CRITERIA FOR INSTALLATION OF THE 211 LA COUNTY TAXONOMY IN AN I&R SOFTWARE PACKAGE

The *211 LA County Taxonomy* is the classification system that has been identified by the *AIRS Standards for Professional Information and Referral* as the international standard for indexing and accessing human services resource databases. It is a hierarchical system that contains more than 9,200 fully-defined terms that cover the complete range of human services. U.S. English and Canadian English versions of the *Taxonomy* are available and can be accessed on the Taxonomy website at www.211taxonomy.org.

The *Taxonomy* is an intellectual property copyrighted by 211 LA County and available only to licensed subscribers.

The effectiveness of the *Taxonomy* as a tool for indexing and searching resource databases can be enhanced or limited by how an I&R software package integrates the *Taxonomy* into its programming and presents it to the user.

This document describes how the *Taxonomy* is best incorporated into an I&R software package, the interfaces that are required for different users and the specific functionality that needs to be available.

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TAXONOMY USERS

Taxonomy-related functionality in a software package must reflect the needs of:

- Resource specialists who maintain and index human services databases.

- System Administrators (usually one or more of the resource specialists) who set the software's parameters, options and user permissions.

- I&R specialists and other professional users who conduct searches and retrieve resources when they provide information and referral services to the public.

- Members of the general public who search for information in resource databases that have been made available for community use.

- I&R agency administrators, government and community planners and others who need to retrieve, analyze and create reports that describe the structure of community services and the needs of individuals, families and communities.

Although many functions are required by all users, some are only relevant to specific groups of users who have distinct requirements.

OVERALL STRUCTURE

The I&R software package should:

1. Be covered by a current vendor license so the Taxonomy can be legally loaded into their software. Software vendors must have a vendor license if they incorporate the Taxonomy in their software package and sell it as a combined product, host a Web version of an I&R's database that includes the Taxonomy, distribute a demo of their software that incorporates the Taxonomy or perform Taxonomy updates for their users (as opposed to providing a utility that allows the users to download the file from the website and incorporate updates themselves).

2. Allow a system administrator to assign rights and authorizations that enable individuals and groups to access the different modules within the software and make changes that affect use of the *Taxonomy* within the application.

3. Store, display and make available for use all levels of the *Taxonomy's* hierarchy.

4. Ensure that all the fields that are contained within a *Taxonomy* record are available to users and that system administrators have the ability to enable/disable the display of each field according to the needs of their own staff/community (for

example, all fields might be enabled for all resource specialists but I&R specialists and the public may not need to see the Code or Comments fields):

Field Structure of a Taxonomy Record
Term Name (also known as Preferred Term)
Code
Definition
Date Created
Date Changed
Use References (Searchable synonyms for Term names)
See Also References (Terms that are related to the selected term and suggest alternative options)
External Classification Terms
Related Concepts and their Codes (A set of concepts like Pregnancy, Child Abuse and Long Term Care that can be attached to *Taxonomy* terms from different parts of the hierarchy. The purpose of the related concepts is to provide different views into the *Taxonomy*. Related terms function like 'mini-directories' or sub-sets, allowing users to quickly identify a cluster of services identified with a particular target population or problem/need. Each Related Concept is identified by a code that is distinct from the Taxonomy code – for example, the code for the Related Concept of Disaster Services is DI-800)
Facet (A descriptor that explains the type or nature of each *Taxonomy* term. Facets include Service, Target, Organization/Facility Type, Modality/Delivery Format and Named Program)
Comments (Official suggestions for the use of a particular term)
Bibliographic References

5. Provide the option to include or exclude the display of *Taxonomy* terms within database records. For example, when sending a database record to an agency for updating, some I&R services prefer not to reveal the *Taxonomy* terms used within an agency's profile.

6. Allow the general public and professional human services staff from other agencies to search the resource database online in a variety of ways using Taxonomy terms (in addition to other searching criteria).

7. Provide documentation/help information within the software describing how users can handle *Taxonomy* functions and effectively search the database.

