



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 and Team Manager will collaboratively identify needed ROIs. Below are common reasons why/when an ROI is needed:
 - Initial enrollment into NAZ
 - When a new provider needs to be added
 - When an ROI expires
 - When a new member/child is added to an existing household
 - When a scholar turns 18 and is legally considered an adult

- Together the Team Manager and Coach will review each household/individual and note generic partners needed on ROI.
 - Coach will pull up names, email addresses and DOB to easily provide them to the Team Manager.
 - Coach will note NAZ Connect that generic ROI is being sent to HOH (including specific partners) once ROI is sent they will contact HOH to request they review and sign DocuSign ASAP.
 - Team Manager will concurrently complete the new/updated ROI in DocuSign and send it to the family.**continue to note ROI spreadsheet as ROIs are sent*
 - If a family would like to see changes in regards to partners, the ROI will be corrected and re-sent for their signature.

- As coaches are talking with families, the coach will remind families to complete the ROI if it has not been completed yet.

- If the DocuSign bounces back for invalid email:
 - The Team Manager will notify the coach to get this information updated ASAP and note in NAZ Link.

- If email addresses are missing:
 - Coach is expected to reach out to the family to collect this information and note profiles in the NAZ Link, and ping their manager when email has been updated on the participants profile.

- Team Manager will update ROIs in NAZ Connect upon receiving approval via DocuSign from the household.

- Team Manager will note the HOH record when ROIs have been updated.



Which partners should be on the ROI?

Always include **NAZ** and appropriate partners based on a participant's eligibility strategies.

Partners to automatically include **based on anchor school attendance (SY21/22)** are:

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

Partners to automatically include **based on age:**

- Early childhood: MPS, Think Small, Way To Grow
- K-5: 21st Century, MPS, PCYC, Reading Partners
- HighSchool: 21st Century, Cookie Cart, MPS,
- Adults: Parents or legal guardians should have the same partners as the scholars in the household.

ExL/OST Partners to automatically include **based on age:**

- Big Brothers Big Sisters (ages 8-13)
- Cookie Cart (ages 15-18)
- Reading Partners (grades K-5)

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

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

- 21st Century (K-12)
- BBBS (Ages 8-13)
- Cookie Cart (ages 15-18)
- MPHA (18+)
- PCYC (K-5)
- TCR (18+)
- Washburn (all ages)
- Way to Grow (Scholars 0 to 8 yrs- *must have 0 to 3 yr old in home to qualify)
- YMCA of the North (K-12)