This checklist is meant to aid Navigators in their Client professional relationships and used in conjunction with the Navigator / Client Expectation Guide. It’s recommended that this checklist be copy/pasted into your Client’s individual contact record in PRISM (you must create this in your account). It can also be printed out or used however best suits you.

*Note: Links can be found within the PRISM Navigator course, on the pgyb.org website, and will be sent out periodically via email. We are working to condense our platforms.*

*\*Contact the PGYB staff or simply email* *navigator@pgyb.org* *for any questions*

**Navigator General Checklist**

* Complete Navigator Certification Course (including SAVE training)
* Verify PRISM access
* Verify Unite Us access (will be granted upon course completion)
* Verify Resource Spoke List access (Google Sheet that will be shared upon completion of training)
* Verify LinkedIn “Navigator Group” access (if available)
* Familiarize yourself with the Resource Spoke List (Google Sheet)
* Familiarize yourself with Unite Us resources (for both in-network and out-of-network referrals)
* Contact PGYB staff or fellow Navigators for ANY questions, as well as with Client assistance
* \*All links available here: [Navigators - Project Got Your Back](https://projectgotyourback.org/navigators/)

**New Client Checklist (Required)**

* Contact your Client within 72 hours of pairing (the sooner the better)
* Meet with your Client one-on-one/in -person, if applicable
* Ask your Client if they have taken their 2 assessments in PRISM (WHO-5 and Social Determinants of Health)
* When they have taken their assessments, explain the value of sharing their results with you (this is highly optional for the Client – if they do not want to share, do not force the issue)
* Get to really know your Client – what they need, what they want, how you can help, etc. based on a hierarchy of needs priority. (Health, housing, employment, transportation, and fitness)
* Help your Client! This is the single most important part and can take many shapes
	+ Use your resources provided through PGYB
	+ Use your personal resources / experience
	+ Help them uncover benefits and resources they didn’t know they had
* Maintain appropriate contact with your Client
	+ Recommended once-per-week for the first month, once-per-month after, minimum
* Make referrals in Unite Us
	+ You can make in-network referrals directly through Unite Us (preferred)
	+ You can make out-of-network referrals in Unite Us for resources you provided your Client that are not in the database.
* Complete your 12-month professional relationship (or sooner if mutually agreed upon)
	+ Conduct NPS survey in PRISM, verify Client has taken their Final Assessment

**New Client Checklist (Recommended)**

* Create a new contact with your Client inside your PRISM account
	+ Add relevant information, including: original application, assessment results, contact information, discussion topics, etc.
* Review the Resource Spoke List for “quick win” referrals
* Verify if your Client is eligible for the Minnesota Military Appreciation Fund ($500 or more for disabled Minnesota Veterans)
* Follow PGYB on LinkedIn, Facebook, and Twitter
* **If your Client is searching for a job / career:**
	+ Review your Client’s resume, LinkedIn, etc. (not always necessary depending on the Client)
		- Use listed resources to help **(Hoodo**, **Eagle Group, Purepost, Lockleed**, etc.)
		- Use “Companies Who Want to Hire from PGYB” resource in Spoke List
	+ Explore their potential business start-up options (if interested, refer to **Bunker Labs**)
	+ Discuss potential for complementary employment mentorships through **American Corporate Partners and Veterat**i)
* **If your Client is transitioning directly from active or reserve service:**
	+ Determine housing needs (VA Loan and real estate agents available in resources)
	+ Ensure that they have submitted their DD-214 to the **Minnesota Workforce Center (DEED)** and explore what resources are available to you
	+ Ensure that they have contacted their **CVSO** for guidance with VBA Claims Submission
		- Use listed resources to help (Many available in Spoke List and Unite Us)
	+ Help your Client create a “**Transition Action Plan**” according to the specifics of their career direction
* **If your Client is looking for education benefits:**
	+ Explore their potential education options using both Federal and MN State GI Bill
	+ 3-6 months prior to ETS, there are Skillbridge and other fellowships available
* **If your Client needs housing assistance:**
	+ Determine if it is a short-term or long-term need.
		- Use listed resources to help (**MAC-V, The Veteran Villages, Trinity Sober Homes**, etc.)
* **If you Client needs social connection:**
	+ Ensure they are connected with other PGYB members on social media
		- Use listed resources to help (**Warriors Next Adventure, Wake for Warriors, Sheep Dog Impact Assistance, etc**.)