COACH ROI CHECKLIST

This document contains a checklist developed for the Family Achievement team to support ROI (release of information) updates related to electronic signature requirements.

Process to Create or Update an ROI

- Coach identifies need to create or update ROI(s)
  - Initial enrollment into NAZ
  - When a new provider needs to be added
  - When an ROI expires
  - When a new member is added to an existing household
  - When a scholar turns 18 and is legally considered an adult

- Coach enters a note in head of household’s record documenting need to update ROI(s)
  - Indicate which providers need to be updated
  - Include names and ID’s of all participants whose ROI(s) are being updated at this time

- Verify head of household has an accurate email on the Demographics/Contact tab
  - Also verify an update email address for any other adult or person(s) over 18 in household who needs an updated ROI

- Log the activity for your conversation with the family on the head of households record

- Ping your Team Manager to request ROI update(s).
  - Your Team Manager will send you another ping to notify you once the update to the ROI(s) has been completed

2123 West Broadway Avenue #100 | Minneapolis, MN 55411 | 612.521.4405
Northside Achievement Zone (NAZ) | Rev 04/2020
Which partners should be on the ROI?

Always include NAZ and appropriate partners based on a participant’s strategies.

Partners to automatically include based on anchor school attendance (SY20/21) are:

- Ascension: Reading Partners and Minnesota Reading Corps
- KIPP: YMCA Beacons, Minnesota Reading Corps
- NSJ: YMCA Beacons, Minnesota Reading Corps
- Mastery: Minnesota Reading Corps

For households living in/moving into UHW housing, the adults should have UHW and PPL on the ROI.

Partners to automatically include based on age:

- Early childhood: Think Small, MPS
- K12: MPS
- Adult: Parents or legal guardians should have the same partners as the scholars in the household.

*Note: scholars do NOT need to match the adults ROIs, but partners on a scholars ROI should also be on the adults.*