate (estimated).
16) # of Children/Youth (ages 0-10) Attendees & Actual or Estimated count?: Provide the number of attendees at the event/activity that fall in this group as well as indicate if the count is precise (actual) or approximate (estimated).
17) Was a basic good offered at the event?: Indicate if a tangible basic need was given to a family/individual at the event/activity.
18) (if 'Yes' to #17) 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.
19) What methods were used to engage attendees?: Select one or more methods used to support families in attending the event/activity.

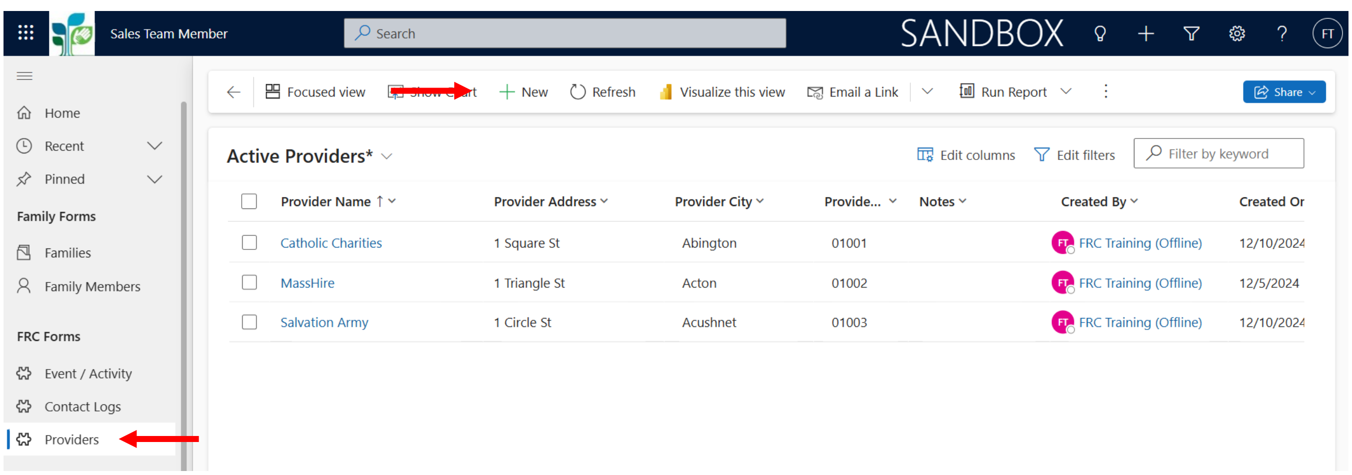
20) Did other agencies table at the FRC event (not one of the agency collaborators)?: Indicate if another agency attended the event to provide information on their organization to the event/activity attendees.
21) (if 'Yes' to #20) How many agencies?: Provide a total count of the agencies that attended.
22) What outreach method(s) were used?: Select one or more methods used to notify or market the event/activity to the public community.

