HOW TO KEEP YOUR TAXONOMY UPDATED
Revised 2-12-19

Background

211 LA County (previously INFO LINE of Los Angeles) works continuously to ensure that the structure and contents of the Taxonomy accurately reflect the changing service delivery system and meets the ongoing needs of subscribers[1]. Specific updates are based on suggestions from users, input from subject area experts who review the Taxonomy, terminology from other classification systems, newspaper articles about services, service-related websites and information from a variety of other sources.

In the past, changes and additions to the Taxonomy were distributed to users in the form of printed supplements, usually at 18-month intervals. The supplements organized update information by Taxonomy code and described specific changes that users needed to make in order to stay current. Files to help users update their databases were also provided on diskette.

Taxonomy update information can now be found on the Taxonomy website (www.211taxonomy.org) maintained by 211 LA County. As a subscriber, you can review a list of changes and organize them by code, term, date and type as well as print a copy of supplement-like documents that describe the nature of specific changes and additions. You can download U.S. and Canadian versions of the Taxonomy in XML format that allow you to update your database whenever you choose using the utility provided in your software. The Filters function can help you automate your Taxonomy customization process to create a structure that meets the needs of your community.

So, what do you need to do to keep up with the changes? Here are the basic steps in brief:

- ✓ Develop a timetable and a process for doing your updates.
- ✓ Understand the impact that different types of changes will have on your database when you perform an update.
- ✓ Understand and become proficient in using the updating tools that are available to you on the Taxonomy website and in your software.
- ✓ Have a plan for managing local modifications.
- ✓ Automate your customization using the filters function.

Develop a Timetable and Process for Updating

There are a number of things you need to consider when developing a Taxonomy updating plan. Here are some of them.

1. How often do you want to update? Whenever the Taxonomy website is updated? Quarterly? Every six months? Annually? Variably depending on your indexing needs? There are tradeoffs. The more frequently you update, the fewer changes you need to manage each time. But you have to find time to integrate the update process into your daily work schedule, so less frequently may be the better option. The ease with which you can incorporate changes in your system will depend heavily on the user-friendliness of utilities your software provider has made available to you. This may also affect your scheduling decision.

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[1] Agencies that pay an annual subscription fee create a password that allows their staff full access to the www.211taxonomy.org website. Staff of agencies that don't have a subscription are welcome to visit the site and explore it, but their access is limited and some features are totally inaccessible to them. For more information about subscribing, browse to www.211taxonomy.org/help/subscribe

2. Are you part of a shared database collaborative or do you have other partners with whom your update process needs to be coordinated? If so, you need to agree on an update schedule and choose the same version of the Taxonomy XML file to download. Remember that you need to plan time to update your shared customization of the Taxonomy so you stay on the same page with your partners as you make new indexing decisions. You also need time to reindex affected records, where necessary, before combining your data.

3. Who needs to be involved in the update process at your agency? Will technical staff manage the download and run the utility or can resource staff do it? This may affect your schedule. Or does your software vendor manage the Taxonomy update process?

4. What does the update process involve? There are a number of steps[2]:

   ✓ Go to the Recent Changes page on the website and review the changes that have occurred since your last update. Every update will be different depending on the terms you have already used in your database and the number of new terms you may need to use. If you are maintaining your customization via the website's filter function, the system will help you pinpoint relevant new terms that you need to consider. Tip: consider integrating key additions and changes manually between major updates if your software permits. This allows you to get on with your indexing tasks while you are working with particular records and will save you time when you do your next comprehensive update.

   ✓ Are there training implications for resource staff? If you spotted a definition change that will necessitate re-indexing a set of records, for example, that information needs to be shared if others are involved in maintenance activities. Or if a new term that you needed is now available, indexers need to know that. If you have tools that guide specific indexing decisions, you may need to make revisions. It is important to take whatever steps you can to assure ongoing consistency in indexing practices.

   ✓ Go to the Download page on the website and retrieve the update file.

   ✓ Use the utility provided in your software to run the update. If terms you have used have been deleted and there are multiple replacements, use the process provided in your software to select the most appropriate replacement for each affected record.

   ✓ Update your customization of the Taxonomy and print copies of the updated outline (or whatever other reference tool you may have) for use by resource staff. You may want to take advantage of the filter function to maintain your customization on the website – with help from the system! See the section on filters below for more information.

   ✓ Are there training implications for I&R specialists or other users? If key records have been affected, make sure to share crucial Taxonomy term name changes or other indexing modifications before they are encountered in the process of handling an inquiry and people become confused.

Understanding the Types of Updates and the Impact on Your Database

In order to properly evaluate the impact of an update on your database, you need to understand the types of changes that can occur. Some modifications are more important than others. Which those

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[2]If your vendor manages the Taxonomy update, the steps you need to take may be different. Ask your vendor what you need to do following an update to integrate the changes and additions.

are will depend, for the most part, on the terms you have already used to index records in your resource file and the new concepts you may need.

