FCFC Customer Relations Management (CRM) System
Frequently Asked Questions
2022

CRM Functionality Questions

1. **Is this system just for Service Coordination and Wraparound?**

   The system will be able to support documentation of all youth and families served, regardless of funding source.

2. **Since we will now be migrating out of EHR, is there thought being given to how this system will be able to communicate with the system that will be tracking kids & youth being served under Ohio RISE?**

   The new system does have the capability to support interfaces, but interfaces would have to be part of future discussions as they are not in scope at this time due to our tight timeline.

3. **Will there be a several trainings offered for the new system and its functionality?**

   Yes, there will be multiple opportunities to attend training as well as recorded trainings.

4. **If we are using another system other than Fidelity, what is the calendar for data transfer?**

   Councils using an automated system, other than Fidelity, will not be required to use the new system at this time. However, any councils not using an automated system will have to use the new system, as data reports will not be manually calculated in SFY23.

5. **Are counties able to add metrics that are required by other funders?**

   OFCF plans to address reporting needs in Phase 2 and Phase 3 of development. Staff will spend time learning the reporting needs of FCFCs, including whether standardized metrics can be incorporated into the system. Phase 2 is projected to be available January 2023 and a timeline for Phase 3 is TBD.

6. **Is there a commitment to fund this system on an on-going basis? Beyond/ across Administrations?**

OFCF is committed to this system and our state sister agencies are supportive of this direction. However, there is no way we can speak for a future administration.

7. **Will you need us to report all funds that are being spent on families/Admin regardless of funding source or will you just need us to report this information like we currently report- spending of FCSS, MSY Admin, OCBF, JFS MSY?**

   FCFCs will only be required to document funds provided by OFCF; however, the future state plan is that the system will be able to support documentation of all youth and families served, regardless of funding source.

8. **Are there going to be universal outcomes built in to show youth/families are satisfied and getting better through SC/Wraparound?**

   OFCF plans to incorporate measurable outcomes in a future phase of implementation and is interested in your feedback about what these outcomes should be.

9. **Will the new system be able to help us with sending out reminders to family teams regarding upcoming family team meetings?**

   OFCF will work with our OIS partners to determine what notification functionality is available in the new system. Once we have this information, we will incorporate feedback from users as notifications are developed.

10. **Will we be able to share documents with family team members out of this system or will they have access to the system at a limited level?**

    OFCF will work with our OIS partners to develop a user security profile for family team members based on available functionality.

11. **Every so many years OFCF ends up with another system i.e., OMHAS, will this system be available to all state depts as we move forward.**

    This system will be an OFCF product and can move with OFCF, if the office moves. However, we cannot to speak to whether another state department would have developers familiar with a .NET platform.

12. **Will there be a way to link family members (like siblings) in the system?**

    OFCF has been communicating with our OIS partners to determine ways to link family members and functionality to clone a youth's case so if siblings are being served by a FCFC, demographic information does not need to be reentered. This functionality will be available in a future phase.

13. **Will there be a case note/documentation feature?**

Yes, there will be a case note feature.

14. **Is the platform for data only or will it also function as an electronic means for completing local service coordination tools/forms?**

    The system will generate tools and forms based on the data entered into the system.

15. **Will there be an option to share data/POC in this system to MSY application packets and update reports?**

    This functionality will not be available initially, but OFCF will work with the State MSY Team to determine what is feasible in the future.

16. **Can we please incorporate state MSY tracking capabilities? For example, the local data system we purchased in Summit Co. allows us to track due dates for 30-day program updates and track when fiscal invoices are sent to ODM. It sends us reminders.**

    OFCF will work with our OIS partners to determine what notification functionality is available in the new system. The system will also allow documentation of services and supports provided and the corresponding fund(s), not just FCSS funded services.

17. **One of the issues that we had with Fidelity was the need to upload so many forms. There may be benefit of fillable forms to allow for printing...those that are consistent with SC forms**

    Forms will be developed in the system that will then generate with the data that is entered into the system. There will also be an upload capability. The concern with fillable forms is the data is not in stored in the database so if this data is needed in the future for additional forms, the data has to be reentered.

