

Using Filters to Create and Manage Taxonomy Subsets for a Resource Database

*Georgia Sales, 211 LA County,
and
Dick Manikowski, AIRS Journal editor*

While the size and scope of the Taxonomy are intended to make it a universal tool for all I&Rs and for other organizations seeking to classify health and human services, those very attributes can intimidate new users. Novices can be paralyzed by the idea of selecting the “right” terms out of a pool of more than 9,500. A possible solution is to create various subsets of the full Taxonomy which include terms that have been pre-selected for specific types of specialized databases—starter sets that serve as a point of departure for indexers daunted by the Taxonomy in its entirety. The authors describe a recent enhancement to the www.211taxonomy.org website that enables users to create, maintain and share customized versions of the Taxonomy.

In the quarter century that 211 LA County (formerly INFO LINE of Los Angeles) has been in operation, the classification system the agency created for indexing its own resource database has evolved dramatically. With input from users and people with expertise in various fields as well as extensive research, the system has grown from a few thousand terms to more than 9,500 terms—more than 7,200 of which can be used to index community, social, and governmental services, with close to another 2,200 target terms that can be combined with other terms to better focus the indexing of programs aimed at particular populations.

Along the way, the Taxonomy was endorsed by AIRS and United Way of America as a common language for human services and has been adopted by hundreds of organizations across the United States and Canada that find value in a standardized indexing system for resource databases. By using a centrally maintained set of indexing terms, individual I&Rs can focus their limited staff resources on managing their databases and assisting callers rather than on devising new terms.

Use of a standardized taxonomy also allows I&Rs to share electronic records with one another, something that would be impossible if each agency maintained its own indexing system; and as the Taxonomy is adopted for use by organizations in other fields (e.g., aging organizations, disability organizations, HMIS systems, disaster-related case managers and organizations delivering 311

services), interoperability with databases outside the I&R arena becomes possible. The scope of the Taxonomy is deliberately broad and the level of detail extensive to allow users from a wide variety of different fields to find terms that accurately and completely describe the programs they're indexing.

Too Much of a Good Thing?

Ironically, the very size and scope of the Taxonomy that make it such a universal tool can also make it intimidating to users.

Staff who are new to resource management or who are converting from a different indexing system can be overwhelmed by all of the options that are now available to them. "Should I index this program using a broad term such as ***Emergency Food (BD-1800)*** or should I opt for one of its more specific subsets: ***Brown Bag Food Programs (BD-1800.1000)***, ***Food Lines (BD-1800.1900)***, ***Food Pantries (BD-1800.2000)***, or ***Food Vouchers (BD-1800.2250)***? Or is ***Food Banks*** the right term? I don't know where to start!"

Resource managers make hundreds of decisions like this in indexing their database. Over time, consistency becomes a major challenge, particularly when they are scrolling through all 9,500 terms as they make their decisions. When a new food pantry comes to their attention, they can't always remember how they indexed the last one. Consistency is also a major challenge when agencies participating in a regional or statewide collaborative plan to merge their databases. If one agency's records index food providers at the ***Emergency Food (BD-1800)*** level and another agency indexes at a deeper level, problems will arise when their records are merged.

Even veteran indexers who have used the Taxonomy for years may find it difficult to keep track of all the terms they've used. Making good choices is only half of the battle. Remembering what those choices were and applying them consistently is equally, if not more important. Resource managers need a systematic way to capture indexing decisions and display the set of terms that they or their colleagues have "approved" for indexing purposes as a guide for indexing decisions. They also require a practical mechanism for maintaining their list of choices over time as the Taxonomy changes and grows.

Taxonomy Customization Process

Imagine someone has been given a really big toolbox for their birthday. Just because it contains a dozen different screwdrivers doesn't mean that they'll ever need them all. What it *does* mean is that when they're trying to fix something and

need to remove a screw with a weird six-pointed star-like slot in the head that neither a standard screwdriver nor a Phillips head screwdriver will fit, the toolbox will likely have the tool (it's called a Torx screwdriver) that can do the job.

The same holds true with the Taxonomy. While the Taxonomy needs to be comprehensive to accommodate the varied needs of everyone who wants to use it, no one organization is expected use it all.

I&Rs in small, rural communities will need a smaller set of terms than their counterparts in large, urban areas and less in the way of detail. **Emergency Food** will likely work just fine in these settings, whereas the ability to distinguish between **Food Pantries**, **Food Lines**, and **Food Vouchers** will be important in larger, more diverse communities with more food programs.

Likewise, the selection of terms will vary depending on the focus of the I&R service. I&Rs in the aging field will choose terms relating to services for older adults and omit services related to pregnancy and children's programs, whereas a comprehensive I&R program will need a representative sample of concepts across most sections of the Taxonomy. Similarly, 311 programs will choose terms for services offered by local government entities and omit those relating to services offered by other levels of government and the private sector. Programs working with people who are homeless or providing assistance in times of disaster will be similarly selective.

The beauty of the hierarchical structure is that the Taxonomy can be customized to meet the needs of different communities and users while preserving the overall framework that comprises the common language.