1. **New Taxonomy Terms**: The most frequent type of update is the addition of new terms – concepts not formerly included. New terms may represent new types of services not previously available (e.g., *Child Care Mental Health Consultation Programs* and *Internet Courses*) or types of services the Taxonomy has not covered before (e.g., *Pet Care Information* and *Campfire Permits*). New terms always have associated codes and definitions and <u>may</u> have one or more use references (synonyms) and see also references (if there are related terms in other parts of the Taxonomy). They may also be associated with one or more Related Concepts, cross-walked to terms in an external system or have one or more bibliographic references.

   Examples: *Prisoner Locator Services* was added as a new term in 1997. It has a code, a definition and a see also reference to *Correctional Facilities*, but no use references. *Accent Reduction Classes* is another new term created at the request of a user. It has a code, a definition, a use reference and a see also reference to *English as a Second Language*. *BIA Schools* is another new term added that same year. It is needed by I&R providers in states like New Mexico with large Native American populations. It has a code, a definition and one use reference: *Indian Schools*.

   Impact on Your Resource File: New terms don't impact the integrity of your resource file. You add them and use them if they are relevant to the contents of your database. Otherwise, you can add them and leave them deactivated. (Unless you have major space problems or no other way to deal with terms you do not wish to use, you should have the full Taxonomy in your database. You never know when you will need an inactive term!) Be sure that resource and I&R specialist staff are aware of additions you have used or plan to use. Remember that you also need to call people's attention to terms currently in the Taxonomy that you add to your starter set for the first time. While not "new" terms in the above sense, they are new to resource staff and people who use your database.

2. **New See Also References**: Sometimes we see relationships between terms in different parts of the Taxonomy that we did not notice before or a user calls our attention to an important connection. When this happens, we highlight the relationship with a new see also reference.

   Example: A new see also reference between *Childbirth Education* in the **L** section and *Parenting Education* in the **P** section was added based on a request from a subscriber. If a user is interested in one concept, it is possible s/he may be interested in the other one.

   Impact on Your Resource File: New see also references can be added without concern for the integrity of your file. They are a supportive component of the Taxonomy and help you find correct terms more easily, but not all software packages are equipped to utilize this feature.

3. **New Use References**: We are constantly reviewing other classification systems to learn alternative ways that people refer to services. The more synonyms we can add for Taxonomy terms, the more likely users are to find the concepts they are looking for.

   Examples: *Anaphylactic Reaction* was added as a new use reference for *Specific Allergies*. *Physiotherapists* was a new use reference for *Physical Therapists*. *Garden Clubs* was a new use reference for *Horticultural Societies*.

   Impact on Your Resource File: New use references can be added without concern for the integrity of your file. Like the see also references, they are a supportive component and are

important only if your software provides synonym access. (NOTE: synonym access is the ability to conduct a word search for a Taxonomy term using a synonym and have your software display the preferred term. You can type "Garden Clubs" or "Garden", for example, and your system recognizes the relationship to *Horticultural Societies* and displays that term as a selection option for use in your search.) Not all software packages have this feature.

4. **Definition Changes**: The most common type of changes to the Taxonomy are definition changes, which are made for a number of reasons:

  ✓ to describe a particular service or target population using a more authoritative source;
  ✓ to provide a more readable or accurate definition;
  ✓ to broaden the concept to cover additional relevant instances;
  ✓ to narrow the definition when included concepts are added as new terms; or
  ✓ to clarify the borderline between one concept and another.

Definitions may also be modified when more specific subsets to a concept are being added.

Examples: The definition for *Bullying Prevention* was modified to include an explicit reference to Internet bullying. The definitions for *Guardianship Assistance* and *Conservatorship Assistance* were modified to reflect the different utilizations of these concepts in different states/provinces. The definition for *Estate Planning Assistance* was modified when the category was greatly expanded and subset concepts (e.g., *Advance Medical Directives*, *Life Care Planning*) were added. Many of the definitions in the **PH** section were modified in an extremely minor way to replace the word *caretakers* with *caregivers*.

Impact on Your Resource File: While definition changes can be added without concern for the integrity of your file, it is important that both resource and referral staff are aware of them, particularly if the scope of a concept has been modified. You may want to distribute a memo enumerating changes or develop training that brings people up to date; and you may need to reindex some of your records. An effort is also being made to explain how a definition has changed. Example: "NOTE: removes reference to midwives which now has its own term" as an explanation for a modification in the definition for Registered Nurses. The explanatory notes should help you assess the impact of a particular change.

5. **Term Name Changes**: The language of human services is a constantly shifting thing. Sometimes it is important to change the wording for a term to ensure that the Taxonomy reflects current usage. If the current name for a term reflects state/provincial or regional usage and a more broadly accepted term is available, we will make a change. If a more descriptive term or one more likely to be understood by an end-user comes to our attention, we will often adopt it. Changes are also sometimes made to improve consistency. We are pretty conservative and wait until we are certain that a shift in language is enduring rather than a fad. We are also more apt to make a name change if it does not require an accompanying code change. See section 6 below for information about code changes.