8. Ensure that any changes made to the architectural framework of the *Taxonomy* (for example, the introduction of a new field in a *Taxonomy* record) become available to all current users within a reasonable timeframe following notification from 211 LA County that the change has been implemented on the www.211taxonomy.org website and is now the basis for future *Taxonomy* downloads. It is expected that a plan for any such changes will be announced and widely disseminated by 211 LA County several months before final implementation. Vendors that defer implementation of structural changes more than 9 months from the release date shall be out of compliance with this provision.

CUSTOMIZING

The I&R software package should:

9. Allow authorized users to create a customized version of the *Taxonomy* for their own agency by deactivating terms they do not wish to use, by allowing both active and deactivated terms and their corresponding definitions to be viewed and allowing for terms to be re-activated if needed later.

10. Allow authorized users to define Terms according to one of three classifications:

    *   Active terms (also known as 'approved' or 'available' terms) – These are terms that have either been used to index programs or have been pre-approved for that purpose.
    *   Used terms – These are terms that have actually been used to index services in the resource database. By definition, all used terms are also active terms.
    *   Inactive terms– These are terms that have been manually deactivated and consequently cannot be used to index programs (unless the resource manager/specialist re-activates a term to make it available). However, for hierarchical displays to be meaningful and to enable searches to function better, it is sometimes necessary for some inactive terms to be displayed, although most may be hidden unless specifically called up.

Basically, higher level terms, though not approved for use, must still be visible in hierarchical displays in order to preserve the tree. Inactive terms are always hidden in word searches/alphabetical displays

The diagram below illustrates the relationship between Active terms (**A**), Used terms (**U**), and Inactive terms (**I**) including Inactive terms that are displayed **(D)** and those that are hidden **(H)**.

(2nd level) Food   **ID**
      (3rd level) Community Wide Food Storage Facilities   **IH**
      (3rd level) Emergency Food   **ID**
            (4th level) Brown Bag Programs   **A**   **U**
            (4th level) Food Lines   **A**   **U**
            (4th level) Food Pantries   **A**   **U**
                  (5th level) Occasional Emergency Food Assistance   **IH**
                  (5th level) Ongoing Emergency Food Assistance   **IH**
            (4th level) Food Vouchers   **A**

In this scenario, the local resource database manager has decided that the terms Brown Bag Programs, Food Lines, Food Pantries, and Food Vouchers should all be available for indexing purposes and that the terms Community Wide Food Storage Facilities, Emergency Food, Occasional Emergency Food Assistance, and Ongoing Emergency Food Assistance should be inactive and not available for indexing. While three of the available terms have already been used to index resources, the Food Vouchers term hasn't yet been used—but it has been approved for use when the opportunity arises to use it.

The 2nd level term Food is also Inactive but needs to be displayed for the structure to make sense in hierarchical views with the same logic requiring the display of the 3rd level term Emergency Food. However, the two 5th level terms do not need to be displayed (i.e. they can be hidden) as can the 3rd level term Community Wide Storage Facilities as there are no active terms below that branch.

11. In order to facilitate searching of the database by I&R specialists and the public, allow resource specialists/system administrators to designate inactive lower level terms and their use references to "roll up" to a higher level used term.

For example, if a database has been customized for indexing so that the 3rd level term Emergency Food is active and all the terms below it are inactive, then the resource specialist must be able to ensure that if a user searches Food Pantries or Brown Bag Programs, all records indexed using Emergency Food will be retrieved.

(3rd level) Emergency Food   **Active   Used**
        (4th level) Brown Bag Programs
        (4th level) Food Lines
        (4th level) Food Pantries
           (5th level) Occasional Emergency Food Assistance
           (5th level) Ongoing Emergency Food Assistance
        (4th level) Food Vouchers

12. Allow resource specialists to view the status of all terms in the *Taxonomy* with respect to whether they are available, used or inactive and to be able to change that designation. This can be achieved by using different colors or markings (e.g. "A", "U" or "I") within term displays to denote their status and/or for resource specialists to be able to expand searches to include all inactive terms or toggle to a more complete view.

