NAZ Connect Procedure

Connections

➢ Make a Connection
➢ Accept/Decline a Connection
➢ Complete a Connection

Make a Connection

1. Open the person’s record.
2. Go to the Goals/Notes window.

3. Create or find the Goal to which the connection will apply and click Details.
   • Note: Never make a Connection on a goal that has a “**” in the Category.

5. Enter any necessary notes for the recipient of the connection.
6. Click Create Goal Step (defaults to selected).
7. Click on Search Opportunity Providers.

8. Select either **Starts With** or **Contains**.
9. Enter at least a partial name in **Provider Name** textbox.
10. Click **Search**.

11. Check the box next to the appropriate provider.
12. Click **Select**...

13. **Referral To** - Select the name of the recipient of the Connection (i.e. Connector or Navigator).
14. Make sure **Create Goal Step** is selected.
15. Click **Send/Save**.

16. Verify the connection now appears under the Steps in the goal.

An email with the details of this Connection has now been sent to the selected recipient (Step 13). You can follow the status of this Connection by clicking on **Home -> Referrals** (in Participant section).

**Accept/Decline a Connection** (return to top)

1. On the **Home** page, the Connection should appear under **Incoming Notifications**.
2. Click on the Connection to open it on the Referrals window (or click **Referrals** to view all).
3. With Connection highlighted, add a **Status Note**.
4. Select **Accept** (indicates is in process) or **Decline**.
5. To see the Goal to which the Connection applies, make sure the Connection is highlighted, then click on **Goals/Notes**.
6. **Reset** will show the default of all OPEN connections sent or received by the current user.

**Complete a Connection** *(return to top)*

1. Go to Home and click on **Referrals** under Participant.
2. Find and select the Connection.
3. In **Completion Status**, select the appropriate option (choose “**Showed Up**” to indicate this connection has been approved; choose “**Did Not Qualify**” if it has been denied).
4. Verify **Mark Complete** is selected.
5. Click **Update**.