Examples: *Mental Retardation* was changed to *Intellectual Disabilities* to reflect a major change in current usage. *Basic Subsistence* was changed to *Basic Needs* to clarify the concept. (Many people didn't know what "Basic Subsistence" meant.) *Snow Shoveling* was changed to *Residential Snow Shoveling* to avoid confusion with *Snow Removal* which pertains to clearing snow from public streets. *Integrated Preschools* was changed to *Inclusive Preschools* on the advice of our special education expert. *Postal Alert* was changed to *Gatekeeper Alert Programs* because the latter is inclusive of programs offered by agencies other than the post office (but *Postal Alert* was retained as a use reference for the new term to preserve access via that avenue).

Impact on Your Resource File: Term name changes have no impact on the integrity of your resource file unless they also involve a code change. They can, however, affect your resource and I&R specialist staff who may be familiar with old wording (whether they liked it or not). Be sure to alert staff to any changes they may encounter. NOTE: term name changes can have a definite and negative impact if records from one database are merged into another database and one database is using the old term name and the other the new term name. In that case, the same concept will appear as two different preferred terms and will definitely be confusing. Standardizing on the same version of the Taxonomy is critical for organizations involved in shared database projects.

6. **Code Changes**: Taxonomy code changes, unpopular as they are, become necessary for a number of reasons. If a term name change significantly modifies the alphabetical placement of a concept, (e.g., *Caskets/Urns* -- a **C** -- becomes *Interment Accessories* -- an **I** --) an accompanying code change may be necessary to preserve the alphabetical integrity of the section. Sometimes, it is necessary to restructure sections to better reflect the way a set of services is currently being delivered. Other times we need to group similar services that have been scattered throughout a section. In still other cases, we need to correct errors in the way services had been structured. Our subject area experts have been particularly good at bringing these types of things to light.

Examples: The entire *Home Maintenance Services* and *Yard Work* sections of the Taxonomy (12 terms in all at the time) were moved from the **BH** section to the **PH** section and joined with other in-home services as a result of our aging review. The new section makes a lot of sense, but the changes were extensive. When the *Estate Planning Assistance* section was developed, we needed to move several terms into it including *Will Preparation Assistance*, *Living Will Preparation Assistance* and *Durable Power of Attorney for Health Care*. All of these required code changes. Our education expert told us it was simply wrong to have *Special Education Support* services under *Guidance and Counseling* and that *Special Education Support* was the wrong wording for the concept. We created a new section called *Disabled Student Services* (the correct wording for the concept at the time) and moved affected terms over as subsets. The entire section was moved again when colleges and universities shifted to *Student Disability Services*. Other major revisions have involved a new disaster services section, elimination of *Environmental Protection* as a level II concept and the modifications in the **PF** (*Family Surrogate/Alternative Living Services*) section which, at the time, had not been reviewed or revised for 13 years. The latter section was eliminated entirely in 2006 and its subsets relocated elsewhere.

Impact on Your Resource File: Code changes have a major impact on the integrity of your resource file if you have used the codes in agency, service or program records. Most software packages don't allow you to make code changes in your Taxonomy database until you have changed the codes in the corresponding records in your resource file. If you make changes in your table without first updating the records, you run the risk of leaving "stranded" codes in your resource file and you may have trouble getting rid of them. If you have not used a term whose code has been changed, you can delete the old and add the new without a problem. Code changes, while time-consuming, are fairly straightforward. You are making a one-for-one change – replacing a single old code with a single new one. Refer to the Taxonomy Maintenance Tools section below for a description of the type of utility that automates this process and suggestions about how to make code changes if you have no utilities. Virtually all commercial software products have these utilities, but some homegrown packages do not.

7. **Deletion of Terms**: Very rarely, there is a need to delete a Taxonomy term when a type of service no longer exists, when a time-limited program has ended or when a Taxonomy

concept is being split into two or more new concepts. Terms may also be deleted (and re-added as use references) when a section is simplified; or when a higher level "gathering" term is removed and its subset terms become terms in their own right at the same level as the deleted term. When terms are deleted, the Recent Changes notation provides one or more suggestions for replacement terms and the codes for the deleted terms are included as "old codes" for the replacement terms in the Taxonomy XML file.

Examples: *Infant Stimulation* and *Civil Defense* are examples of services that simply do not exist any longer. The former has been replaced by early intervention programs and the latter by the complex emergency response system managed by the federal government (FEMA in the U.S.) and state/provincial and local offices of emergency services. *Medicare Approved Prescription Drug Discount Cards* was deleted when the Medicare Part D was approved and became available. *Adolescent Inpatient Mental Health Care* is an example of a term that was deleted when the concepts of *Children's/Adolescent Psychiatric Hospitals* and *Adolescent Inpatient Psychiatric Units* replaced it. The Recent Changes notation instructs users to select one of the new terms to replace the old one in each database entry for which the old one had been used. When the *Childbirth Education* section was revised (based on input from a subject area expert), *Bradley Classes* and *Lamaze Classes* were deleted and users instructed to use *Prepared Childbirth* instead. The old terms became use references for the new, more up-to-date one. This is an example of simplification creating a deletion. When *Eastern Religious Groups*, a level 3 term, was removed because it was no longer considered a useful "gathering term", all of the subset terms were assigned new, level 3 codes of their own giving them more appropriate status.