13. Allow resource specialists to print a hierarchical outline of active and/or used terms or other *Taxonomy* reports for in-house reference purposes.

14. Allow resource specialists to manually add or amend *Taxonomy* terms between downloads. This allows for the addition of important new terms, use references or definitions that have been officially released between local update cycles. In this situation, the added or amended term is replaced at the time of the next automatic *Taxonomy* update.

15. Allow resource specialists to generate their own Related Concepts lists of *Taxonomy* terms.

16. Allow resource specialists to create "local" terms that may not be relevant to the national Taxonomy. In order to ensure that customized terms are never automatically replaced during updates, they should be developed using an unused two-letter code that does not conflict with the existing 11 main categories of the *Taxonomy* (the designation ZZ – such as ZZ-180 – is recommended as that will never be used within the Taxonomy itself).

17. Allow resource specialists to create and name customized or "user defined" searches that incorporate a number of *Taxonomy* terms, including terms from different branches of the *Taxonomy*. For example, a customized search for "Food Services" might draw upon a number of terms from within the Food Section in addition to terms such as WIC and Food Stamps that are located in other areas of the Taxonomy.

SEARCHING FOR *TAXONOMY* TERMS

Note that there are two main reasons to search for Taxonomy terms. One involves resource specialists searching in order to select a term for indexing and the other

involves I&R Specialists searching to retrieve a database record indexed by one or more Taxonomy terms. In most situations, the same search functions are required by both sets of users, but some functions may be important for one group but not the other.

The I&R software package should:

18. Include a default search that consists of a word/phrase search of *Taxonomy* Term Names and Use References. This search should be based on character strings at the beginning of words. For example, a search for "dent" retrieves the term Mobile Dental Care and the use reference Dental Surgery (but does not retrieve Residential Camps). Similarly a search for "aging" picks up Area Agencies on Aging but not Managing Editors. However, vendors are encouraged to incorporate more innovative and sensitive search functionalities such as anticipating common phrases (e.g., returning Rent Assistance following a search for Rental Assistance), misspellings or giving contextual prominence to more frequently retrieved terms.

19. Produce a clean match list for a word/phrase search (i.e., not include duplicate Taxonomy terms).

20. Indicate whether the results of any search is a Term Name or a Use Reference. If the result is a Use Reference, the preferred Term Name must also be displayed and available for selection. For example, Pet Services (Use: Domestic Animal Services). Otherwise, the user may be confused about why a particular preferred term name was retrieved. The user must be able to select a Term Name from the list.

21. Ensure that if a search reveals one or more *Taxonomy* terms, the list is displayed in the order of "Term Name" or "Use Reference (Term Name)" in alphabetical order. For resource specialists, the Code should be alongside each Term Name in a separate column. A click on the Code column should rearrange the list so that it is sorted by code; a click on the Name column returns the user to the alphabetical display. The order on each line (or row) should remain Term Name followed by Code.

22. Ensure that, following any search, a user selecting a Term Name is able to access a display that includes Term Name, Definition, See Also References and Related Concepts. For resource specialists, the Code must also be included following the Term Name in addition to the other fields within a *Taxonomy* record.

23. Ensure that searches conducted by I&R specialists and the general public only retrieve *Taxonomy* terms that have been used to index services, or if those exact terms have not been used, any terms in the hierarchy directly above or below them that <u>have</u> been used.

24. Ensure that word searches by I&R specialists and the general public retrieve any of the indexing terms used within a combination (e.g. a target term and a service

term). For example, a search for Youth would bring up the service indexed as "Anger Management * At Risk Youth * Girls". (See Item #36 for more information concerning this feature).

25. When displaying the results of a word search for Taxonomy terms, show the number of terms retrieved and the number of records/instances indexed using each term. For example: Dehydrated Food (4), Food Stamps (1). Terms that have 'zero' instances of use, such as Dehydrated Food (0) should not be included in the results.