J. Providers

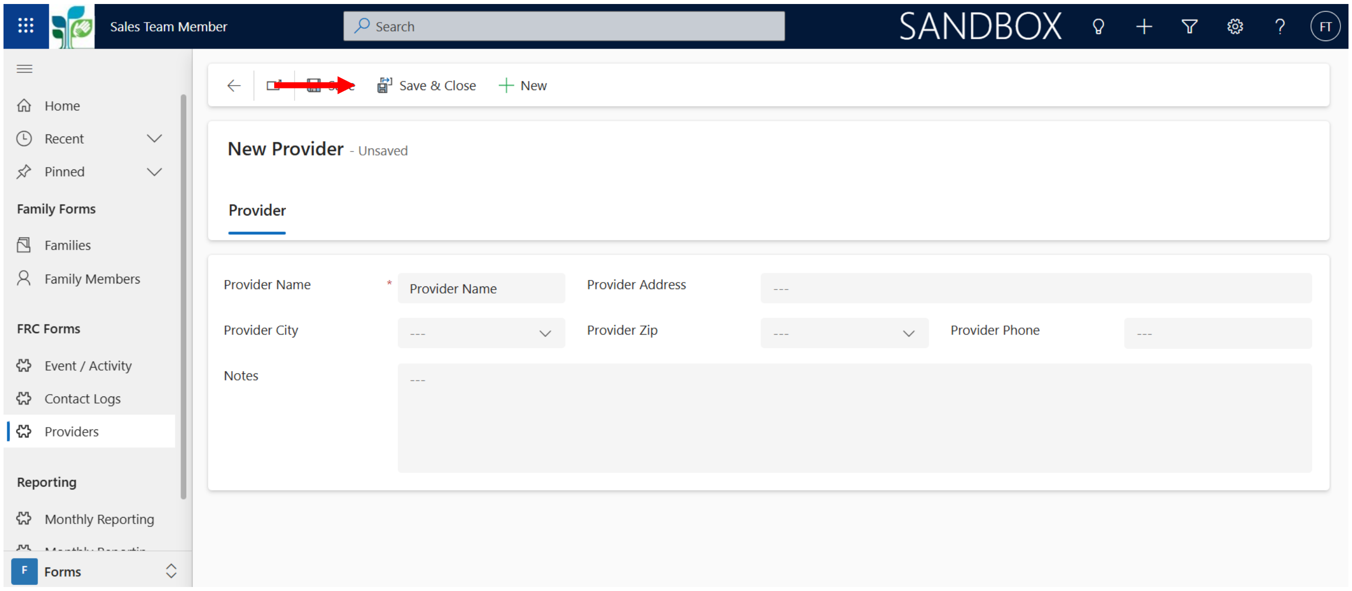
The Providers section, translatable to **FRC Standard Form D[1] – Provider Referral**, contains a list of other agencies/organizations your FRC commonly refers families and individuals to. If your FRC provides families and individuals handouts with information for two or more agencies/organizations, you may create a Provider record for the handout.

Each provider record is accessible in a family member's service provision section as well as a contact log record so you may indicate the provider, or handout, the family/individual is referred to.

1) To begin, select "**Providers**" on the navigation panel. Before creating a new Provider record, it is best practice to check if the provider, or handout, is already listed. If you need to create a new record, select "**+ New**".



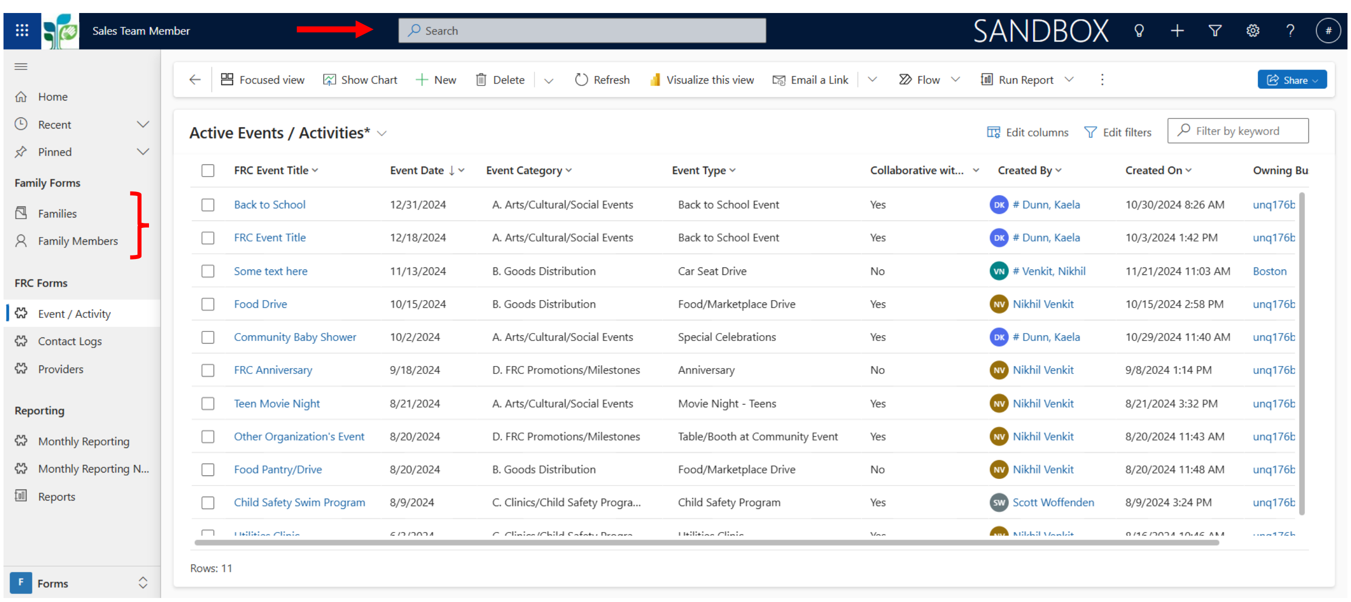
2) Fill in all relevant information related to the provider or handout. Once complete, select “**Save & Close**”.