18. **Any thought to how we could use this for data collection on our Shared Plans?**

    As shared plans are typically not youth specific, we are interested in hearing feedback from FCFCs as to what they hope to see in the system.

19. **Will the CANS rating forms be in this system?**

    There will be fields available to enter information about the CANS assessment (who participated, when it was conducted, outcome, etc.) but the actual CANS tool will not be built in the system.

20. **Can you repeat the date on which CRM will be available?**

    We are working with our OIS partners to finalize a Go-Live date. We will share the date as soon as it is official.

21. **If we are expected to complete the CANS in the Ohio Children's Initiative, does that mean that we can bill Medicaid for them without becoming a provider?**

    There are multiple steps to becoming a Medicaid billable provider. We recommend reaching out to the Department of Medicaid (ODM) with any questions.

22. **Will we be able to create custom forms in this new system?**

    OFCF plans to address reporting and custom form needs in Phase 2 and Phase 3 of development. Staff will work with Councils to determine what forms and reports are needed, and then work with the development team to develop them in order of priority.

23. **Will we need to continue to complete the monthly spreadsheet for FCSS reimbursement after July 1 or will the new system give the state office what they need?**

    OFCF's goal is to develop the monthly submission spreadsheet in the CRM so councils do not have to manually track any data. Councils will need to review and attest that the data is accurate prior to OFCF processing payment for that time period. This functionality will not be live on July 1, 2022, so OFCF will work with councils to identify an interim solution.

24. **How do we deal with release of information forms? Do we need to change our releases since it sounds like the State will have access to specific youth and family data, and that the desire is for information to go from county to county if a youth/family moves to another county?**

    OFCF has partnered with the Center of Excellence to draft a standardized Release of Information (ROI) that councils can opt to use. If councils have a county-specific ROI, they can opt to add provided language to their form.

    OFCF is interested in providing language identifying that the parent(s)/caregiver(s) acknowledge that they were informed that data entered into the CRM may be viewed for administrative purposes by OFCF staff and to support continuity of care, could be viewed by a youth's future care coordinator if the family moves to another county.

1. **OFCF will be receiving all of the documents from Fidelity and it will take some time to review the records to ensure documents are correctly uploaded into the system. How do councils request documents on closed cases?**

   Once OFCF and OIS have a chance to review the information provided by Fidelity, a process will be developed to make documents on closed cases available to councils.

2. **Will the intake data/form just be needed for youth opened 5/1/22 or after or will all current clients (those active cases which were opened prior to 5/1/22) need to have that data in the CRM?**

   The data conversion/mapping should provide you will all youth and families entered into Fidelity prior to 05/01/2022.

3. **I'm assuming that although we shouldn't enter any data into Fidelity past 4/30/22 that we can still access data in there until 6/30/22? For example: If there is a release of information or CANS in Fidelity and we need to look at it or print it prior to 6/30/22, we would be able to do so, right?**

   Fidelity has shared with us that you will continue to have complete access to Fidelity, including accessing uploaded documents and generating reports, through June 30th, 2022.

4. **Will the CRM be like Fidelity and a county can add new users and address password issues or will this need to go through the State?**

   The system will have an automated process where existing users can reset their passwords. New users will complete a JFS7078 'Code of Responsibility' via the OHID platform and be issued an OHID and password. If a user already has an OHID because they have access to any other state systems which uses an OHID, they will continue to use the same ID. Additional information will be provided in the near future.

5. **Since CANS is not in the new system, how soon will we have access to our current CANS that are entered in Fidelity?**

   Fidelity users will continue to have access to Fidelity and any documents currently stored in Fidelity through June 30th, 2022.

6. **If there are multiple releases in Phase 1, could the Intake form and case notes be prioritized to be available in the first phase?**

This request has been communicated to the development team. More details will be provided in the near future.

7. **Will we be able to do year end reporting from the CRM? We currently use Fidelity for our year end reporting. If we cannot access it after June 30, I'm concerned we will not have access to our information for reporting.**

   OFCF recognizes the burden and frustration that changing systems and ending current access will have on Councils, so OFCF staff will work with Councils to address end of the year reporting.

8. **How soon will we receive the intake form?**

   The fields that will be captured in the CRM version of the Intake Form were provided to FCFCs on April 25, 2022.