FRC CRM Database Training

with the FRC’s Administrative Service Organization (ASO)

Family Resource Centers

Today's Agenda

1. Training Introduction
2. FRCMA.org, FRConnect, and QuickConnect
3. FRC CRM Database Introduction PPT
   - Who is the ASO?
   - Microsoft and your @Community-Family.org account
   - FRC Operational Service Flow & Database Structure
4. FRC Standard Forms & CRM Database walkthrough

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After completing today's training, you will receive via email…

- Receive a brief anonymous survey about today's session
- PDF handouts including:
  - This PowerPoint
  - FRC Operational Guide
  - FRC Standard Forms
  - FRC Process Guide and Database Instructions
    - + instructions on how to check if your CRM account is in the correct time zone
  - FRC CRM Database Trainings & Office Hours Calendar
- If you are a new FRC staff member that has never completed a CRM training:
  - You will receive an @Community-Family.org account within 5 business days
  - You will receive an FRConnect account within 2 business days

Friendly Reminders for Today's Session

- Type your name, position, and FRC in the chat!
- Please stay muted unless speaking
- If you have a question during today's session, please type it in the chat or raise your hand
- If you have a question after today's session, please come to office hours or email FRCHelp@umassmed.edu for assistance

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Today's Training Goals

1. Introduce FRCMA.org, FRConnect, and QuickConnect

2. Introduce the FRC CRM Database

3. Stay engaged to the best of our ability

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Grounding/Self-Regulation Activity

- Please take a minute to fill up your cup by doing your preferred grounding/self-regulation activity
  - Stretching (especially arms and wrists)
  - Heel/toe raises
  - Breathing exercises
    - Diaphragmatic breathing

Perennials
New England Winter Flowers

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FRC CRM Database Introduction

with the FRC's Administrative Service Organization (ASO)

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Who is the Administrative Service Organization (ASO)?

- ForHealth Consulting at UMass Chan Medical School
- Supports DCF and the Family Resource Center Network with:
  - Program Management, Development and Support Consulting
  - Marketing & Communications
    - FRC marketing materials, FRCMA.org website, FRConnect intranet, and QuickConnect email newsletter.
  - Data Management & Training Services
    - FRC CRM Database, Tableau, and Technical Assistance
  - Research & Evaluation
    - Program Evaluation services, FRC Satisfaction Surveys, and Annual Legislative Report

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Administrative Service Organization (ASO) Contacts

FRCHelp
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FRC CRM Database

- A Microsoft Dynamics 365 Client Record Management (CRM) System
  - Based on the FRC Standard Forms
  - Using a database helps manage data and create reports
- Accessible online from any location at any time
  - Sign into https://myapps.microsoft.com/ with your FirstName.LastName@Community-Family.org username
- If you need any assistance managing your account or using the system, please email FRCHelp@umassmed.edu

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What is the FRC CRM data used for?

CRM Data is used daily, monthly, yearly, etc.!

- Any data requests your FRC or the State may have (e.g., FRC applying for a grant)
- Tableau (e.g., FRC Benchmarks, FRC Monthly Report)
- ForHealth Consulting at UMass Chan's Annual Legislative Report