26. Ensure that if a Term has been made inactive, See Also References will not point to it.

27. Allow users to retrieve *Taxonomy* terms that are associated with specific Related Concepts. Options include:

   - Offer a Related Concepts search as a separate feature that allows users to display Related Concepts titles (e.g., Disabilities, Disaster Services, Pregnancy, Older Adults), select a title and display associated *Taxonomy* terms; and/or
   - Present the Related Concepts search as a feature of the word search: when users conduct a word search, if any term is associated with a Related Concepts title, the title appears in a display area. Users can review the pick list of terms generated by the search, click on the Related Concepts name and the system will display the full list of terms associated with the list. For example, the user might search on the word "Homeless". The system displays "Homeless Shelter", "Homeless Shelter Pickup Sites" and other terms/use references containing the word "Homeless". The Related Concepts title "Homelessness" would also be displayed. When the user clicks on the latter, all services typically associated with people who are homeless (e.g., "Hairdressing/Nail Care", Shaving Utensils", "Soup Kitchens") would be displayed, not just those containing the word "homeless".

28. Display within *Taxonomy* word search results instances where the searched word is also within a Related Concept. For example, a search for domestic violence, would also show that there is a Related Concept for Domestic Violence which the user could then select.

29. Allow resource specialists to have the option of displaying the full *Taxonomy* hierarchy and to navigate up and down all levels (i.e. a drilldown menu). For example, an initial display may comprise only the 11 main first level terms for each of the categories but clicking on Basic Needs would reveal the 5 second level terms below the first level … clicking on the second level term Food would reveal all of the third, fourth, fifth and sixth level terms.

30. Ensure that users can move from the alphabetical display generated by a word search to the hierarchical (or drilldown) display determined by the codes. This allows users to examine the section and level of a particular term within the hierarchy in order to confirm that they are selecting the correct term, before returning to their original place in the alphabetical display (or else, exploring other options revealed in the hierarchical display).

31. Allow resource specialists to search the *Taxonomy* by code or partial code. (For example, if a user types a "B" in a designated code search box, the system displays all of the basic needs categories; if the user types "BD", the system displays all of the Food categories.)

32. Provide an option for including Inactive terms and their Use References in a word search of the *Taxonomy* by having the display point to the next higher level Active term on the same branch of the *Taxonomy*. This is particularly important when organizations customize in a way that eliminates many lower level terms. For example, if an organization uses "Emergency Food" as its index term, users may become frustrated if they get no results when they type in "Food Pantries". When Inactive terms and their Use References are used as Use References for Active terms, and no higher level term is Active within that branch, display the lower level terms within that branch. When lower level terms are displayed, allow users to select one of these lower level terms as the search term.

33. Allow end users who are using multiple terms in a single search to specify whether the results should display only records with <u>all</u> the terms, or records with <u>any</u> of the terms.

INDEXING

The I&R software package should:

34. Allow resource specialists to select an active *Taxonomy* term from any of the search and retrieval displays to attach to a database record as an indexing term.

35. Allow multiple *Taxonomy* terms to be attached to a record.

36. Allow resource specialists to combine (or link) two or more Taxonomy terms to form a "compound" *Taxonomy* term that represents a single service. This is generally used for linking target terms with service, named program or organization/facility terms but may also be used to link service terms with modality terms. Examples are "Food Pantries * Women" to index a food pantry that targets women, or "Adolescent/Youth Counseling * At-Risk Youth * Girls" to index a counseling program for at-risk girls.

37. Display, during indexing/data entry, the current uses (records with the term attached) of a particular Taxonomy term within the database to encourage consistency in indexing.

UPDATING

The I&R software package should:

38. Provide a utility that allows subscribers to import the XML version of the current Taxonomy downloaded from www.211taxonomy.org and indicates the official version number/date of the last complete update. The version number appears in the first line of the Taxonomy XML as a release date: "releaseDate="2008-01-30T22:56:32Z"; and can be used to ensure that organizations participating in state or provincial database collaboratives are all using the same version of the Taxonomy.

