NAZ Connect Procedure

View Resources

1. Open the person’s record and go to the Goals/Notes window.
2. Click on View Resources under the Notes section.

Add a Resource

1. On the Resources window, Click Add Resources.
2. Choose the resource **Category**.
3. Select the **Resource**.
4. Enter the **Qty** (number of this item to be given).
5. Verify the **Value** is correct; if not, update the amount.
   ➢ Note: This value is for each individual item, not the total of all items being given. The total will be calculated separately.
6. Select the appropriate **Status**.
7. **Private** – check ONLY if this resource is truly private and should be visible to the current provider only.
8. To include more than one resource, click **Add Resource to List**, then add another resource. Repeat this process until all necessary resources have been added.
9. When done, click **Save**.
10. A note will appear in the **Notes** section indicating the total amount in resources given. If multiple resources were given in one transaction (see Step 8), the total will appear in a single note. If you require separate notes for each, do not use **Add Resource to List**, but click **Save** after each resource entry.