The first task of an I&R new to the Taxonomy is to select from within its vast detail the core concepts that are relevant to the community it serves and deactivate (not delete) the rest. Circumstances may arise at a later date that call for the deactivated term. Whole sections or levels of detail can be removed from view, and users can vary what they choose to do section by section. Deactivated terms become invisible to resource staff as well as to I&R specialists, creating a much more user-friendly display that helps to prevent resource staff from accidentally selecting terms that they and their colleagues have agreed should not be used. Rather than wading through 9,500 terms, a customized Taxonomy may be reduced to 2,500 terms or fewer.

The Concept of Taxonomy Starter Sets

The ability to customize the Taxonomy as the first step in implementation was a major step in making it a manageable tool, particularly when utilities to produce the customization and display the customized terms became a standard feature of I&R software packages. The customization process itself, however, is arduous

and time consuming, and all resource managers were, in the past, required to create their own customization with little guidance from people who had already gone through the process. All had to wade through the entire Taxonomy and make decisions, term by term, deciding which to deactivate and which to retain. The daunting nature of the task became a barrier to adoption of the Taxonomy, particularly by smaller I&R programs with less experienced resource staff.

Then in the midst of a discussion of use of the Taxonomy by I&R/A programs in the aging area, an idea surfaced: what if a group of experts were to go systematically through the Taxonomy and select the terms that would likely be useful in resource databases in the aging arena and make the resulting “mini Taxonomy” available in addition to the Taxonomy in its entirety? At that moment, the concept of the Aging and Disability Starter Set was born and the stage was set for development of the Filter function on the Taxonomy website.

Pilot Project: Starter Taxonomy for Aging and Disability I&Rs

Under the leadership of *Theresa Lambert*, formerly Deputy Director of the National Association of State Units on Aging (NASUA) and Director of the U.S. Administration on Aging-funded National Aging I&R Support Center, a workgroup of people¹ with expertise in the aging and disability fields met over the period of a year to develop a customized version of the taxonomy that contains only Taxonomy terms needed by I&Rs that work specifically with older persons and/or with people with disabilities. Because terms not relevant to these fields would be excluded, the customized Taxonomy would be easier to understand and use as a classification tool, facilitating its implementation in these specialized settings. The remaining terms would be deactivated rather than deleted, making it possible for new users to evaluate the starter set and reactivate additional terms that might be appropriate based on the availability of resources in a particular community and the populations served by a particular agency. Once the customized version was complete, the thought was that an arrangement could be

¹ Members of the workgroup include: Heather Burkhardt, North Carolina Division of Aging & Adult Services; Mary A. Chilvers, Krista Boston and Tom Gossett, Minnesota Board on Aging; Patrice Earnest, Atlanta Regional Commission, AAA; Mary G. James, New Mexico Aging & Long Term Care Services Department; Kara R. LeBeau, State Policy Analyst, National Association of State Directors of Developmental Disabilities Services (NASDDDS), Virginia; Kathleen McHarg, Multnomah County Aging & Disability Services (AAA); Susan Shepherd, Washington Aging & Disability Services Administration; Maurine Strickland, Wisconsin Bureau of Aging and Disability Resources; and Christina Neill, The Lewin Group. Representatives from AoA include: Greg Case, Sherri Clark, and Greg Link.

made with software vendors to show as active only terms in the starter set when the Taxonomy is loaded.

The final product winnowed the full Taxonomy's roughly 7,200 service terms down to about 1,800—a reduction of 75%. Target terms were pared from nearly 2,200 to about 800.

The operative question then became: how to make the Aging and Disability Starter Set (and others that might be developed) available to people who want to use it?

Introducing Taxonomy Filters

The new Filters function on the Taxonomy website (www.211taxonomy.org) provides solutions to a lot of problems. Users can now create, share and maintain customized versions of the Taxonomy using the same process available in their software—excluding terms they do not wish to include. The filters work just like an oil or water filter that removes unwanted impurities, and they can be applied when reports are created in the Print function or searches are run on the website. Users can also download their filtered set in XML format, a file that can be read by a software utility developed by the vendor to apply the filter within the user's software. The filter XML files are subsets of the regular Taxonomy XML file that include only terms in the filter the user selects.

The bonus: users can choose an existing filter as a point of departure rather than having to go through the entire 9,500 terms. An extra bonus: the system will help with filter maintenance. Even if resource managers have already customized their Taxonomy, it is possible to replicate it on the website and save time from that point forward. Users who are part of a database collaborative can have two filtered sets: one for the collaborative and a second one for their own database that reflects the needs of their community. Customized sets for database collaboratives tend to be less detailed than those the larger organizations in the group develop and use locally.

Types of Filters

Some filters are "official" (created by the Taxonomy editor at 211 LA County in collaboration with experts in a particular area). Others have been created by subscribers and may be shared (community filters) or kept as private (private filters). Requests to share filters must be approved by the Taxonomy editor. Official and community filtered sets are available to all subscribers.²

² The filters module is not accessible to non-subscribers. Non-subscribers are allowed only limited access to the Taxonomy website in order to allow them to get a feel for the site's

To access the Filter function, click on the [Filters](#) tab. The system provides an [Add a filter](#) option which allows users to create a new filter from scratch and displays existing filters grouping them into the three categories described above:

Private filters

Name	Action
TIP Database	edit share delete clone

Asterisked (*) filters have been submitted for approval.

Official filters

Name	Action
Aging and Disability Starter Set	view details clone
Aging and Disability Starter Set for Small Communities	view details clone
Canadian Municipal Services	view details clone

Community filters

Name	Action
211 LA COUNTY	view details clone
311 Halton Services	view details clone
InformAlberta Taxonomy Outline	view details clone
Virginia-Maryland-DC Customized Taxonomy	view details clone
WIN211 Data Managers	view details clone

Asterisked (*) filters were submitted by you, and can be edited and maintained.