39. Ensure that when importing an updated version of the *Taxonomy*, in the case of one-to-one code changes, the utility automatically finds the old code in the resource database and replaces it with the new one. However, where there are one-to-many changes (i.e. one *Taxonomy* term is being deleted and it has more than one possible replacement), the process must be interactive (i.e., the system must display a term and give the resource specialist a choice of *Taxonomy* terms to replace the one that is being deleted). Preferably, users should have the option to implement a decision globally rather than for every single instance. (While this item focuses on code changes, changes made to other data elements (e.g., term definitions) will be accomplished the next time the Taxonomy is refreshed.)

40. In cases where the user has created customized or modified terms, definitions, see also references, use references, and user-generated related concept lists, these should not be affected by any automated updating of the Taxonomy. This is best accomplished by having separate fields for user modifications.

REPORTING

The I&R software package should:

41. Allow I&R specialists to select or "tag" the indexing terms applied to services in order to record the 'nature' of the referral – or enable this to occur automatically. For example, a referral to a service providing (and indexed as) Occasional Emergency Food Assistance would register that as the 'problem/need' of the inquirer.

42. Allow for the ability to create summary levels of terms in the *Taxonomy* for reporting purposes. For example, a Level 5 term such as "Occasional Emergency

Food Assistance" might have the Level 3 term "Emergency Food" or even the Level 2 term "Food" as its summary level for reports. Searches done at a very specific level could then be reported out more broadly as the report would include all referrals provided by all *Taxonomy* terms below the higher summary level. Organizations should also have the option of associating Taxonomy terms with reporting terms in different Taxonomy branches. For example: WIC and Food Stamps could be reported out as Food.

TAXONOMY GLOSSARY

Active Term: A *Taxonomy* term, with its associated codes, definitions, use and see also references and Related Concepts lists, that is currently available for attaching to services within a database. Active terms may or may not be currently in use. Active terms (and their use references) in use retrieve the attached services when end users select them for searches. Active terms not yet attached to services should be seen by data entry staff but should not be seen by end users.

Alternate/Display Name: An alternative name for a *Taxonomy* term that is used for local display purposes, e.g., "Medi-Cal" rather than "Medicaid" for California. This is set by the resource specialist responsible for configuring the *Taxonomy* in the software package.

Approved for Use: See Active Term.

Archive: A section of the Taxonomy website http://www.211taxonomy.org/subscriber/archive/2007/ storing downloadable versions of the Taxonomy as it existed at the beginning of different months. Useful for organizations belonging to data sharing collaboratives where it is important that each member be using the exact same version of the Taxonomy. This is not possible when downloading the current version as the Taxonomy is updated throughout each month. In data sharing collaboratives, all partners download the designated monthly archive.

Attach a Taxonomy Term: The process of indicating that the selected term and its code are to be used to retrieve a particular service during searches; the process of classifying one or more services.

Available Term: A term that remains active for indexing purposes.

Bibliographic Reference: Provides a list of references which credits sources used in writing *Taxonomy* definitions or structuring *Taxonomy* sections. Example: "200 Years of History", U.S. Customs & Border Protection website, U.S. Department of Homeland Security, http://www.customs.gov/xp/cgov/toolbox/about/history/history.xml.

Comments: Provides official suggestions for use of a particular term, perhaps in contrast to related terms.

Crosswalk: A table that systematically relates the possible equivalent terms of another classification system, such as keywords or UWASIS, to the *Taxonomy*. Crosswalks facilitate the conversion of human service databases to the *Taxonomy* or may even automate this process.

Customized Taxonomy: The view of the *Taxonomy* created by a specific I&R agency as their internal 'working version' of the *Taxonomy*. A customized *Taxonomy* consists of

'Active' terms, some of which will be used and some unused. When an agency first starts using the *Taxonomy*, one of the first activities is to define their customized view (i.e. deciding which terms should be Active with the remainder being Inactive).

