Digital Navigator (DN) Process Outline

1. **Initial Client Intake**
    a. **Purpose:** collect contact information and information about client's goals
    b. **When and how might this take place?**
        i. Completed online by a community member as a way to request an appointment
        ii. Completed as a referral by partner organization
        iii. Complete by DN in conversation with a new client
    c. **Forms:**
        i. Intake Form
        ii. Referral Form - some programs modify intake forms to collect different information in the case of a referral.

2. **Assess Goals, Needs, and Existing Assets and Experience**
    a. **Purpose:** learn about a client's existing skills, connectivity, and device access and identify what is needed to move toward client goals
    b. **When and how might this take place?**
        i. During initial conversations with a community member, DN will learn about the client's existing skills, access to devices, and connectivity, using informal and formal assessment tools as needed.
        ii. During subsequent meetings, DN will discuss client's satisfaction with previous solutions and may use formal and informal assessments to measure client's progress.
        iii. During subsequent meetings, DN will discuss if client goals have evolved.
    c. **Forms**
        i. Session Summary (formerly exit survey)
    d. **Resources:**
        i. Skills Assessment form (informal)
        ii. Northstar Digital Literacy Assessment (formal)

3. **Evaluate and Discuss Solutions**
    a. **Purpose:** review available resources and learn about client's preferences and priorities
    b. **When and how might this take place?**
        i. Once DN understands the client's goals and existing skills, connectivity, and device access, they discuss options for gaining skills, connectivity, and device access. DN will be responsive to client's preferences.

        ii. In subsequent meetings, DN will also discuss what did and did not work for the client with previously selected solutions. DN will discuss alternative or progressive solutions as needed.
    c. **Form:**
        i. [Session Summary (formerly exit survey)]

4. **Refer to Relevant Resources**
    a. **Purpose:** provide resources and a plan to help client reach goals
    b. **When and who might this take place?**
        i. Once DN and client agree on a plan, DN will refer the client to resources relevant to their goals and needs. The resources might be accessed and used during the meeting or outside of the meeting. DN may refer the client to receive direct support from the DN, such as individual digital skills coaching.
    c. **Form:**
        i. Session Summary (formerly exit survey)
    d. **Resources:**
        i. Free & Low-Cost Internet Plans webpage
        ii. Digital Skills Curriculum blog post
        iii. Digitunity - AFTRR map - find your local device refurbisher

5. **Check-in and Evaluate Progress**
    a. **Purpose:** determine if goals have been met or if additional meetings are required
    b. **When and where might this take place?**
        i. DN will check-in with the client, either at a subsequent scheduled meeting or by other contact methods, to determine if the client has achieved their goals or would like more support from the DN. If more support is needed, return to step 2. If not, continue to step 6.
    c. **Form:**
        i. Session Summary (formerly exit survey)

6. **Client Exit**
    a. **Purpose:** collect data on status of stated goals, satisfaction of client, program feedback, and impact stories and to wrap-up relationship
    b. **When and where might this take place?**
        i. When DN and client decide they do not need to meet again in the short term, the survey might be provided on paper, by email, or via a call from the DN's supervisor.
    c. **Form:**
        i. Follow-up survey