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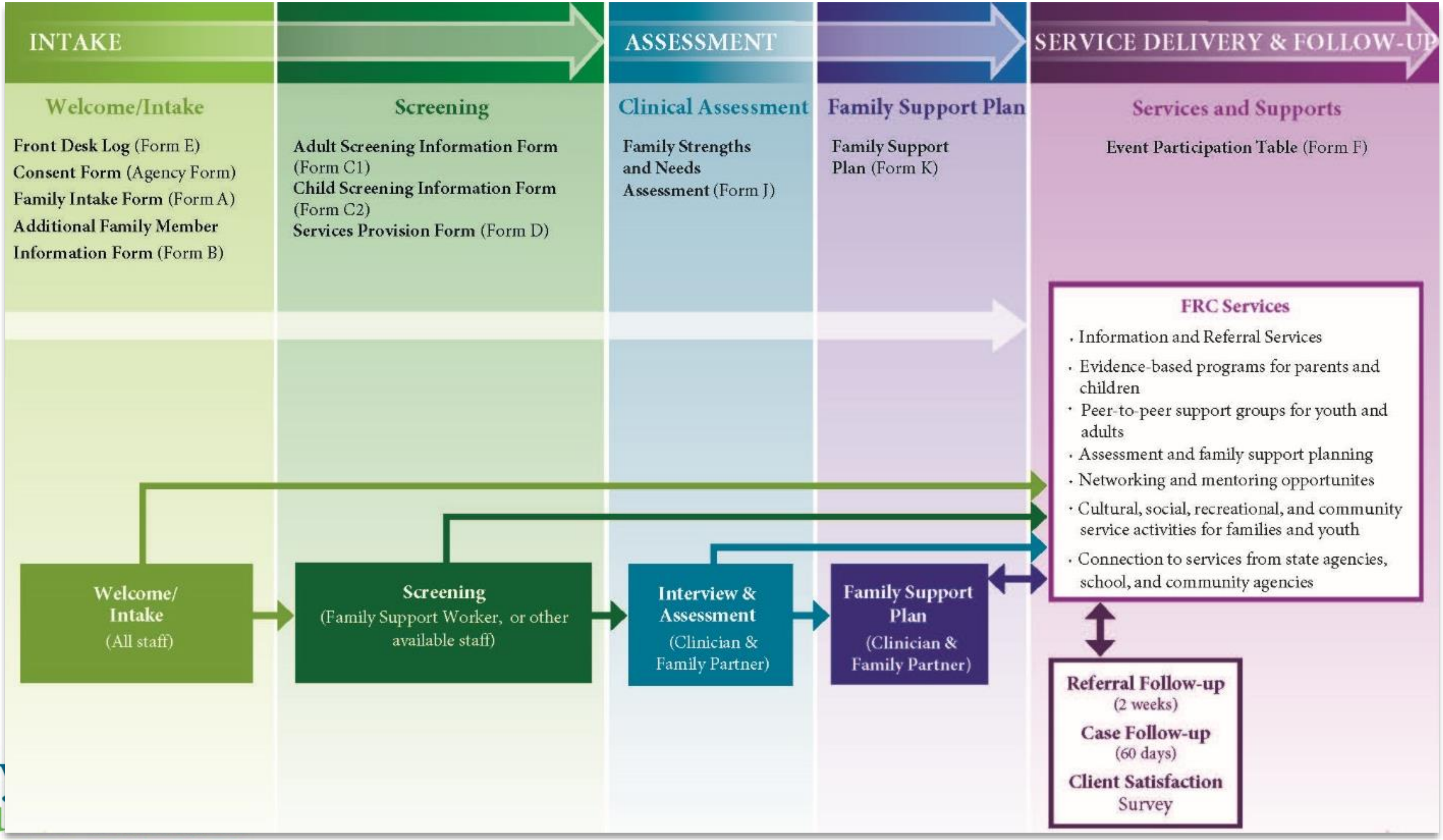
FRC Operational Service Flow



FRC CRM Database Flow and Structure

Independent CRM sections not tied to the Family and Family Member records

FRC Standard Form E - Contact Logs aka Contact Log CRM record

Communication, unrelated to an intaked family/member, with other organizations or a general community member

FRC Standard Form F - Event/Activity aka Event/Activity CRM record

Public community engagement and outreach events or activities coordinated by your FRC or coordinated by another organization that your FRC collaborates with.

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FRC CRM Database Flow and Structure

FRC Standard Form A – Family Intake aka Family CRM Record

FRC Standard Form B – Family Member Intake aka Family Member CRM record

Family Members can only be created inside a Family record. More information on the next slide!

FRC Standard Form J – FSNA aka Family FSNA CRM record

One half of the assessment FRC clinician's conduct with a CRA/at-risk CRA youth and family.