Deactivate: The process of flagging a *Taxonomy* term with its associated codes, definitions, use and see also references as unavailable for classifying or searching for services. Deactivating allows later reactivating a code for use without recreating it and all its relationships, as would not be possible if unwanted codes were deleted.

End Users: Those using the software package to locate appropriate services.

External Classification System Codes: Classification systems maintained and used by other organizations whose codes are crosswalked to *Taxonomy* terms. Included are UWASIS (United Way of America Services Identification System), the NTEE (National Taxonomy of Exempt Entities) and the NPC (Nonprofit Classification System).

Facet: A descriptor that explains the type or nature of each *Taxonomy* term. Facets are defined by the *Taxonomy* editor and include Service, Target, Organization/Facility Type, Modality/Delivery Format and Named Program.

Filter: A function on the www.211taxonomy.org website that allows subscribers to create, share and maintain customized versions of the Taxonomy. Some filters are "official" (created by the Taxonomy editor in consultation with experts in a particular area). Others are created by subscribers and may be shared (community filters) or kept as private. Official and community filtered sets are available to all subscribers. They may be used "as is" or copied using the clone function and modified to create a customized version that better reflects the needs of a particular subscriber's community.

Global Search and Replace: A software feature that automates the replacement of old *Taxonomy* codes with new ones in resource database records. This utility looks for occurrences of old *Taxonomy* codes in the user's database, refers to the *Taxonomy* XML file to determine the new code, and replaces the old code with the new code in all occurrences. If a code has been deleted and there is only one replacement, the utility processes the deletion as a code change. If the code has been deleted and has more than one replacement, the utility displays alternative codes and allows the user to make a substitution for each service indexed with the old code until all deleted items have been replaced. The user may also have the option to implement a decision globally rather than for every single instance. The system should display both the *Taxonomy* term name and the *Taxonomy* code during the interactive replacement term selection process. The global search and replace process is generally completed before the updating utility reloads the updated *Taxonomy* from an XML format and reintegrates the customized or modified terms, see also references, use references, user-generated Related Concepts lists and definitions.

Hierarchical Display: Shows the interrelationships among *Taxonomy* terms through use of codes that identify ten major service sections, plus target populations. Each section is

broken down into 6 tiers getting more specific from level to level. Thus for any *Taxonomy* term from any level, the hierarchy can display all parent, sibling and child terms. The codes that determine the hierarchy may or may not be visible to end users.

History File: See Recent Changes.

Human Services: The activities of human services professionals and volunteers which help people to become more self-sufficient, sustain independence, strengthen family relationships, support personal and social development and ensure the well-being of individuals, families, groups and communities. Specific human services include ensuring that people have access to adequate food, shelter, clothing and transportation; financial resources to meet their needs; consumer education and decision support; criminal justice or legal services; education and employment; health and mental health care including substance abuse services; and environmental protection; both routinely and in times of disaster or other emergencies. Human services also facilitate the capabilities of people to care for children or other dependents; ensure that protective services are available to those who are vulnerable; provide for the support of older adults and people with disabilities; offer social, faith-based, and leisure time activities; provide for the cultural enrichment of the community; and ensure that people have the information they need to fully participate in community life. NOTE: adapted from the definition of "Social Work" in the *Dictionary of Social Work* published by the National Association of Social Workers.

Inactive Terms: *Taxonomy* terms with their associated codes, definitions, use and see also references and relationships to Related Concepts lists which have been deactivated within a database. Inactive terms cannot be seen or selected by end users or data entry staff. The purpose is to reduce the number of terms from which data entry staff and end users must select when using the *Taxonomy*, while retaining the ability to later re-activate selected terms as needed.

Indexing: The process of classifying or indexing services within a database by assigning *Taxonomy* codes, with their associated term names, definitions, use and see also references, by which end users may locate services.

Keyword Search: See Word Search.

Level: Relative position or rank on a scale. The *Taxonomy* uses a hierarchy with a maximum of six tiers of increasing specificity. The level of a *Taxonomy* term is indicated by the structure of its *Taxonomy* code.