- **Official Filters:** Three official filters are currently available. Two Aging and Disability Starter sets (one for larger communities and another, slimmer one for programs that cover a small geographic area or have limited resources available in their community to serve these populations); and a set of terms that can be used by 311 programs or other I&Rs in Canada that manage requests relating to municipal services. Each of these filters was developed in consultation with people having relevant expertise. They are suggested as useful points of departure for organizations maintaining databases and/or handling calls in these areas.
- **Community Filters:** Five filters are available at this time in the Community Filters section, four of them representing working customizations developed by I&R programs or groups of programs working as a shared database

structure, content, and features before making a commitment to purchase a subscription. (They won't even see the *Filters* tab.) In order to access the filters module and various other advanced features of the Taxonomy website, an organization's users must log into it using the e-mail address and password that were set up when the subscription was obtained.

collaborative. The fifth represents a 311 program in Ontario, Canada. While community filters may be shared with others who would like to take a look at what other organizations have done and perhaps choose one as a starting point for their own customization, they are not officially “recommended.”

- **Private Filters:** These can only be viewed and edited by the agency that created them. If my agency has created a private filter, our staff can see it when they log into the Taxonomy website . . . but your staff can't. But should we choose to share that private filter with other agencies (as in the situation of a consortium of I&R agencies who want to standardize their working taxonomies), we can request that the filter be reclassified as a community filter by clicking on the [share](#) link.

Private filters

Name	Action
TIP Database	edit share delete clone

Creating and Sharing Filters

Manage Filters Screen: To begin, click on [Add a filter](#) or select a current filter to use as your starting point and click on [clone](#). You may also edit, share or delete filters from this page, but only those that your agency has created. In addition, you can click on [Custom XML page](#), specify the filter and country/language you want and download a copy of the contents of the filter in XML format (see the section titled “Downloading Filtered Versions of the Taxonomy” below for details).

While you can't actually edit an existing official or community filter, the [clone](#) link next to the *Aging and Disability Starter Set* entry, for example, permits you to make a private copy of it which you can then edit. After clicking on the [clone](#) link, you will see that the Private Filters section now contains something called *Copy of: Aging and Disability Starter Set* and that you have options to [edit](#), [share](#), [delete](#), or [clone](#) that copy.

Private filters

Name	Action
Copy of: Aging and Disability Starter Set	edit share delete clone

Asterisked (*) filters have been submitted for approval.

Official filters

Name	Action
Aging and Disability Starter Set	view details clone

Manage Filter: <Filter Name>: The original copy (under the [Official Filters](#) section) can only be viewed or cloned. But if you click on the [edit](#) link for the *Copy of: Aging and Disability Starter Set* filter in the Private Filters section, you are taken to the Manage Filter screen for that filter where new options appear:



From this screen, you can return to the previous screen ([Manage filters](#)), include/exclude terms (begin to build your filter or work with one that needs modification), edit your filter’s name and description, view term counts, or generate an outline report in two formats (the same reports you can create using the “Filter Outline Report” custom report option under the [Print](#) tab). The latter can be created and printed once your filter has been completed. See the section titled **Working with Filter Reports** below for details. The filter description and a list of excluded terms/sections are also displayed on this screen.

Filter Description: A filter name is required for all filters. Other information includes the contact name and phone number for the individual responsible for the filter and a filter description. All fields are mandatory for official and community filters, but it is advisable to provide contact information and a description for private filters. If editing an existing filter, a new name and description should be entered (click on [Edit name and description](#)).

Filter Name *	TIP Database
Contact Name	Dick Manikowski
Contact Phone Number	313.833.1020 x2295
Description	Sample filter developed while testing the capabilities of the new Filters capability of the Taxonomy Web site.

* required

View Term Counts: When you click on [View term counts](#), the system calculates the total number of terms in the filter as well as the number of lowest level terms on each branch that can be used for indexing purposes. These figures should help people evaluate the level of detail in each of the published filters when selecting a starting point for customization for their own community. Consider including them in your filter description.

The screenshot shows the 'The AIRS/211 LA County Taxonomy of Human Services' interface. At the top, it displays the user 'Dick Manikowski Profile' and 'Log out'. Below this, it indicates 'Viewing: US English Taxonomy, filter: none (change)'. A navigation bar includes buttons for 'Home', 'Search', 'Print', 'Download', 'Recent Changes', 'Filters', 'Resources', and 'Help'. A breadcrumb trail reads 'Home » Manage Filters » Copy of: Aging and Disability Starter Set » Total Terms for Copy of: Aging and Disability Starter Set'. A table at the bottom shows 'Total included terms' as 3251 and 'Total lowest level terms' as 2735.

Generate Outline Report: This feature will be discussed in the **Working with Filter Reports** section later in this article.

Include/Exclude Terms: When you click on [Include/exclude terms](#), the system displays the level I terms in the Taxonomy.

