NAZ Connect Resources

ROI Overview

NAZ Connect is an online achievement-planning and data collection system that supports our “high-touch” approach with families.

The database serves three critical functions:

1. Drives achievement and supports family partnerships
2. Supports coordination across the Northside Achievement Zone (NAZ) system of partner organizations
3. Tracks both family and program data and contributes to program evaluation and improvement

The NAZ Connect Release of Information (ROI) is an electronic form that authorizes NAZ staff and the specified organizations to share among themselves written and verbal information about a participant.

At NAZ, we believe that building strong families and strong neighborhoods takes a team effort. We recommend all relevant categories are shared with the organizations/programs that families engage with in order to best build a team of collaborative partners.

Here are a couple of examples:

- By sharing the Demographic category, it makes it easy for partners to view contact information. This means less paperwork.
- By sharing the education category (K12), a Family Achievement Coach can coordinate with an OST partner staff to support the scholar’s academic success.

If a participant wishes to restrict any category and/or limit the sharing for any category, this can be done at any time.

How often will the ROI need to be updated?

At a minimum, ROIs expire annually. Additionally, updates to the ROI can happen at various points in time depending on the goals that a family member sets. For example, if a scholar enrolls in a NAZ OST program, the ROI will be updated to include that program.
What are an individual’s rights related to the ROI?

All individuals have the right to designate certain items of data as ‘private’ in NAZ Connect, which restricts the sharing of data with other partner organizations. Please note that all staff within the organization affiliated with the user entering data will still see the ‘private’ data. If the data is marked private or an individual refuses to sign an ROI, this may result in limitations on the types of support that can be offered. All individuals have the right to request to view the information maintained regarding them and their dependents at any time. See additional information in the NAZ Connect ROI language.

What information is shared regardless of ROI existence?

NAZ Connect shares basic identifiable information with NAZ partner organizations to prevent duplication of participant records. This includes the following information:

- Name
- Date of birth
- Basic household structure (caregiver/dependent)

How does an ROI become active/valid?

The ROI becomes active in facilitating collaborative wraparound support with a few steps.

1. A hard copy of the ROI has been generated based on specifications desired by the family or on the generic specification set to facilitate collaboration among organizations.
2. A hard copy of the ROI has been signed by the family. See note about who is able to sign on behalf of a minor.
3. The specifications listed on the signed hard copy ROI have been accurately entered into the NAZ Connect system. Specifications include: organizations listed, categories of information to be shared, and expiration date.

*Note for staff: do not save the ROI in the system until after a hard copy has been signed. Generate the PDF of the ROI, print, and cancel to avoid saving ROI specifications that have not yet received a valid signature.*

Who is allowed to sign the ROI on behalf of a minor?

The parent or other legal guardian is able to sign the ROI on behalf of a minor. Unfortunately, we cannot knowingly accept a signed ROI as valid when it is signed by an aunt/uncle, family friend, or other adult that is knowingly not designated as a parent or legal guardian of the scholar.

Is an ROI valid if there are multiple names listed on one ROI document?

All individual participants are required to have their own distinct ROI. To avoid confusion, all ROIs should have only one name listed on the document.
What if there are multiple ROIs that have been signed by the family with different sharing specifications?

Sometimes there may be more than one ROI that has been signed by the family based on the different ways the family interacts with NAZ collaborative partners. For instance, the family may be engaging with a Family Achievement Coach while at the same time enrolling a scholar into a NAZ after school program. This could result in a signed ROI that is customized, and another signed ROI that is generic based on the ROI included in partner organization enrollment paperwork. Unfortunately the system and processes in place at NAZ only allow for one ROI to be active at a time. In general, we follow these principles to determine which ROI is most appropriate to be considered the active ROI, and in priority order:

1. Intention and family agency: The ROI that had the most intentional conversation and family agency in deciding which organizations are listed on the ROI and which categories of information will be shared receives priority over other signed ROIs. This means that valid ROIs signed while in relationship with a Family Achievement Coach will always be prioritized over generic ROIs signed while enrolling with a partner organization.

2. Most recent: The ROI that has been signed most recently receives priority over other signed ROIs.

Once it has been determined which ROI to prioritize as active, the competing ROI that has never been entered into the system can be shredded. Please see the question around retention guidelines for proper storage of all current and historical ROIs that have been entered into the system.

How is the active ROI stored and secured? For how long should historical ROIs be retained?

Once an ROI has been signed and the specifications have been entered into the NAZ Connect system, the original signed document must be kept in a locked file cabinet. Proper best practices to maintain the security of the documents must be enforced. For co-located NAZ staff who are not aware of an option for secure storage of participant ROIs, please consult with your manager to address this concern.

The retention period of historical ROIs that have been entered into the system (meaning, at one point, this ROI was “active” and facilitated data sharing among organizations) should align with the NAZ collaborative partner organization’s current retention policies. NAZ as an organization is currently in the process of establishing retention guidelines organization-wide and at this time, NAZ Family Achievement Program staff should retain all historical ROIs until further notice.
What types of information may be in each category in a NAZ Connect profile?

<table>
<thead>
<tr>
<th>ROI Category</th>
<th>Age Group</th>
<th>Example of Information Collected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demographics</td>
<td>All</td>
<td>Team members, race, gender, emergency contact info, etc.</td>
</tr>
<tr>
<td>Setup Info</td>
<td>All</td>
<td>Name and original record setup information</td>
</tr>
<tr>
<td>Enrollment/Engagement</td>
<td>All</td>
<td>Summary profile info, including basic info collected upon enrollment</td>
</tr>
<tr>
<td>Ed-Early Childhood</td>
<td>All scholars</td>
<td>Early childhood center enrollment, early childhood screening results and progress</td>
</tr>
<tr>
<td>Ed-k12</td>
<td>All scholars</td>
<td>School enrollment, academic history, attendance, academic screening data, high school completion</td>
</tr>
<tr>
<td>Ed-Expanded Learning</td>
<td>All scholars</td>
<td>After-school and summer program participation</td>
</tr>
<tr>
<td>Ed-College</td>
<td>All</td>
<td>College enrollment status</td>
</tr>
<tr>
<td>Career</td>
<td>Adults</td>
<td>Employment as a result of career support (building a resume, find a training), career training</td>
</tr>
<tr>
<td>Finance</td>
<td>Adults</td>
<td>Income, expenses, etc. used for finance support (creating a household budget, improving credit), financial training</td>
</tr>
<tr>
<td>Housing</td>
<td>Adults</td>
<td>Housing opportunity eligibility, etc. used for housing support (getting into shelter, buying a home)</td>
</tr>
<tr>
<td>Behavioral Health</td>
<td>All</td>
<td>Behavioral health discussion topics used for behavioral health support (finding appropriate care)</td>
</tr>
<tr>
<td>Health</td>
<td>All</td>
<td>Basic health information</td>
</tr>
<tr>
<td>Leader/Participation</td>
<td>Adults</td>
<td>Tracking Family Academy class completion, participation at specific events and capturing leadership roles in the community and with NAZ</td>
</tr>
</tbody>
</table>