Recent Changes: A function on the *Taxonomy* website that allows subscribers to sort recent *Taxonomy* changes by date, code, term name or type of change and review a description of what has occurred. Subscribers may limit the list of changes displayed by supplying a date range. In addition, users can download the following files in PDF format enabling them to print specific changes as a reference: Changes by Date, Changes by Type and Changes by Code.

Referral Giving: The process of assessing the needs of the inquirer, evaluating appropriate resources, indicating organizations capable of meeting those needs, helping inquirers for whom services are unavailable by locating alternative resources, and, when necessary, actively participating in linking the inquirer to needed services by scheduling appointments, three-way calling, or negotiating for the inquirer.

Related Concepts: A set of concepts like Pregnancy, Child Abuse and Long Term Care that can be attached to *Taxonomy* terms from different parts of the hierarchy. The purpose of the related concepts is to provide different views into the *Taxonomy*. Related terms function like 'mini-directories' or sub-sets, allowing users to quickly identify a constellation of services identified with a particular target population or problem/need.

Reload Utility: See Update.

See Also Reference: Points to terms in other parts of the *Taxonomy* related to the term selected. EXAMPLE: See also references for Home Health Care are Life Care Communities, Home Dialysis, In-Home Hospice Care, and In-Home Assistance, terms found in 3 different Level 1 sections (basic service categories).

Summary Level for Reporting Purposes: A field that allows users to enter the code for another valid *Taxonomy* term that can be used instead of the first term for reporting purposes. It provides a way to develop a reporting structure for inquiry transactions other than *Taxonomy* codes used in the search and their associated problem codes.

Taxonomy: A taxonomy is a classification system that allows people to distinguish concepts, name concepts and put those concepts in order. It is used to index and access information about a subject in a systematic, unambiguous way. In a human service context, a taxonomy is a classification system that allows users to index and access community resources based on the services they provide and the target populations they serve, if any. It provides a structure for information and it tells people what is in an information system and how to find it. The *Taxonomy* is organized into ten basic service categories plus target populations. Within each basic category, services are defined with increasing degrees of specificity in a hierarchical structure of up to six tiers. The *Taxonomy* is available as an annual subscription with updates available for download from the *Taxonomy* website (www.211taxonomy.org).

Taxonomy Term Code: A combination of letters, numbers and punctuation that creates the logic of the hierarchy by designating the place and level of any term within the *Taxonomy*. Space has been left in the lettering/numbering scheme to permit growth. *Taxonomy* codes may or may not be visible to end users.

Taxonomy Term Definition: A description of the primary characteristics of a particular type of service. Each preferred term in the *Taxonomy* has a definition. They are

descriptive of the way services are provided not prescriptive for what services ought to be and help to ensure that people are using term in the same way.

Taxonomy Term Name: The label or title for a defined service; the preferred terminology.

Unavailable: A term that has been made inactive for indexing purposes.

Unused Term: A *Taxonomy* term that remains active (has not been flagged as deactivated) within a database but has not yet been used to index any services. Unused terms should be available for use in data entry and search functions by resource specialists but should not be seen by end users.

Update: The process of adding new *Taxonomy* terms with their associated codes, definitions, use and see also references and relationship(s) to related concepts lists; implementing code changes; deleting terms no longer approved with their associated codes, definitions, use and see also references and relationship(s) to related concepts lists; amending terms and definitions; adding new use and see also references to existing terms; deleting obsolete use and see also references; and then applying the changes to the services classified in a database. Updates are issued by 211 LA County and are available to those who subscribe to the *Taxonomy*. They are provided in an XML version from www.211taxonomy.org.

Use Reference: Synonyms for preferred terms that allow users to easily find a type of service without knowing the exact wording used in the *Taxonomy*; or to find the preferred term using their own terminology. Use references have reciprocal "used for references" which are listed with the preferred wording for a term. Users can get a complete list of synonyms for any term by looking at the used for references.

Word Search: Locating a word or partial word within a list of *Taxonomy* terms and use references. Also known as a keyword search.