Impact on Your Resource File: Term deletions have a major impact on the integrity of your resource file if you have used the terms. Deletions may be more complex than simple code changes because some deletions cause one-to-many changes – one old code being replaced by two or more new ones. Before deleting any terms, do a thorough search to determine whether you have used them to index your resource file. If you have used a term that has been deleted and replaced by multiple codes, you must reindex all records containing the old code, one by one. Some of the search and replace utilities provided by software vendors have automated this process.

8. **Deletion of Use References**: Sometimes use references are deleted. This generally happens when the use reference was a more specific concept than the preferred term that is now being added as a new term, or when a use reference more appropriately belongs with another concept. In the latter case, the reference is deleted from one term and added as new to another.

    Example: *Storm Shutters* and *Storm Windows* were deleted as use references for *Weatherization* when *Storm Windows/Shutters* was added as a term in the **PH** section. *Tax Forms* was eliminated as a use reference for *Tax Assistance* when it became a term in its own right under *Tax Assistance*. *Adoption Registries* was removed as a use reference for *Adoption Evaluation/Placement* when a user noted that it was a much more appropriate reference for *Adoptive Parent/Child Search*. A note was added to the Recent Changes to explain the shift.

    Impact on Your Resource File: It is important to delete use references, especially if they are being added as Taxonomy terms in their own right. If you do not delete a use reference and then attempt to add it as a preferred term, at best your system will tell you can't and make you do the deletion first. At worst (if your system has no protection against duplicate terms), you may end up with preferred terms that are also use references. This will be very confusing to users.

9. **Deletion of See Also References**: See also references are deleted when they are misleading or unnecessary, or when a section has been restructured and the concepts referenced by them are now included in the same section and the cross reference is no longer required. This type of deletion is very rare.

Examples: The see also reference between *Sheltered Employment* and *Special Education* was removed on the advice of our special education expert. The see also reference between *Estate Planning Assistance* and *Will Preparation Assistance* was eliminated when the latter became a subset of the former.

Impact on Your Resource File: Deletion of see also references is not important to the integrity of your system. You may want to make the deletions just to stay current.

Understanding and Using Taxonomy Maintenance Tools

211 LA County provides two important tools to help you keep your Taxonomy current: a summary of changes that have occurred in the Taxonomy over time and an XML file that constitutes an extract of the entire Taxonomy database. Your software vendor should provide utilities that can be used with these files: a global search and replace utility and a Taxonomy reload utility (or a single utility that combines both functions). The global search and replace utility automates the replacement of old codes with new ones in your resource database records and then updates your Taxonomy database. It should also help you process codes that have been deleted. The Taxonomy reload utility deletes the current version of your Taxonomy and replaces it with a new one containing all additions, changes and deletions once the global search and replace process has been run. It can also be used to load the Taxonomy when you first become a subscriber. The Taxonomy updating process works differently in each of the software packages, so get the details from your vendor.

1. **Recent Changes**: The Recent Changes page provides a summary of significant modifications in the Taxonomy that have occurred over time. In order to avoid overwhelming users with unnecessary detail, changes such as typo corrections are not included. You can sort the changes by date, code, term name or type of change (new terms, changes, code changes and deletions) by clicking on the appropriate column heading; and then review a description of what has occurred. The black arrow next to the column name indicates which view is being displayed. You can limit the list of changes you see by providing a date range. If you want to see the full record for a listed change, click on the term name. Note that this function only works with Recent Changes notations with codes in the new, expanded format. Use your "back" key to return to the page you were reviewing. You can also download the following files in pdf format enabling you to print specific changes of interest to you: Changes by Date, Changes by Code and Changes by Type. Click on the file names to display the files. The Recent Changes listing is a shared file that includes modifications that affect U.S. and Canadian English versions.

Below are examples of recent changes from 2009 sorted by date beginning with the most recent (the default); and recent changes after a date range was provided. Note that the number of changes included dropped from 7,200 to a mere 70 in the latter. Once you have a smaller subset, you can again re-sort the list to display the information in whatever order you prefer, e.g., in code order. Tip: keep track of the dates you run updates and use the date range feature each time to display only changes and additions you need to process.

Recent Changes Sorted by Date

| Home | Search | Print | Download | Recent Changes | Filters | Resources | Help |

Print Change list: Changes by Date   Changes by Code   Changes by Type

Show changes between: 01/05/04 and 06/30/09   MM/DD/YY

There are 7200 changes meeting the criteria. To re-sort the list by a different column, click on the column's heading.