FRC Standard Form K – Family Support Plan aka Family Support Plan CRM record

Goals a family has identified along with service provisions that will help them achieve those goals. For all families, not just CRA/at-risk CRA youth and families.

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FRC CRM Database Flow and Structure

FRC Standard Form B – Family Member Intake
aka Family Member CRM Record

FRC Standard Form C1 – Adult Screening / FRC Standard Form C2 – Child Screening aka Adult or Child Screening CRM record	FRC Standard Form J – FSNA aka Child FSNA CRM record	FRC Standard Form D – Service Provisions aka Service Provision CRM record
Detailed information about the respective adult or child family member.	One half of the assessment FRC clinician's conduct with a CRA/at-risk CRA youth and family.	Direct FRC services and/or external provider referrals given to a FRC intaked family member.

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Training Takeaways

Training Takeaways

I. General
   1) Data must be entered within 60 days of the present date.
      - FRC Managers & Directors must submit the previous month's data to DCF by the 15th of the following month, so please enter your data as regularly as possible.
   2) Only the FRC Clinician can conduct the Family Strengths and Needs Assessment
   3) All members receiving services should receive either an Adult or Child Screening. All FRC staff members can conduct a screening.
   4) If emailing FRCHelp@umassmed.edu about any CRM information, do not email Personal Identifying Information (i.e., names, birthdates, etc.). Email the Family record identification number (FAM-ID) and/or Family Member record identification number MBR-ID along with general information about the record.

II. Family Record
   1) Each family record needs at least one indicator checked off on the "Referral Source" tab.
   2) Each family records needs a "City" identified.
      - 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.

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Training Takeaways Continued…

III. Family Member Record

1) Only change "Services Needed" to 'Yes' if the family member will be completing a full FRC intake and receiving direct FRC services and/or external provider referrals.
2) Race & Ethnicity data is strongly encouraged to collect because these data points are included in the report given to the state legislature.
   - There are options for "Not Applicable" and "Chose Not to Answer".
3) S-2-CRA Related Questions tab only displays if the family member is 17 & under. After questions are initially answered, they become locked. Only the FRC Program Director, Program Manager, and Clinician can edit all three fields on this tab.
4) A release of information should only be stored under an adult record.
   - Skip the "Name of Child/Youth" field if the release of information is for the respective adult.
5) Under Service Provisions, the "Initial Date of Service" is the first date the person engaged in that service or received an external provider referral. Additional "Service Date(s)" should only be entered if that person is returning to participate in the same exact service or receive the same referral.
   - "Service Date(s)" should never match or be a date prior to the " Initial Date of Service".

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The 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
- 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)

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The Events / Activities…

Is for

- Documenting outreach and engagement events/activities open to the general community hosted by the FRC or another organization the FRC collaborates with
  - Includes FRC basic services: Art/Cultural/Social events
- 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)*

What if the service/event is not available in the CRM?

1) Consult your Program Director/Manager.
    - Your FRC may already have guidance in place.

2) If you are the Program Director/Manager and do not have guidance for the specific service or event/activity – you will fill out the new **Service Provision & Event/Activity Guidance and Suggestion Form**!
    - The ASO will provide data entry guidance or add the service, event, or activity to the CRM.

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Commonly Used Qualtrics Form Links

- For all FRC Staff
  - FRC Training Requests and Registrations Form: Pre-register for DCF funded trainings or express interest and be put on a waitlist for a program that is not scheduled yet.
- Only for FRC Site Management
  - Service Provision & Event/Activity Guidance and Suggestion Form: Contact the DCF-ASO team about a service or event not listed on the FRC Standard Form and CRM.
  - FRC Staff Changes and Updates Form: Submit this form each time a FRC staff is hired, resigns, or changes positions. Information is used to manage CRM accounts, FRConnect accounts, and contact lists.
  - Data Request Form: Request any data for any reason from the ASO. Allow 5 business days for the request to be fulfilled.

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