Level 1 Taxonomy Term	Action
B Basic Needs *	Exclude term
D Consumer Services *	Exclude term
F Criminal Justice and Legal Services *	Exclude term
H Education *	Exclude term
J Environmental Quality *	Exclude term
L Health Care *	Exclude term
N Income Support and Employment *	Exclude term
P Individual and Family Life *	Exclude term
R Mental Health Care and Counseling *	Exclude term

You can exclude an entire section by clicking on [Exclude term](#), or you can display levels 2-6 of each section by clicking on the Level I term name. This allows you to exclude some terms within a section but retain others. The system is structured to preserve the hierarchical tree, so if you want to stop at level 3 in a particular section, you can remove level 4, 5 and 6 terms but cannot deactivate the level 1 and 2 supporting terms. You must edit (or leave unchanged) all 11 sections to complete the first iteration of your filter.

When you select a level I term, the system displays all of the terms within that section.

Only terms displayed in bold type are included in the taxonomy when this filter is applied.

Code	Name	Action
B	Basic Needs	Exclude term Exclude children
BD	Food	Exclude term Exclude children
BD-1500	Community Wide Food Storage Facilities	Include term
BD-1800	Emergency Food	Exclude term Exclude children
BD-1800.1000	Brown Bag Programs	Exclude term
BD-1800.1900	Food Lines	Include term
BD-1800.2000	Food Pantries	Exclude term Exclude children

In the above example, the terms **BD-1500 Community Wide Food Storage Facilities** and **BD-1800.1900 Food Lines** are currently filtered out. Note the text above the terms on the preceding screenshot: Only terms displayed in bold type are included in the taxonomy when the filter is applied. To remove a term from the filter, click on the Exclude term link next to it.

For each term, you have three options:

- to include the term and its children;³
- to exclude the term (which also excludes all its children);
- or to exclude the children (leaving the term itself selected). The terms in bold are included in the Taxonomy; the others are excluded.

Excluded terms may be re-included by clicking on Include term. When you exclude a term's children, Include term (and parents) appears next to their names after the screen refreshes, allowing you to re-include each child term individually. If you decide you only want one or two children in a particular section for example, you can exclude the children as a group and then reactivate only the ones you want. This should take less time than excluding each of the children you **don't** want, one-by-one. Alternatively, if you want to include most of the children, exclude those you do not want individually. This flexibility comes in very handy in very large sections, e.g., **YF Diseases/Disabilities**.

Beginning in August of 2010, the filter function was upgraded to display different views of the Taxonomy depending on which locale⁴ you are viewing

³ In taxonomy nomenclature, a term's *children* (or *child terms*) are the terms which fall beneath it in its branch of the hierarchy. Similarly, a term's *parent term* is the term which is immediately above it.

⁴ The "locales" for a term represent a merger of the language in which the term and associated data elements appear (currently English and French) and the domain of application (currently the U.S. and Canada). The default locale is *US English*, but there are also options for *Canadian English* and *Canadian French* locales. The *Canadian English* locale includes both Canadian spelling (*colour* rather than *color*) and Canadian terminology (*First Nations Communities* rather than *Native American Community*). Terms in the *Canadian French* locale are in French. One can easily switch between locales and filters via the Change link below the Profile link at the top of most screens.

(U.S. English, Canadian English or Canadian French). Originally, the master version of the Taxonomy was displayed. It includes both Canadian only and U.S. only terms, displays U.S. term names rather than Canadian ones, even when there is a difference, and is normally only seen and used by the Taxonomy editor. The upgrade introduced several improvements. If you are viewing the U.S. English Taxonomy, Canadian only terms are now obviously grayed out allowing you to identify and ignore them more easily. If you are viewing the Canadian English Taxonomy, there are two improvements: U.S. only terms are grayed out as described above AND Canadian term names are displayed rather than their U.S. English counterparts when there is a variance between the locales. Below are examples from the **NL Public Assistance Programs** section illustrating how U.S. only and Canadian only terms are handled in the three locales. Note that none of the terms is grayed out in the Master Taxonomy, while five Canadian terms are grayed out in the U.S. English locale and nine U.S. terms are grayed out in the Canadian English locale.

NL	Public Assistance Programs	Exclude term Exclude children
NL-1000	Basic Income Maintenance Programs	Exclude term Exclude children
NL-1000.0300	Allowance for the Survivor Program	Exclude term
NL-1000.2000	First Nations Social Assistance Programs	Exclude term
NL-1000.2400	Gap Group Income Maintenance Programs	Exclude term Exclude children
NL-1000.2400-150	Cash Assistance Program for Immigrants	Exclude term
NL-1000.2400-800	State Administered SSI Supplement Programs	Exclude term
NL-1000.2500	General Relief	Exclude term Exclude children
NL-1000.2500-230	General Relief Appeals/Complaints	Exclude term
NL-1000.2500-250	General Relief Applications	Exclude term
NL-1000.2500-270	General Relief Check Outlets	Exclude term
NL-1000.2600	Guaranteed Income Supplement	Exclude term
NL-1000.3000	Homeless Financial Assistance Programs	Exclude term
NL-1000.6000	Native American General Assistance	Exclude term
NL-1000.6200	Old Age Security Program	Exclude term