<< < 1 2 3 4 5 6 7 8 9 10 11 > >>

Code	Name	Description	Change Type	Change Date ▼
BD-1800.8200-255	Fresh Food	Food distribution programs that provide fruits, vegetables, baked goods, deli items, dairy products and other perishables. Some programs offer fresh food that is locally grown as a part of a movement toward locally based food sustainability. = Locally Grown Fresh Food NOTE: adds the reference to locally grown fresh food.	CHANGE	06/25/09
YF-5000.5350	People at Risk for Committing Homicide	U.S. DEFINITION: Individuals who exhibit behaviors or other risk factors that are thought to be associated with homicide. Included are a history of violence and thoughts of doing harm; threats against identifiable others; poor impulse control; an inability to delay gratification; impairment or loss of reality testing especially with delusional beliefs or command hallucinations; feelings of being controlled by an outside source; the belief that other people wish to harm him or her; the perception of rejection or humiliation at the hands of others; a history of substance abuse (current intoxication substantially heightens the risk of violence); and a past history of serious head injury, epilepsy or neurological impairment. CANADIAN DEFINITION: Individuals who exhibit behaviours or other risk factors that are thought to be associated with homicide. Included are a history of violence and thoughts of doing harm; threats against identifiable others; poor impulse control; an inability to delay gratification; impairment or loss of reality testing especially with delusional beliefs or command hallucinations; feelings of being controlled by an outside source; the belief that other people wish to harm him or her; the perception of rejection or humiliation at the hands of others; a history of substance abuse (current intoxication substantially heightens the risk of violence); and a past history of serious head injury, epilepsy or neurological impairment. See also Abusive Individuals (YP-1000), Antisocial Personalities (YF-5000.5400-030), Intermittent Explosive Disorder (YF-5000.3300-330), Paranoid Personalities (YF-5000.5400-640), Psychotic Disorders (YF-5000.5550). = Individuals Exhibiting Homicidal Ideation	NEW	06/25/09
LR-6200.8000	Sensory Integration Therapy	Programs that offer therapeutic sessions which treat individuals, usually children, who have sensory processing disorder (also known as sensory integrative dysfunction), a condition in which the brain has difficulty organizing information about one's own body and the world that is gained through the five senses (sight, hearing, taste, smell and touch). Difficulties may also affect the proprioceptive system which provides a sense of the position of the body in space and the	CHANGE	06/25/09

Recent changes for May and June, 2009

Print Change list: Changes by Date   Changes by Code   Changes by Type

Show changes between: 05/01/09 and 06/30/09   MM/DD/YY   (Clear)

There are 70 changes meeting the criteria. To re-sort the list by a different column, click on the column's heading.

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Code	Name	Description	Change Type	Change Date ▼
BD-1800.8200-255	Fresh Food	Food distribution programs that provide fruits, vegetables, baked goods, deli items, dairy products and other perishables. Some programs offer fresh food that is locally grown as a part of a movement toward locally based food sustainability. = Locally Grown Fresh Food NOTE: adds the reference to locally grown fresh food.	CHANGE	06/25/09
YF-5000.5350	People at Risk for Committing Homicide	U.S. DEFINITION: Individuals who exhibit behaviors or other risk factors that are thought to be associated with homicide. Included are a history of violence and thoughts of doing harm; threats against identifiable others; poor impulse control; an inability to delay gratification; impairment or loss of reality testing especially with delusional beliefs or command hallucinations; feelings of being controlled by an outside source; the belief that other people wish to harm him or her; the perception of rejection or humiliation at the hands of others; a history of substance abuse (current intoxication substantially heightens the risk of violence); and a past history of serious head injury, epilepsy or neurological impairment. CANADIAN DEFINITION: Individuals who exhibit behaviours or other risk factors that are thought to be associated with homicide. Included are a history of violence and thoughts of doing harm; threats against identifiable others; poor impulse control; an inability to delay gratification; impairment or loss of reality testing especially with delusional beliefs or command hallucinations; feelings of being controlled by an outside source; the belief that other people wish to harm him or her; the perception of rejection or humiliation at the hands of others; a history of substance abuse (current intoxication substantially heightens the risk of violence); and a past history of serious head injury, epilepsy or neurological impairment. See also Abusive Individuals (YP-1000), Antisocial Personalities (YF-5000.5400-030), Intermittent Explosive Disorder (YF-5000.3300-330), Paranoid Personalities (YF-5000.5400-640), Psychotic Disorders (YF-5000.5550). = Individuals Exhibiting Homicidal Ideation	NEW	06/25/09
LR-6200.8000	Sensory Integration Therapy	Programs that offer therapeutic sessions which treat individuals, usually children, who have sensory processing disorder (also known as sensory integrative dysfunction), a condition in which the brain has difficulty organizing information about one's own body and the world that is gained through the five senses (sight, hearing, taste, smell and touch). Difficulties may also affect the proprioceptive system which provides a sense of the position of the body in space and the vestibular system which provides a sense of how the body is moving even when the eyes are	CHANGE	06/25/09

2. **Download**: This function allows you to download the Taxonomy in an XML format that you can use to load the Taxonomy into your software initially and to keep your copy of the Taxonomy updated as it changes and grows. There are two options: you can access the most current version of the Taxonomy by downloading one of the files listed under "Current"; or if you need version control for any reason, you can choose one of the XML files in the archive.