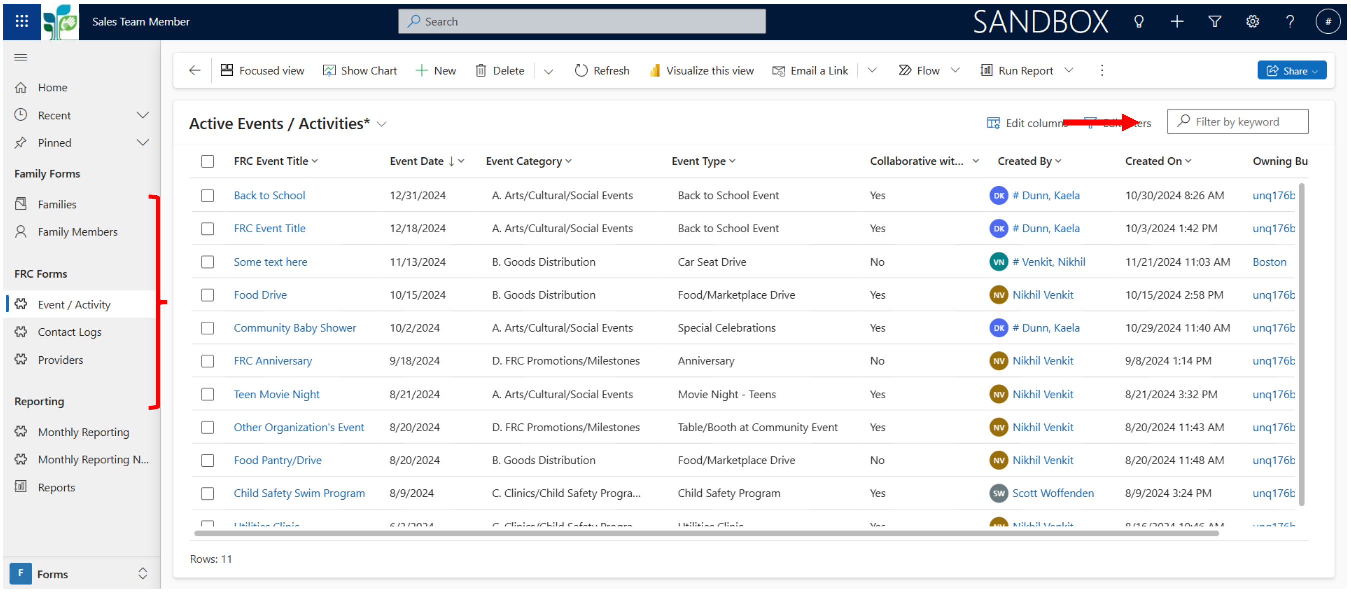
K. How to Search in the FRC CRM Database

There are many records in many different sections of the CRM! There are a few different methods of searching such as using the search bar at the very top of the screen, the search bar in the top right corner of the page, as well as filtering the column headers.

1) The search bar at the top of the page will search the records on the “Families” and “Family Members” pages.