MASTER TAXONOMY VIEW

NL	Public Assistance Programs	Exclude term Exclude children
NL-1000	Basic Income Maintenance Programs	Exclude term Exclude children
NL-1000.0300	Allowance for the Survivor Program (in master taxonomy)	Exclude term
NL-1000.2000	First Nations Social Assistance Programs (in master taxonomy)	Exclude term
NL-1000.2400	Gap Group Income Maintenance Programs	Exclude term Exclude children
NL-1000.2400-150	Cash Assistance Program for Immigrants	Exclude term
NL-1000.2400-800	State Administered SSI Supplement Programs	Exclude term
NL-1000.2500	General Relief	Exclude term Exclude children
NL-1000.2500-230	General Relief Appeals/Complaints	Exclude term
NL-1000.2500-250	General Relief Applications	Exclude term
NL-1000.2500-270	General Relief Check Outlets	Exclude term
NL-1000.2600	Guaranteed Income Supplement (in master taxonomy)	Exclude term
NL-1000.3000	Homeless Financial Assistance Programs	Exclude term
NL-1000.6000	Native American General Assistance	Exclude term
NL-1000.6200	Old Age Security Program (in master taxonomy)	Exclude term

U.S. ENGLISH VIEW – CANADIAN ONLY TERMS GRAYED OUT

NL	Public Assistance Programs	Exclude term Exclude children
NL-1000	Basic Income Maintenance Programs	Exclude term Exclude children
NL-1000.0300	Allowance for the Survivor Program	Exclude term
NL-1000.2000	First Nations Social Assistance Programs	Exclude term
NL-1000.2400	Gap Group Income Maintenance Programs (in master taxonomy)	Exclude term Exclude children
NL-1000.2400-150	Cash Assistance Program for Immigrants (in master taxonomy)	Exclude term
NL-1000.2400-800	State Administered SSI Supplement Programs (in master taxonomy)	Exclude term
NL-1000.2500	General Relief (in master taxonomy)	Exclude term Exclude children
NL-1000.2500-230	General Relief Appeals/Complaints (in master taxonomy)	Exclude term
NL-1000.2500-250	General Relief Applications (in master taxonomy)	Exclude term
NL-1000.2500-270	General Relief Check Outlets (in master taxonomy)	Exclude term
NL-1000.2600	Guaranteed Income Supplement	Exclude term
NL-1000.3000	Homeless Financial Assistance Programs (in master taxonomy)	Exclude term
NL-1000.6000	Native American General Assistance (in master taxonomy)	Exclude term
NL-1000.6200	Old Age Security Program	Exclude term

CANADIAN ENGLISH VIEW – U.S. ONLY TERMS GRAYED OUT

In the examples below, the first drawn from the Canadian English locale and the second from the U.S. English, two U.S. only terms have been grayed out in the Canadian view (as in the examples above), but note that **BH-1800.1500-700** bears the Canadian term name **Juvenile/Youth Shelters** in the Canadian view while the U.S. term name is **Runaway/Youth Shelters**. This enhancement greatly improves the filter creation process for Canadians.

BH-1800.1500	Crisis Shelter	Exclude term Exclude children
BH-1800.1500-050	Crisis Nurseries/Child Care	Exclude term
BH-1800.1500-080	Domestic Violence Motel Vouchers (in master taxonomy)	Exclude term
BH-1800.1500-100	Domestic Violence Shelters	Exclude term
BH-1800.1500-140	Elder Abuse Shelters	Exclude term
BH-1800.1500-200	Family Crisis Shelters (in master taxonomy)	Exclude term
BH-1800.1500-300	Hospital Safe Rooms	Exclude term
BH-1800.1500-330	Immigrant/Refugee Shelters	Exclude term
BH-1800.1500-700	Juvenile/Youth Shelters	Exclude term
BH-1800.1500-750	Safe Houses	Exclude term
BH-1800.1500-800	Sexual Assault Shelters	Exclude term
BH-1800.1500-850	Temporary Shelters for Wandering Adults	Exclude term

CANADIAN ENGLISH VIEW – CANADIAN TERM NAME DISPLAYED (BH-1800.1500-700)

BH-1800.1500	Crisis Shelter	Exclude term Exclude children
BH-1800.1500-050	Crisis Nurseries/Child Care	Exclude term
BH-1800.1500-080	Domestic Violence Motel Vouchers	Exclude term
BH-1800.1500-100	Domestic Violence Shelters	Exclude term
BH-1800.1500-140	Elder Abuse Shelters	Exclude term
BH-1800.1500-200	Family Crisis Shelters	Exclude term
BH-1800.1500-300	Hospital Safe Rooms	Exclude term
BH-1800.1500-330	Immigrant/Refugee Shelters	Exclude term
BH-1800.1500-700	Runaway/Youth Shelters	Exclude term
BH-1800.1500-750	Safe Houses	Exclude term
BH-1800.1500-800	Sexual Assault Shelters	Exclude term
BH-1800.1500-850	Temporary Shelters for Wandering Adults	Exclude term

U.S. ENGLISH VIEW – US. TERM NAME DISPLAYED (BH-1800.1500-700)

Finally, the example below from the Canadian English locale illustrates how excluded terms (in regular type) are distinguished from U.S. only terms (grayed out) and terms that remain active within the locale (in bold).