Information about each of these options is provided below as are download instructions for any of the current or archived files. You can also generate and download an XML file for any of the filtered versions of the Taxonomy on the system including those you have developed and kept as private. A screenshot of the Download page is below followed by general information about XML files and "old codes". At the end of the section are suggestions for managing the update process.

| Home | Search | Print | **Download** | Recent Changes | Filters | Subscriptions | Resources | Help | Vendor Tools |

Home » Download the Taxonomy

This function allows you to download the Taxonomy in an XML format that you can use to load the Taxonomy into your software initially and to keep your copy of the Taxonomy updated over time. There are two options: you can access the most current version of the Taxonomy by downloading one of the XML files listed under "Current"; or if you need version control for any reason, you can choose one of the files in the archive. You can also download an XML version of any of the filters on the system.

Current

- Download the complete US English Taxonomy as XML
- Download the complete Canadian English Taxonomy as XML
- Download the complete Canadian French Taxonomy as XML

Archive (includes all versions)

- 2016 Archive
- 2015 Archive
- 2014 Archive
- 2013 Archive
- 2012 Archive
- 2011 Archive
- 2010 Archive
- 2009 Archive
- 2008 Archive

Download Instructions

To download a file, right click on the link then click on Save Target As... (or Save Link As... for Firefox), choose the destination, and click OK. If you simply click the link, it will display information in the browser. If you would like additional help with Downloads, please visit the Help page.

If you do not know how to import the downloaded update, contact your software vendor for further instructions. For more information about the Taxonomy XML format, click on the following:

- taxonomy.xsd: Taxonomy XML Schema
- XML Schema Documentation
- Explanation of the XML format
- Taxonomy XML snippet

Filtered Versions of the Taxonomy

The system allows you to create and download an XML version of any of the official and community filters on the system as well as any of the private filters your organization has developed. The filter XML is identical to the regular XML file except that it includes only terms that are in the selected filter.

To download a filter XML, click on custom xml page, choose a locale, mark the filter you want to select and click on OK. Follow the download instructions above to save the filter to you computer. Be sure to remove the file from the server when you are through.

About XML Files

The XML files are extract files that include all Taxonomy terms as currently structured and separate Taxonomy elements (code, term, definition, facet, comments, bibliographic references, use references, see also references, related concepts, and external systems terms). A sample from an XML download file run September 12, 2013 is below. It includes data for two terms: *Basic Needs* (B) and *Food* (BD).

```xml
<taxonomy name="Taxonomy of Human Services" releaseDate="2013-09-12T20:43:19Z" 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 utilities 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>2010-03-11</lastModifiedDate>
        <useReference>Basic Subsistence</useReference>
        <name>Food</name>
        <definition>
            Programs that seek to meet the basic nutritional needs of the community by providing access to food products.
        </definition>
        <facet>Service</facet>
        <comments/>
        <bibliographicReference/>
        <createdDate>1992-03-10</createdDate>
        <lastModifiedDate>2011-01-11</lastModifiedDate>
        <seeAlso>NL-6000</seeAlso>
        <seeAlso>PX-2400</seeAlso>
        <seeAlso>TD-1600.3200</seeAlso>
        <useReference>Food Programs</useReference>
        <externalTerm>
            <system>NTEE</system>
            <externalCode>K30</externalCode>
            <name>Food Programs</name>
        </externalTerm>
        <externalTerm>
            <system>NPC</system>
            <externalCode>K03</externalCode>
            <name>Food</name>
        </externalTerm>
        <externalTerm>
            <system>AIRS</system>
            <externalCode>FO-200</externalCode>
            <name>Food/Meals</name>
        </externalTerm>
        <externalTerm>
            <system>CAN</system>
            <externalCode>FO-200</externalCode>
            <name>Food/Meals</name>
        </externalTerm>
```

XML Sample for *Basic Needs* (B) and *Food* (BD) – U.S. English Locale

<u>About Old Codes</u>

The XML file also includes another important piece of information not mentioned in the general description above: a list of codes that were used in the system prior to a term's being moved, merged with or split to the current code. When a Taxonomy term is moved to a different place in the hierarchy, it receives a new code to mark its new position, but its old code is also assigned to the record to create a history of its previous location(s). Likewise, when a term is deleted, the system requires one or more replacement terms and the code for the deleted term becomes an old code in each of the suggested replacement term records. When Taxonomy codes were expanded to their current format, a process that was handled as a system-wide global change, all codes in the old format were added as old codes. When BD-180 became BD-1800, for example, BD-180 was included as an old code in the BD-1800 record. This was done to help the I&R software vendors make the transition to the new coding structure. Specification of old codes for a term is managed by the system based on editing actions and cannot be changed by the Taxonomy editor. Previously used codes cannot be reused, a rule that is enforced by the system.