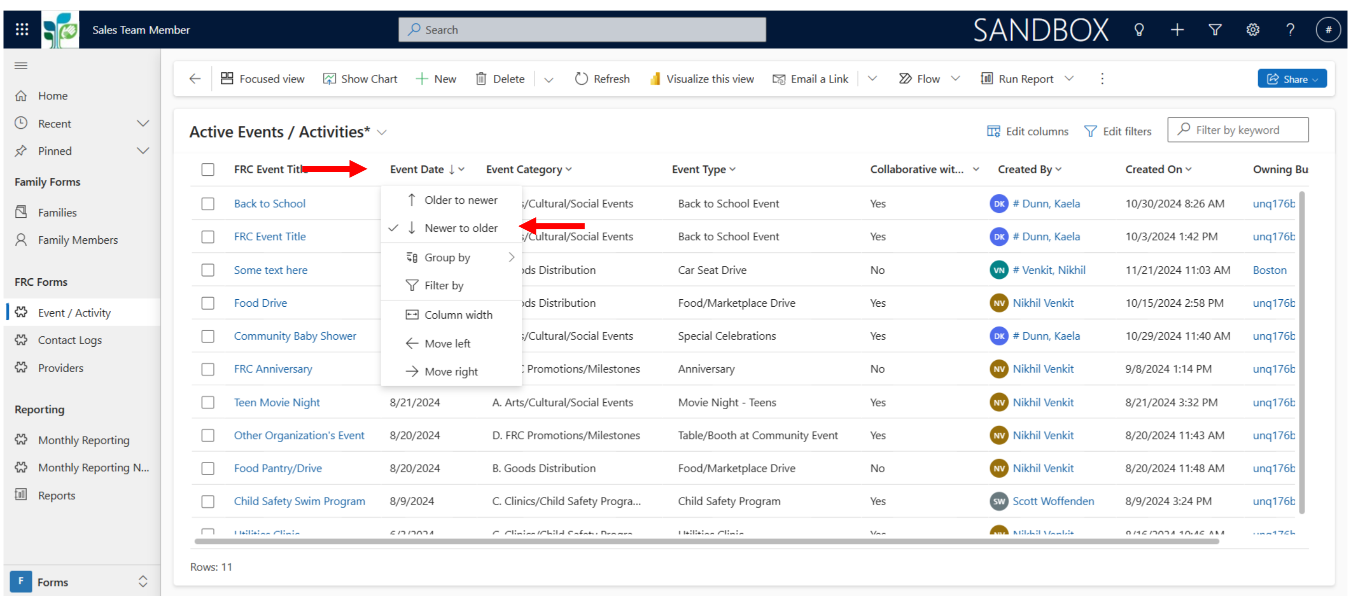


2) Each homepage of the 5 sections accessible on the navigation panel have a search bar in the top right corner of the page. This search bar will search through data within a specific column on that page.

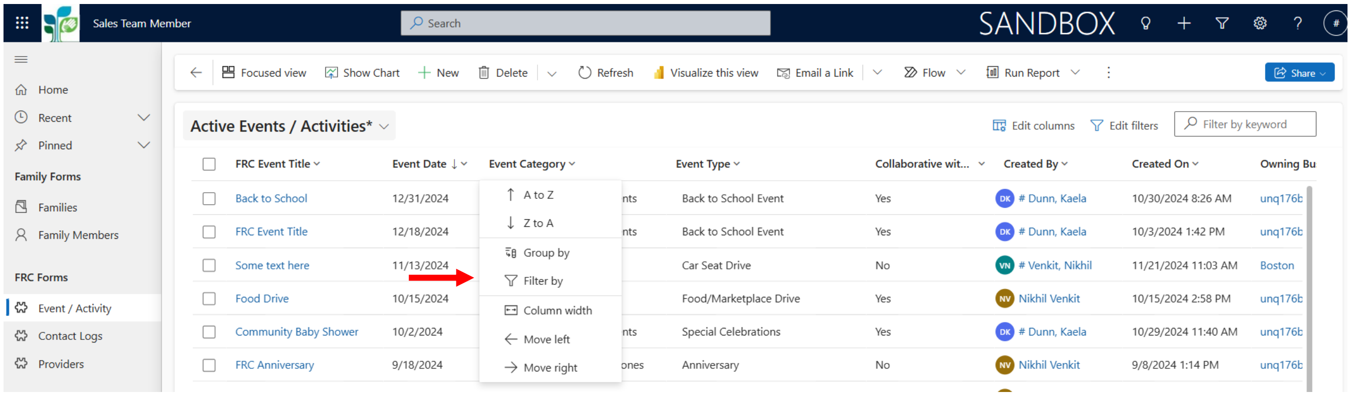


3) Beyond the search bars, there is an ability to filter any column in <u>any</u> section of the CRM. This means you can filter columns in sections that are not accessible on the navigation panel, such as service provisions, service dates, and family support plans. To filter any column header, click on the column header. In the menu that popped up select a filtering option.

