



PA Navigate in Practice: Claiming, Optimizing Program Cards, and Connecting

Community Giving Foundation

August 12, 2026

Community Action Association of Pennsylvania:
Christie Kilmer, Community Engagement Manager



Learning Objectives

- How to Claim a Listing
- Understand how program card features drive visibility and search results
- Learn how to use screener forms as a tool to pre-screen for eligibility and understand client needs
- Understand information flow for referrals and features to enhance communication



What does “Claiming” mean?

- Taking ownership of your program listing(s) on the PA Navigate platform



Benefits of Claiming

- Manage your program listing
- Choose an intake method
- Track and manage referrals
- Collaborate with your team
- Access program analytics





Claiming Your Listing

<https://panavigate.org/claims>

Program Card Basics

- Program Description
 - What is the most important information that an individual needs to know before reaching out?
- Program Tags
 - What is the main need or need(s) that this program addresses?
- Serving Tags
 - What population does this program serve?





Program Card Example

Tagging Importance & Considerations

- Main service tags are the primary way individuals will find your program
 - Categorization
 - User search
- Can use up to 15 tags
- "Other" service tags



Program Card Features & User Filters

Personal Filters

Program Filters

Income Eligibility



Serving Tags



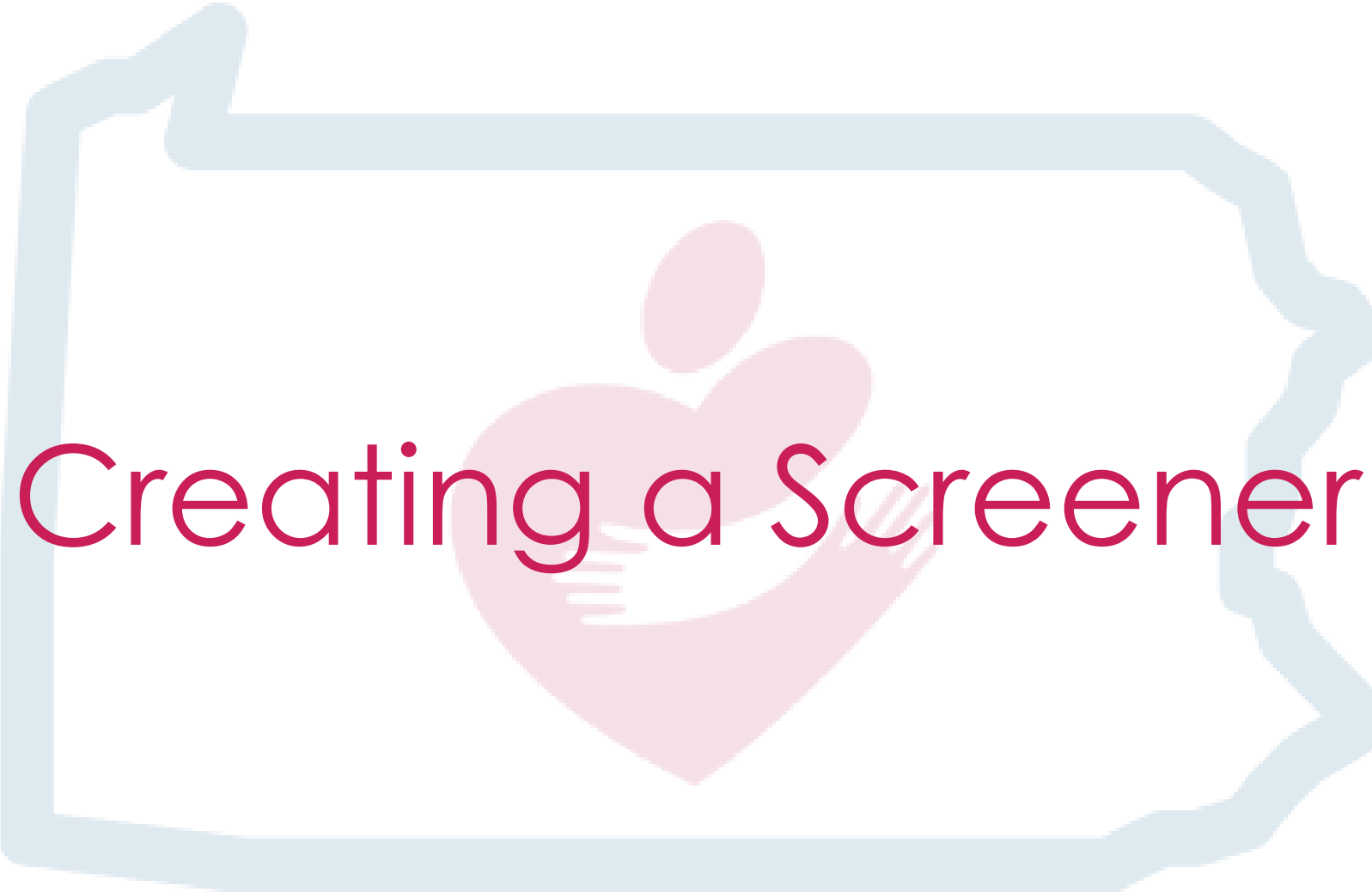
Program Description
Hours of Operation
Eligibility Rules



Purpose of Screeners

- Filter incoming referrals
- Pre-determine eligibility/gather information upfront
- Suggest alternative programs





Creating a Screener

Screeners Customization

↑ How many times have you received care in an emergency room (ER) over the last 12 months? ✕

↓ Question type: Radio

☒ Required ☒ Eligibility Question

Options for this question:

Option *	☐ Not Eligible
0 times	☒ May be eligible
Option *	☒ May be eligible
1 time	
Option *	
2 or more times	



Addressing Ineligibility

You May Not Be Eligible

If someone doesn't fit the requirements you've given us, tell them about some alternate resources with similar services for other populations. This is the page people will see after they submit the form. You can include links in this section, including links to program websites, your publicly shared Aunt Bertha Favorites Folders, or applications for other programs. [Learn how to link here.](#)

Normal  **B** *I* U    

Based on your situation and the information you provided, you may not be eligible for services. We'll still send them your application. Please contact the program if you believe you still may be eligible and you're getting this message in error.





Updating Inbound Referrals

Inbound Referrals-Adding Notes

TRAINING - Food Pantry

by Bertha Training

Status:

... Not updated

ADD NOTE

Type your note here...

☐ Make note visible to people outside your organization who can see the referral

SAVE

2/23/22	Status set to 'not updated' Rachel Navigator
2/23/22	Referred by Rachel N (Bertha Community Foundation) Comment: Mary has gluten intolerance



Outbound Referrals-Adding Comments

Their Phone Number

Their Language

Best way to reach them*

☒ Email

We'll send them an email with the next steps to contact this program.

☐ Text message

☐ Phone call

☐ Don't reach out

 **Comment** This comment is visible to you, your team, the agency, and person you're helping.

Confirm Consent *

☒ I have appropriate consent from the person or their guardian (if under 18) to:

- Send their contact info and additional info through this system to this agency, and
- Send them info **about this program** through the Internal Training platform (including any responses sent to them by the program).

 SEND



Key Takeaways

- Benefits to claiming program listings
- Program tagging is key for optimizing seeker/program match
- Screeners are helpful tools for maximizing referral quality
- Utilizing notes & comments can be helpful tools for referral context



Thank you!



Christie Kilmer

Community Engagement Manager

christie@thecaap.org