BH-1800.1500	Crisis Shelter	Exclude term Exclude children
BH-1800.1500-050	Crisis Nurseries/Child Care	Include term
BH-1800.1500-080	Domestic Violence Motel Vouchers (in master taxonomy)	Exclude term
BH-1800.1500-100	Domestic Violence Shelters	Exclude term
BH-1800.1500-140	Elder Abuse Shelters	Exclude term
BH-1800.1500-200	Family Crisis Shelters (in master taxonomy)	Exclude term
BH-1800.1500-300	Hospital Safe Rooms	Exclude term
BH-1800.1500-330	Immigrant/Refugee Shelters	Exclude term
BH-1800.1500-700	Juvenile/Youth Shelters	Exclude term
BH-1800.1500-750	Safe Houses	Exclude term
BH-1800.1500-800	Sexual Assault Shelters	Exclude term
BH-1800.1500-850	Temporary Shelters for Wandering Adults	Include term

CANADIAN ENGLISH VIEW – STYLING FOR EXCLUDED TERMS, ACTIVE TERMS AND U.S. TERMS

You can switch to “outline view” to see a working list of only the terms you have included and then switch back to “working view” to continue your work. This function is very useful as you begin to shape your filter. Your selections automatically save as you go along. You can [return to first level terms](#) at any point. Sections that you have edited are referenced with an asterisk.

When a new filter has been completed, return to the [Manage Filter](#) page for that filter. The terms you have excluded are listed at the bottom of the page. This page serves as a summary for the filter you have created and will be modified as additional changes are made.

Excluded terms

- BD-1500 Community Wide Food Storage Facilities (and children)
- BD-1800.1900 Food Lines (and children)
- BD-1800.2000-620 Occasional Emergency Food Assistance (and children)
- BD-1800.2000-640 Ongoing Emergency Food Assistance (and children)
- BD-1800.2500 Government Surplus Food Distribution Sites (and children)
- BD-1800.8200-150 Dehydrated Food (and children)
- BD-1800.8200-250 Formula/Baby Food (and children)
- BD-1800.8200-255 Fresh Food (and children)
- BD-1800.8200-300 Gluten Free Food (and children)
- BD-1800.8200-320 Halal Food (and children)
- BD-1800.8200-600 No Cook Food (and children)
- BD-1800.8200-650 Organic Food (and children)
- BD-1800.8200-800 Specialty Ethnic Foods (and children)
- BD-1850 Emergency Food Clearinghouses (and children)
- BD-2350 Food Mail Program (and children)
- BD-2400.1500 Community Supported Agriculture (and children)
- BD-2400.2000 Farm Trails (and children)
- BD-2400.2600 Grocery Stores (and children)
- BD-2400.4900 Markets Accepting EBT Cards (and children)
- BD-2400.7000 Rent A Tree (and children)
- BD-2400.9000 U-Pick Programs (and children)
- BD-2600.0300 Food Production Economics (and children)

To complete the process, click on [Return to Manage Filters](#). The new filter is

listed as a private filter. To make a request to share your new filter, click on [share](#). The name of the filter will be transferred to the list of Filters submitted for approval. The filter will be reviewed by the Taxonomy editor and, if approved, moved to the Community filters section.

Maintaining Filters

When the 211 Taxonomy website is updated, the system will help you maintain your filter by doing the following with new terms:

- If the parent term has been excluded from filtered results, new child terms will be excluded as well.
- If all children of a parent have been excluded, new child terms will be excluded as well.
- If some or all sibling terms have been included/excluded on an individual basis, new terms will be included.
- If the parent term has been included and there are no current children, new child terms will be included.

All terms added provisionally are flagged for your review. Be sure to check your filter after each update to ensure that you review and confirm the decisions that have been made for you by the system. The listing is cumulative so no damage is done if you skip the process for an update or two. You will simply have a longer list to manage. Remember that provisionally added terms are “in” unless you remove them and are visible to others who have access.

Note: The following terms were added to the filtered set as a result of taxonomy changes:

- BD-2600.0500-052 Agricultural Soil Testing ([Manage section](#))
- BH-8900.9100-860 Trash/Garbage Bill Payment Assistance ([Manage section](#))
- BR-2500 Gift Card Distribution Programs ([Manage section](#))
- DD-1500.2250 Debt Consolidation Service Complaints ([Manage section](#))
- DD-5000.1980 Financial Assessment Tools ([Manage section](#))
- DF-7000.1850-220 Enhanced Driver Licenses ([Manage section](#))
- DF-7000.6590 Passport Cards ([Manage section](#))
- DF-7020 Records/Licenses/Permits Fee Payment Assistance ([Manage section](#))
- DF-7020.0200 Academic Records Fee Payment Assistance ([Manage section](#))
- DF-7020.1000 Birth Certificate Fee Payment Assistance ([Manage section](#))
- DF-7020.1500 Criminal Background Check Fee Payment Assistance ([Manage section](#))
- DF-7020.1700 Death Certificate Fee Payment Assistance ([Manage section](#))
- DF-7020.1800 Driver License Fee Payment Assistance ([Manage section](#))
- DF-7020.3300 Identification Card Fee Payment Assistance ([Manage section](#))
- DF-8000.0200 Accessibility Related Standards/Legislation Compliance ([Manage section](#))
- DF-8000.4500-160 COBRA Regulation ([Manage section](#))
- FL-8750 Transit Police ([Manage section](#))
- FN-1700.1470-160 Credit Repair Fraud Reporting ([Manage section](#))
- HD-1800.6500-680 Preschool Cooperatives ([Manage section](#))
- JF-1200.1500-480 Manufactured/Mobile Home Park Building Permits ([Manage section](#))
- JF-1200.1500-490 Manufactured/Mobile Home Placement Permits ([Manage section](#))