- Below you see the "Event Date" being filtered from "Newer to older" meaning all records on the page will sort to have event dates closest to the present date at the top and have the event dates farthest from the present date at the bottom.

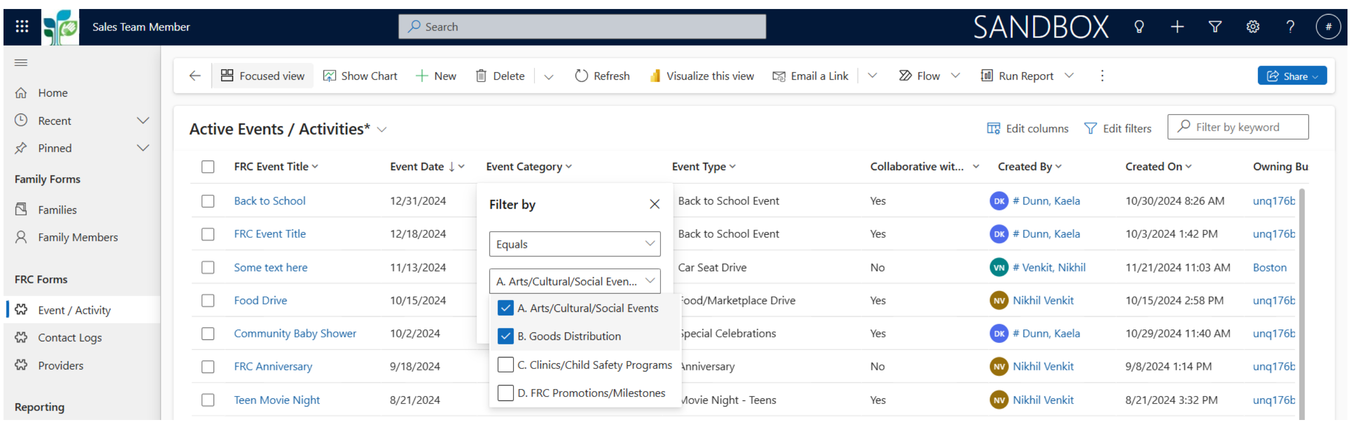


4) Another way to filter using this menu is selecting, “**Filter by**”.

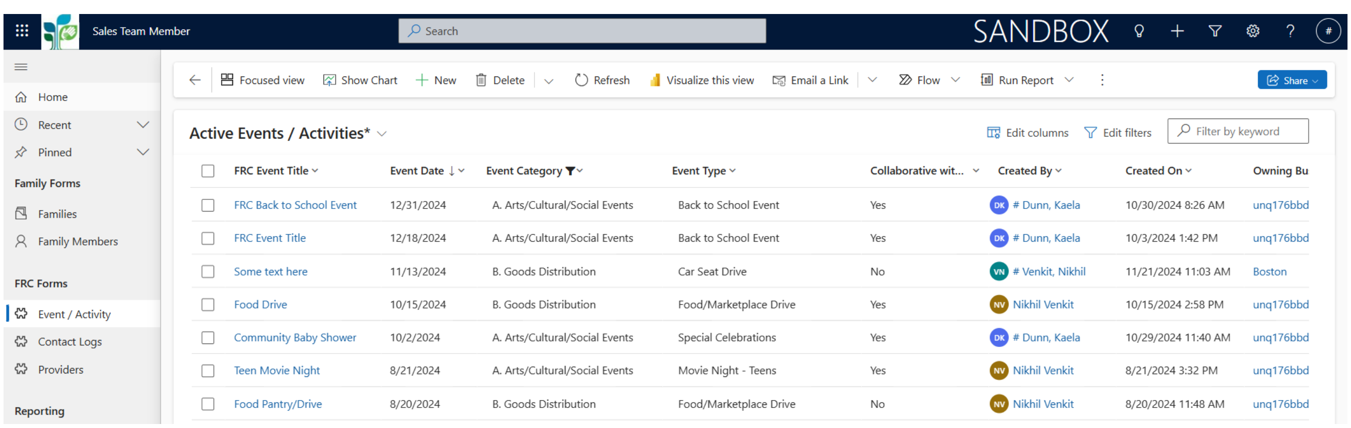


5) If the column you selected is a drop-down list type of field, you will be presented the drop-down list to select one or more options to filter the column by.

