NAZ Connect Procedure

ROI (Release of Information)

- Create an ROI
- Add Provider to Existing ROI

Create an ROI

1. To create or update an ROI, the **Head of Household MUST BE PRESENT**!
2. Open the person’s record and verify you are on the **Youth/Family Profile** view.
3. Go to the **SetUp Info** tab.
4. Click on **Client ROI**.

5. Select the partners that will be included in the ROI for this person.
6. Click **Continue to Specific ROI**.
7. The ROI will start out all **Red**. This indicates nothing has yet been shared with any of the partners.
8. Click on **Change/Update**.

9. To update the overall ROI for a provider, click on the provider’s name.
10. Select from the list of options:
   - **Green** - Disclose/Receive – opens full sharing to and from the selected provider
   - **Yellow** - Receive – the selected provider will receive information from the other providers with a green in that column
   - **Red** - None – no sharing with the selected provider
11. To update the permissions for a specific column (tab), click on the circle.
12. Select the desired option.

13. The permissions for that tab only will now reflect the change.
14. Repeat this process for all tabs as necessary.

15. Click **Print**.

16. The following window will pop up (if it doesn’t make sure your pop-up blocker is allowing pop-ups for this page). **Print this page and have the Head of Household complete and sign it!**
17. Close the consent form window.
18. Click **Save**.

19. Re-enter the **Youth/Family's initials**.
20. Enter the **NAZ Connector's initials**.
21. Click **Continue**.

22. Click **Done**.
Add Provider to Existing ROI  
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1. Open ROI using Steps 1-3 under **Create an ROI**.
2. Click **Change/Update**.

![ROI screenshot]

3. Select the provider from the drop down.
4. Click **Add Provider**.

5. Change the permissions as needed for this provider:
   - To change all, click on the provider name to the left and select the permissions.
   - To change one-by-one, click on the dots in the desired columns.

![Permission change interface]

6. Repeat steps 3-5 for each new provider.
7. Click **Print**.
8. **Print the consent form and have the Head of Household complete and sign it.**
9. Close the consent form window.
10. Click **Save**.

![Consent form image]

11. Enter the **Youth/Family’s Initials**.
12. Enter the **NAZ Connector’s Initials**.
13. Click **Continue**.

![Consent form signature page]

14. Click **Done**.