Downloading Filtered Versions of the Taxonomy

You can generate and download an XML file for any of the available filters

including those you have developed and kept as private. The filter XML is identical to the regular XML file except that it includes only those terms you have included in your filter. Simply click on [custom xml page](#), mark the country and language of your choice, indicate the filter you want to select and click **OK**. The system generates the file which you can download to your desktop. Remove the file from the server when you are through. The form you will see is below.

of Human Services

Home
Search
Print
Download
Recent Changes
Filters
Resources

Home » Download the Taxonomy » Generate Custom XML

Locale *	<input checked="" type="radio"/> US English <input type="radio"/> Canadian English <input type="radio"/> Canadian French
Filter	<input type="radio"/> None <input type="radio"/> 211 LA COUNTY (community) <input type="radio"/> 311 Halton Services (community) <input type="radio"/> InformAlberta Taxonomy Outline (community) <input type="radio"/> Virginia-Maryland-DC Customized Taxonomy (community) <input type="radio"/> WIN211 Data Managers (community) <input checked="" type="radio"/> Aging and Disability Starter Set (official) <input type="radio"/> Aging and Disability Starter Set for Small Communities (official) <input type="radio"/> Canadian Municipal Services (official) <input type="radio"/> Copy of: Aging and Disability Starter Set (private) <input type="radio"/> TIP Database (private)
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

* required

The XML download (see the partial screen shot below) isn't very user friendly. Its purpose is to provide instructions as to what changes need to be made when the downloaded filter is applied to your resource database. AIRS and 211 LA County have provided software vendors with the technical information they'll need to read the XML file and use it to update the Taxonomy customization within your database. You can do your part by emphasizing to your vendor how important the ability to apply a filter to your database is to you.

```

- <taxonomy name="Taxonomy of Human Services" releaseDate="2009-06-16T00:07:20Z" country="us" language="eng" xsi:schemaLocation="http://www.211taxonomy.org/resources/xml_schema/taxonomy.xsd taxonomy.xsd">
- <record code="B">
  <name>Basic Needs</name>
  - <definition>
    Programs that furnish survival level resources including food, housing, material goods, transportation and temporary financial assistance for individuals with low or fixed incomes, people who are homeless, older adults and/or people with disabilities who are otherwise unable to adequately provide for themselves and their families. Also included are related services that are available to the community at large.
  </definition>
  <facet>Service</facet>
  <comments/>
  <bibliographicReference/>
  <createdDate>1992-03-10</createdDate>
  <lastModifiedDate>2005-03-02</lastModifiedDate>
  <useReference>Basic Subsistence</useReference>
- <record code="BD">
  <name>Food</name>
  - <definition>
    Programs that seek to meet the basic nutritional needs of the community by providing access to free or low cost food products.
  </definition>
  <facet>Service</facet>
  <comments/>

```

The filter XML download function can be accessed from the general Manage Filters screen as well as from the [Download](#) page.

Working with Filter Reports

It's obvious that a list of included terms is easier for an indexer to work with than a list of excluded terms. There are a couple of different report options featuring filters that will do just this. The Custom Reports section under the [Print](#) tab offers two filters options:

Filtered: This option allows you to choose a customized version of the Taxonomy created and saved using the Manage Filters function to determine which terms will be included in your custom report. You can then choose the locale (U.S. English, Canadian English or Canadian French), specify the format (organized by code or by term name), select the fields to include (definition, use references, see also references, related concepts, external system terms, comments and bibliographic references) and specify the levels you wish to include as in the Full Taxonomy Report. Click on [OK](#) to generate the report.

Home » Print the Taxonomy » Create a Custom Report

Locale *
 US English
 Canadian English
 Canadian French

Sort by *
 Code
 Name

Included Fields
 Definition
 Use References
 See Also References
 Related Concepts
 External System Terms
 Comments
 Bibliographic References

Taxonomy Level *
 Level 1
 Level 2
 Level 3
 Level 4
 Level 5
 Level 6

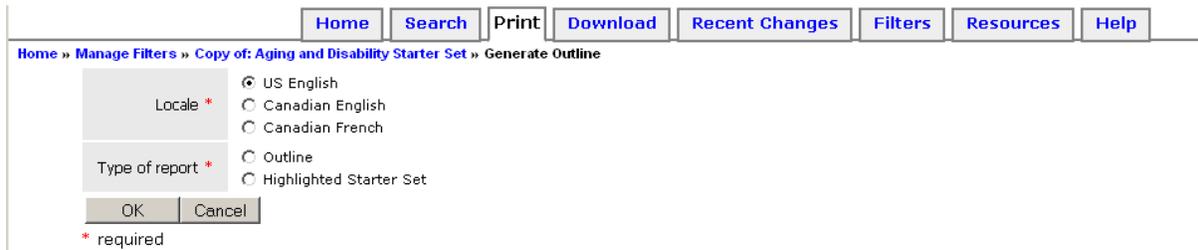
[i] Level refers to the term's place in the taxonomy structure and the length of its code.