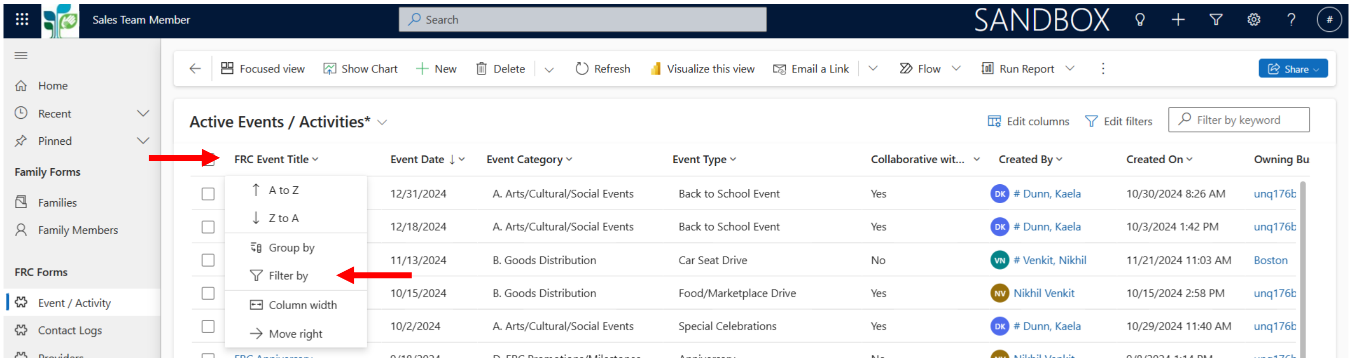
- Notice the first field states “Equals”. This means the column will filter to only include the options that have been selected.



6) Notice the “Event Category” column now only displays records labeled with category A or B.

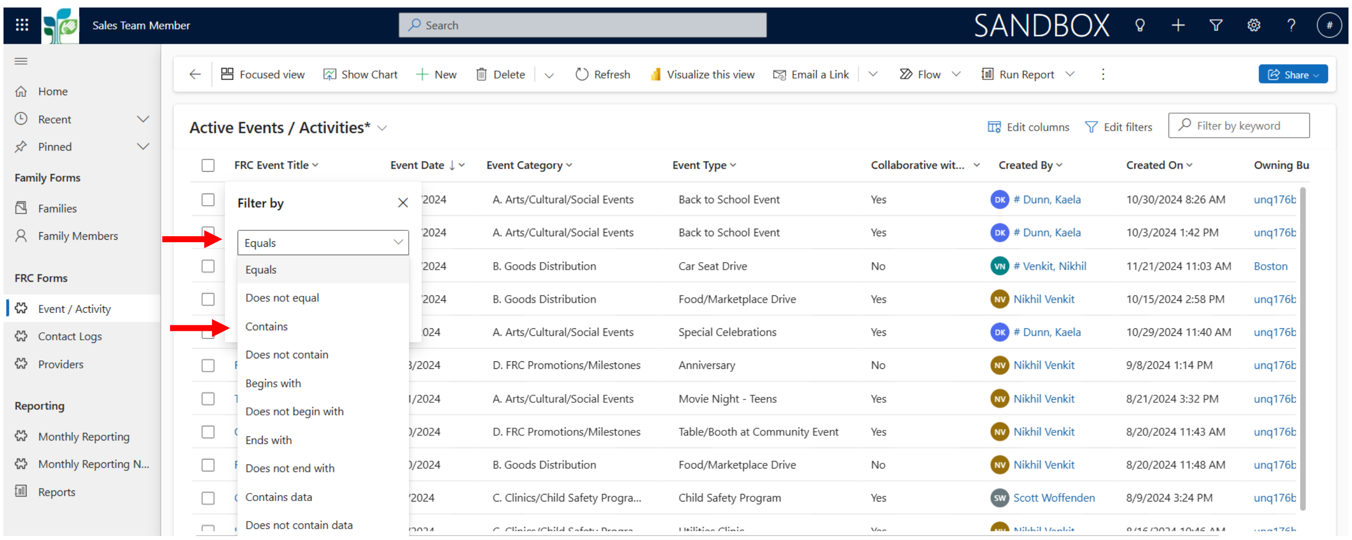


7) To filter on columns that do not contain a drop-down list and instead are open write-in style fields, we will still select the column header. Then “**Filter by**”.



