



PRIORITY ACTION: DATA CLEAN UP

The calendar year end is approaching and this requires data review and clean-up, if necessary. **All data should be cleaned & complete by December 22, 2021**

Data Points for Review & Clean-Up

- Achievement Planning, Goals & Action Items
 - Review to ensure all goals & action items are up-to-date, focusing particularly on goals & action items that have been open for 100+ days.
- Conferences
 - Review for existence & accuracy.
- EC/School Placements
 - Review & confirm all scholars have an existing, accurate school placement.
- Family Coaching and Coaching Recruitment Program Engagements
 - Review roster to make sure all participants engaged in Family Coaching & Coaching Recruitment are accounted for.
- Demographic Data
 - Review & update address information for all NAZ families. (i.e. changing the address if the family has moved, checking to make sure the address includes a unit number if the family lives in an apartment, checking the “Receive mail at this address?” box if a family receives mail at their home.)
 - Enter all missing demographic data for each NAZ participant.
- ROI
 - Review & request ROI updates for all participants with an expired ROI or outdated ROI missing a provider.

NAZ Link Process

1. Coach reviews the following reports/documents: In- Process Goals & Action Items, PA: Conferences, PA: Missing EC/School Placements 21/22, EC/School Placements Needing Remediation, Coach Roster, Demographic Clean Up, Address Update, Upcoming & Expired ROI, & ExL ROI Updates.
2. Coach connects with Family to ensure all data points are up-to-date & accurate.
3. If needed, Coach works with Manager(s) to get HOH & scholar(s) ROI updated.
4. Coach updates all out of date & missing data in Salesforce.
5. Coach [logs time](#) spent talking to family & updating/cleaning their data.



Reports & Related Links

- Achievement Planning, Goals & Action Items
 - [In Process Goals & Action Items](#) (# Days in Process listed in the final column)
- Conferences
 - [PA: Conferences](#)
- EC/School Placements
 - [PA: Missing EC/School Placements 21/22](#)
 - [EC/School Placements Needing Remediation](#)
 - [PA: Existing EC/School Placements 21/22](#)
- Family Coaching & Coaching Recruitment Program Engagements
 - [Coach Roster](#)
- Demographic Data
 - [PA: Demographic Clean Up](#)
 - [PA: Address Update](#)
- ROI
 - [Upcoming & Expired ROIs](#)
 - [ExL ROI Updates](#)