OK Cancel

* required

Filter Outline Report: This option allows you to identify a locale, specify one of the available filters and request one of two types of outline reports: the regular Outline or the Highlighted Starter Set (a report that grays out higher level terms on a branch and shows in bold the lower level terms on each branch that can be used for indexing purposes). The outline reports provide an “at-a glance” view of the hierarchical structure and contents of the selected filter. The filter outline

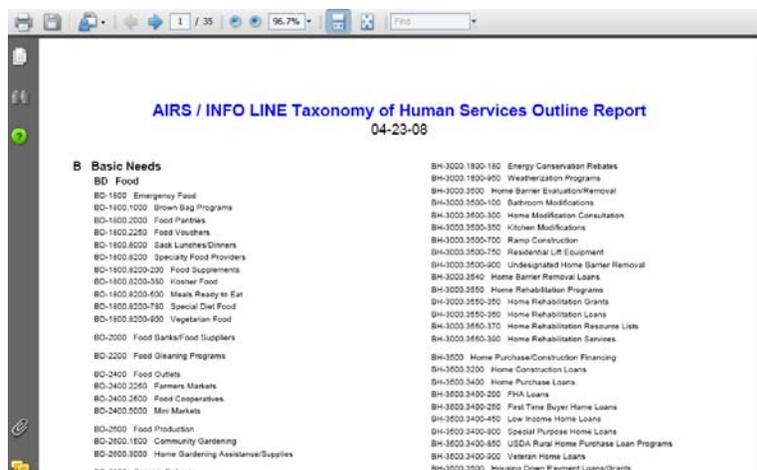
reports are also accessible from the Manage Filters screen for a particular filter.



After the server generates either of the reports, you'll be brought to a screen that permits you to either download the report outline or delete it from the server.



Clicking on the Download Report link will download the outline report (a process that can take several minutes) in the familiar PDF format. Reports for filters with a lot of terms and additional fields (e.g., definitions, use references, see also references and bibliographic references) may take considerably longer to download.



The Highlighted Starter Set is somewhat different. A snippet from that report is below:

B Basic Needs**BD Food**

BD-1800 Emergency Food

BD-1800.1000 Brown Bag Food Programs**BD-1800.2000 Food Pantries****BD-1800.2250 Food Vouchers****BD-1800.8000 Sack Lunches/Dinners**

BD-1800.8200 Specialty Food Providers

BD-1800.8200-200 Food Supplements**BD-1800.8200-380 Kosher Food****BD-1800.8200-500 Meals Ready to Eat****BD-1800.8200-780 Special Diet Food****BD-1800.8200-900 Vegetarian Food****BD-2000 Food Banks/Food Distribution Warehouses****BD-2200 Food Gleaning Programs**

BD-2400 Food Outlets

BD-2400.2250 Farmers Markets**BD-2400.2500 Food Cooperatives****BD-2400.5000 Mini Markets**

Your agency can only have one report saved to the Taxonomy server at a time. Before you can generate another report, you'll have to delete any report currently stored on it. But like most PDF documents, you have the options of printing the document in hard copy (via the printer icon) or saving a copy of it to your local drive (via the floppy disk icon).

Searching Using a Filter

You also have the ability to select any of the published customized versions of the Taxonomy created by the Manage Filters function to use as the basis of your search. On the Search screen, click on the change link next to the *Viewing: <Filter Name>* text.

The AIRS/211 LA County
Taxonomy
of Human Services

[Dick Manikowski Profile](#) [Log out](#)
Viewing: US English Taxonomy, filter: none ([change](#))



Home
Search
Print
Download
Recent Changes
Filters
Resources
Help

Home » Search by Keyword
Enter a word or portion of a name to see all related taxonomy records.

Keyword:

NOTE: to run a search using one of the filters, click on "change" next to "Viewing" and select the filter you wish to apply. Resulting searches will include only terms included in the customized filtered set.

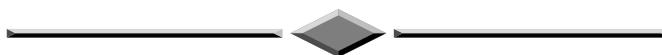
The screen that comes up next will permit you to specify both a locale and any official or community filter or any of your own agency's private filters.

Resulting searches will include only terms that are part of the customized filtered set. Make sure to reset the filter option to *None* unless you want your choice to persist. The name of the filter you have selected (or none) is displayed next to the Taxonomy version (country/language) you are viewing. This can serve as a reminder!

* * *

The Taxonomy filter feature provides a valuable tool for managing the Taxonomy terms in your own database, especially for agencies that work together in a collaborative database.

But it can be even more useful. You can do your part by emphasizing to your vendor how important it is to you that the filters function be implemented in your software.



Georgia Sales has more than 25 years of experience in information and referral. She serves as Resource Systems Developer for 211 LA County and manages the ongoing development of the AIRS/211 LA County Taxonomy of Human Services. She is a member of the AIRS Board and has worked on a number of projects including the AIRS Standards, the AIRS Certification program for I&R specialists (CIRS) and resource specialists (CRS), and the AIRS Accreditation program for I&R organizations. She has also worked with several other groups at the national level to increase the visibility of I&R and related products and services.

211 LA County
P.O. Box 726
San Gabriel, CA 91778
626.350.1841 x2120 (voice)
gsales4215@aol.com (e-mail)

Dick Manikowski worked in I&R for the Detroit Public Library's TIP Service for nearly 24 years before retiring in 2009. He remains active in AIRS and has conducted annual trainings on indexing with the [AIRS/211 LA County Taxonomy](#) at the AIRS Annual Training and Education Conference and developed and conducted customized indexing trainings for statewide groups from Michigan, Indiana, and Ohio.

4273 Crooks Rd., #8
Royal Oak, MI 48073-1933
248.770.0523 (cell)
dickmanikowski412@gmail.com (e-mail)