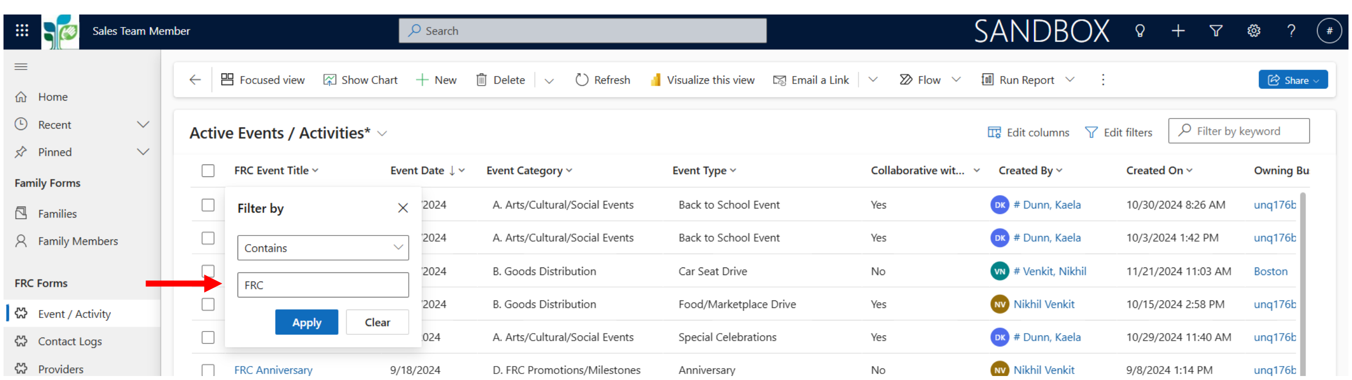
8) Select the drop-down list that states “**Equals**”, then select a requirement to filter the text by.

- For this example, we are going to select “**Contains**”. This means the filter will keep records that contain the text we filter by.

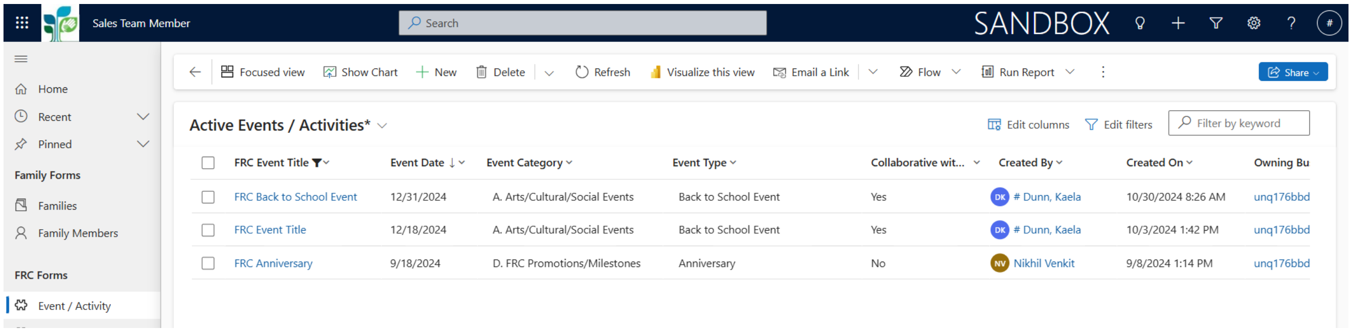


9) Next, in the open text field, write-in the text you want to filter the column by.

- To continue with the example, we wrote “**FRC**”. Once we apply this filter, we will only see records that have the text, “**FRC**”, in the “**FRC Event Title**” field.



10) Notice the "**FRC Event Title**" column now only displays records that contain the text, "FRC".



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