Strategy Participation is a way to understand how a participant relates and interacts with various support teams within the NAZ ecosystem. To view a participant’s relationship with staff in the NAZ ecosystem, access a participant record by doing a Quick Search or by the Advanced Participant Search areas.

** Some strategies are managed directly within this widget and others are managed indirectly based on data points located elsewhere within the participant’s Profile.

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DIRECT MANAGEMENT
(Applicable for Coaching Recruitment, Family Coaching, and Scholar Coaching Strategies.)
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Directly adding a participant into a Strategy

1. Within any area of the participant’s record, there is a widget in the header with the words “Strategy Participation”. Click on the edit button.

2. A pop-up window opens with a list of all active Strategies available for membership. Click on the edit button in the row for the Strategy in which you would like to add the participant.

3. Upon clicking the “Edit” button, the participant will be added to that strategy with a start date of the today’s date -- adjust the date accordingly. Click the “Update” icon for the changes to be saved for that Strategy.

4. Click the “Save” button for all changes to be applied.
Directly removing a participant from a Strategy

1. Click on the edit button of the Strategy Participation widget within the participant record.

2. Click on the edit button in the row for the Strategy from which you would like to remove the participant.

3. Put in the appropriate end date, hit the “update” button, then click Save.

INDIRECT MANAGEMENT
(Applicable for Anchor Early Childhood, Expanded Learning, Anchor School, Career/Finance, and Housing Strategies)

Indirectly adding a participant into a Strategy
A participant will automatically be enrolled in the applicable strategies just by entering the information in the following areas of the participant profile.

- **Anchor Early Childhood** --
  - A participant is enrolled by adding an instance in the **EC Placement** subtab. The placement should be **current** at a placement listed in the **NAZ Early Childhood Anchor Partner** field with a **start date** specified.

- **Expanded Learning** --
  - A participant is enrolled by adding an instance in the **ExL Placement** subtab. The placement should be in the **current session** at a program listed in the **ExL Enrollment** field with a **start date** specified.

- **Anchor School** --
  - A participant is enrolled by adding an instance in the **School Enrollment** subtab. The enrollment should be in the **current school year** at a school listed in the **NAZ Anchor School** field with a **start date** specified.

Indirectly removing a participant from a Strategy

- **Anchor Early Childhood** --
  - A participant’s strategy ends by updating an instance in the **EC Placement** subtab. The placement should update **Current=no** and add an **end date** for a placement listed in the **NAZ Early Childhood Anchor Partner** field.

- **Expanded Learning** --
  - A participant’s strategy ends by updating an instance in the **ExL Enrollment** subtab. The placement should be in the **current session, withdrawn=Yes** with an **end date** specified at a program listed in the **ExL Enrollment** field. Similarly, the enrollment will end upon transition into the next session if they had an enrollment in the previous session and do not have an enrollment in the current session.

- **Anchor School** --
  - A participant’s strategy ends by updating an instance in the **School Enrollment** subtab. The enrollment should be in the **current session, withdrawn=Yes** with an **end date** specified at the NAZ Anchor School listed in the **NAZ Anchor School** field. Similarly, the enrollment will end upon transition into the next school year if they attended an anchor school in the previous school year but no longer attend an anchor school in the current school year.

Historical memberships of a strategy

1. Navigate to the Strategy Participation’s widget and click the “Edit” icon to view the pop-up window.
2. Find the Strategy you would like to view the history for and click on the “History” icon. The pop-up will navigate to a historical list of memberships within the chosen Strategy.

3. To edit the historical membership, click the edit button under the “Action” header. Adjust the date(s) accordingly. Click on the “Update” icon for the changes to be applied.

Viewing the Participant’s details of a Strategy Participation

Sometimes it is helpful to know the details of the strategy participation such as:

- Where is the scholar participating in an Expanded Learning opportunity?
- Which specialist is the participant working with?

It is possible to answer these questions by easily navigating to the subtab that houses this information within NAZ Connect.

1. Navigate to the Strategy Participation’s widget and click the “Edit” icon to view the pop-up window.
2. Find the Strategy you would like to view the details for and click on the “Redirect” icon.

3. This will redirect you to the appropriate category that contains more details about the participant’s Strategy Participation. For example, an Expanded Learning strategy participation would redirect to the ExL Placement subtab.

Strategy Participation in the Snapshot area

1. Navigate to the Participant’s Snapshot area by going to Menu → Snapshot
2. The Snapshot area will show all Strategies that the participant is currently engaging within, and will not show historic participation in a strategy.

3. To see all strategies the participant’s household members are currently engaging within, check the box “View Enrollments for Entire Household”