Old codes, where they exist, appear at the bottom of the XML record. The two terms shown as examples in the XML file snippet above have no old codes because the terms have never been moved and no deleted terms have referenced them as replacement candidates. The screenshot below is taken from the XML record for *Utility Disconnection Protection* which has four old codes: BH-890.800 (old format) and BH-8900.8000 (new format for that code), BR-900.800 and BV-8900.8000. The term has been moved three times. It was originally in a BR section that no longer exists, was changed to BH-890.800 and lived there long enough to be changed by the system to BH-8900.8000 when the coding structure was expanded. It had one more stop (BV-8900.8000) before moving to its current location (BV-8900.9220.)

```
<oldCode>BH-890.800</oldCode>
<oldCode>BH-8900.8000</oldCode>
<oldCode>BR-900.800</oldCode>
<oldCode>BV-8900.8000</oldCode>
```

Old Codes for *Utility Disconnection Protection*

The old codes are used by software systems during the update process to pinpoint changes that need to be made in the I&R database in situations where a term carrying one of the deleted or changed codes has been used as an index term. If any of the old codes for the above term were found in a subscriber's resource database, the system would be able to identify "BV-8900.9220" as the code for the current term and make a correct replacement in the database as part of the update process. Code changes and one-to-one deletions can be made by the system without subscriber involvement. Terms that have been deleted and have more than one possible replacement, however, require some type of process that allows the subscriber to choose replacement terms, record by record. The process can be automated (usually an interactive session in which the system presents records indexed using the deleted term and asks the specialist to select a replacement option from a list displayed by the system or to select one of the terms as a global replacement in all of the affected records); or manual where the specialist uses a printed list of "exceptions" generated by the computer to identify records that need modification and make the changes.

Current Taxonomy in XML Format

Each time the Taxonomy website is updated by the Taxonomy editor, the system creates new XML files for each of the three locales and make them available on this page (see below). Depending on where you are located, you will want to choose either the U.S. English or the Canadian English version of the XML file. A French Canadian version is also available. Systems in Canada with resources in both English and French will use both of the Canadian files.

Taxonomy Archive

Older versions of the Taxonomy XML files have been archived to enable organizations that are part of a statewide or province-wide collaborative (or are otherwise sharing their data) to standardize around the same version of the Taxonomy prior to contributing their updated records to the combined file. On the first of each month, a snapshot is taken of the most recent "current" XML files and archived under the previous month's name. On August 1st, for example, the current XML files are copied and archived as the July archive for that year.

Download Instructions

To download one of the current or archived Taxonomy XML files, right click on the link then click on Save Target As… (or Save Link As… for Firefox), choose the destination, and click OK. If you simply click the link, the system will display the information in your browser.

If you are unsure about which file you need to download, or you don't know where to put the file or how to import the downloaded update, contact your software vendor for further instructions. For more information about the Taxonomy XML format, click on the following:

- taxonomy.xsd: Taxonomy XML Schema
- XML Schema Documentation
- Explanation of the XML format
- Taxonomy XML snippet

Filtered Versions of the Taxonomy

The system also allows you to create and download an XML version of any of the official and community filters on the system as well as any of the private filters your organization has developed. (For more information on Filters, refer to the Filters section of this document). The filter XML is identical to the regular XML file except that it includes only terms that are active the selected filter.

To download a filter XML, click on custom xml page, choose a locale, mark the filter you want to select and click on "OK". Follow the download instructions above to save the filter to you computer. Be sure to remove the file from the server when you are through. Below is a screenshot of the custom XML selection page followed by the message you see while the file is generating. Ask your software vendor if there are utilities that you can use to update the active/inactive flags in your system using data in the filter XML file or ways to use the filter to structure the contents of a directory or resources on your website focus page or portal.

Custom XML File Selection Form

Custom XML File Download Message

3. **If You Don't Have Taxonomy Maintenance Tools**: If your software package lacks Taxonomy maintenance utilities, you will have to make the changes yourself based on instructions in the Recent Changes documents. The only tricky part is handling code changes and deletions. You can try the following:

   ✓ For each Taxonomy term whose code is being changed, search your database and make a list of all records in which the term has been used.
   ✓ Go into your Taxonomy file and add "-Old" to the Taxonomy term name. This allows you to enter the term under the new code if the name is not also being changed. (Your software should not allow you to have two Taxonomy terms with identical names).
   ✓ Create new entries in your Taxonomy database for the new codes. If the code for *Mobile Canteens* is being changed from **BD-1800.8200-330** to **TH-2600.6450-550**, you will have two entries: **BD-1800.8200-330** for *Mobile Canteens-Old* and **TH-2600.6450-550** for *Mobile Canteens*. If there are higher level terms above the new code, you will also have to add those term to provide for full branching. Before you can add the new code for *Mobile Canteens*, for example, you need to add *Disaster Services* (**TH**), *Disaster Relief Services* (**TH-2600**) and *Post-Disaster Food Services* (**TH-2600.6450**), the new higher level terms under *Mobile Canteens* is now located.
   ✓ Go into each of the entries in your database containing the old term and change it to the new term.
   ✓ Run a search (the one with the -Old suffix) again to ensure that all entries have been converted.
   ✓ Delete the old term.

