NAZ Connect Procedure

Widgets - Overview

In the NAZ Connect home page, there are four rectangular spaces dedicated to widgets which display information based on the user who is logged into NAZ Connect. These are also called “grids” in the interface. In order to add a widget, you must have at least one open space in one of the four quadrants.

Below is a description of the information you can expect to see in each of the widgets. Feel free to customize based on what supports your workflow the most.

Coming due

Items needing attention within the next [X] weeks or anytime in the past. This includes expired ROIs, Goal steps with “follow up” dates approaching.

Goal Visit Activity Stream

This shows the most recent updates to a goal for participants for the NAZ Connect user listed as an active team member on the participant’s Team Member subtab and where the user was the creator of the note or the visit.

Incoming notifications

All incoming and outstanding (incomplete) connections (aka “referrals”) sent by another user to the NAZ Connect user, regardless of whether the user is listed as an active team member on the participant’s Team Member subtab. This is only helpful if you receive referrals through the system.

Latest attendance of individuals

Most recent attendance (only the 1st most recent attendance date) of any individual in an open class who also has the NAZ Connect user listed as an active team member on the participant’s Team Member subtab. The information displays is not time-bound by date of attendance, but once a class is finalized the attendance will no longer show.

My participants

Lists all participants who are actively participating in the Family Coaching strategy whose record lists the NAZ Connect user as active in the Team Member subtab for any role (e.g. Family Achievement Coach, Family Support Specialist, etc.).
Notes visit activity stream
This shows the most recently logged visit and the most recent note date for participants actively participating in the Family Coaching strategy who have the logged-in user listed as an active team member and where the logged-in user was the creator of the note or the visit. This is very similar to the “Recent participant activity”.

Recent participant activity
This shows the most recently logged visit and the most recent note date for participants actively participating in the Family Coaching strategy who have the logged-in user listed as an active team member and where the logged-in user was the creator of the note or the visit. This is very similar to the “Notes visit activity stream”.

Upcoming birthdays
Birthdays coming up within the next 14 days for the NAZ Connect user who is also listed as active on the participant’s Team Member subtab.