Having a Plan for Local Modifications

Whether you are using a software utility or making changes in your Taxonomy on a term by term basis, it is very important for you to keep track of any local modifications you have made in the Taxonomy. You may, for example, have changed the term name for code **NL-1000.8500** from *TANF* to the name for the program that has been adopted by your state, or changed the definition to more closely reflect your state's version of the program. If you have added local terms or modified any of the information received from 211 LA County via the download files and reload the Taxonomy using the XML extract file, your local changes will be overwritten. Unless your software vendor has provided separate fields for local changes and a way to identify local terms, you either need to extract your changes and reload them following the XML updating process (if you have a utility for this purpose) or re-enter your changes and additions manually. If there are no dedicated local fields, ask your software vendor whether your system has an extract/reload utility that will handle selected information. In the case of term names, your software likely has a separate display name field that you can use for this purpose, but other types of changes are subject to the problem. In the vast majority of cases, you should submit suggestions for additions and changes for discussion by the Taxonomy Community on the AIRS Networker. The fewer the local changes you need to manage, the easier your comprehensive updating task becomes.

The other settings you want to preserve are the active/inactive settings for individual Taxonomy terms (your customization). If you have the ability to de-activate terms you do not wish to see, confirm with your software vendor that these settings will not be affected when you run the Taxonomy maintenance utilities that comes with your software.

Taxonomy Customization and the Filters Function

The most difficult and time-consuming part of implementing the Taxonomy in a database is going through the process of de-activating terms in the Taxonomy you don't want to use. De-activated terms become invisible to resource staff as well as to I&R specialists creating a much more user-friendly display. Most software packages provide a mechanism for customization, but none of them streamline the process.

Creating Filtered Sets: The Filters function on the website allows you to create, share and maintain customized versions of the Taxonomy by removing terms you do not wish to include in your filtered set. 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 de-activate the level 1 and 2 supporting terms. You can remove an entire section by clicking on the level 1 category or you can go into a section and remove terms either one-by-one or in groups. Removing a higher level term automatically removes all of its subsets. You also have the option of removing the children of a term which saves you the effort of clicking on each child term separately to remove it; and you can re-include child terms removed in this fashion selectively if you only want one or two. The screen shot below illustrates some of these options.

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

Some filters are "official" (developed by the Taxonomy editor in collaboration 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 and, best of all, can be cloned and used as a starting point for a new filter. If you are daunted by the prospect of reviewing the entire Taxonomy, simply review the existing filters and choose the one that looks best to you. You can go into the copy, add or remove additional terms and then save the new customized set under whatever name you choose.

If you are part of a database collaborative, you can have two filtered sets: one for the collaborative and a second one for your own database that reflects the needs of your community. Customized sets for database collaboratives tend to be less detailed than those the larger organizations in the group develop and use locally.

More good news: when the 211 Taxonomy website is updated, the system helps 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 by the Manage Filter function are flagged for your review. Be sure to check your filter after each update to ensure that you review and confirm the decisions 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 to the filter.

Printing Filtered Sets: You can use the Custom Reports function to create a printed report in a variety of formats using any of the community or official filters (or your own private filter) as a term selection criterion. Simply go to the Print tab, choose "Filtered" under "Custom Reports", select the filter you wish to use, and mark your locale preference (U.S English, Canadian English or Canadian French), sort preference (by code or by name), the fields you wish to include and the level within the Taxonomy you want the report to reflect. You can use this option to create and print a "mini Taxonomy" with definitions and other information.

Alternatively, if you prefer an "at-a glance" view of the hierarchical structure and contents of your filter, choose "Filter Outline Report" under "Custom Reports", mark the locale, select the filter you want to print and specify whether you want the regular "Outline" or a "Highlighted Starter Set" which 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 latter can be a very useful reference tool for your staff. A snippet of 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**

Searching Using Filtered Sets: You can also set the search function to include only terms in a filtered set. Simply click on (change) at the top of any of the pages next to "Viewing: US English Taxonomy" (or "Viewing: Canadian English Taxonomy" or "Viewing: Canadian French Taxonomy") and mark the filter you want to employ. All of the searches are programmed to conform to the contents of the filter you have chosen. Remember to change the setting back to "none". Like your locale choice, filter selections will persist until they are altered. NOTE: having a filter "on" for searching purposes can slow the search process.

Downloading Filtered Sets: XML versions of the filtered sets are also available on an "on demand" basis. You can develop your filter, download it in XML format and, when the software vendors have written an appropriate utility, you will be able to import the XML and update the customization in your software accordingly. This can be done from within the filter function or from the Download page.

For more extensive information about how to use the Filters function, refer to the article in the Library by Georgia Sales and Dick Manikowski entitled "Using Filters to Create and Manage Taxonomy Subsets for a Resource Database"; or access the Manage Filters Help page.