

CRITERIA FOR FULL INSTALLATION OF THE AIRS¹/INFO LINE² TAXONOMY³ IN AN I&R SOFTWARE PACKAGE

Support for Implementation of the Full Taxonomy

1. Does the package accommodate all levels of the *Taxonomy*?
2. Does the package allow users⁴ to set the word search of *Taxonomy* terms, including both standard and user-added use references, as the default search for services? This includes searches by end users and during data entry.

Customization Support

1. Does the package allow the user to deactivate terms they do not wish to use?
2. Does the package have a mechanism for showing which active terms have actually been used? Options include:
 - ✓ Displaying only terms which have been used (suppressing unused terms); or
 - ✓ Indicating (by use of a designated character such as "+" or different colors) which terms have been used.
3. Does the package allow users to print a hierarchical outline of active and/or used terms or other *Taxonomy* reports for in-house reference purposes?
4. Does the package allow the user to add their own see also references and use references?
5. Does the package allow the user to store the original term name or definition of user-modified term names or definitions? An option would be to use display fields and original fields.
6. Does the package allow the user to generate their own Related Concepts lists (formerly appendices) of *Taxonomy* terms?
7. Does the package allow the user to attach custom "messages" to some *Taxonomy* terms and then set those messages to "pop up" when those terms are selected during searches? EXAMPLE: All *Taxonomy* terms related to child abuse services could have a pop-up reminder to end users about their legal obligation to report suspected child abuse.
8. Since a starter *Taxonomy* is anticipated, does the package allow the option to install the *Taxonomy* with some terms flagged as inactive and allow later activation of some or all of these terms?

Search Interfaces for Data Entry and End User Service Searches

1. Does the package allow users to search the *Taxonomy* level by level (drill down searches)? (The system displays all level 1 terms and users select the term they wish to expand. The system then displays all the level 2 terms under the selected level 1 term and users select the term they wish to expand. The system then displays all level 3, 4 and 5 terms under the selected level 2 term.)
2. Does the package allow users to do a word search of *Taxonomy* terms? Options include:
 - ✓ Allowing users to type a word or phrase and the system displays all terms including that word or phrase.
 - ✓ Displaying an alphabetical pick list of active terms.

¹ Alliance of Information and Referral Systems (www.airs.org)

² 211 LA County (Previously INFO LINE of Los Angeles) (www.infoline-la.org)

³ A Taxonomy of Human Services: A Conceptual Framework with Standardized Terminology and Definitions for the Field, © Information and Referral Federation of Los Angeles County, Inc. All rights reserved.

⁴ In this document "the user" refers to an option set as a policy decision affecting all users at an organization; "users" refers to any person using the software.

In data entry using either of the above searches, allowing users to display deactivated terms with their deactivated flag indicated.

3. Does the word search of the Taxonomy include the use references or synonyms for all active terms? When users type a word or phrase, the system displays all the Taxonomy terms including that word or phrase and all of the active term use references (only for terms not otherwise selected). Duplicates should be eliminated.
4. Does the word search of the *Taxonomy* include all inactive terms as use references or synonyms for active terms, pointing to the first related higher level term that is active?
5. Does the package allow users to display *Taxonomy* terms that are associated with the target groups and/or problems that form the Related Concepts lists (formerly appendices) at the back of the book or similar ones generated by the user? Options include:
 - ✓ Present the Related Concepts search as a separate feature that allows users to display Related Concepts titles (e.g., Disabled People, Disaster Response, Pregnancy, Seniors), select a title and display *Taxonomy* terms associated with the appendix.
 - ✓ Present the Related Concepts search as a feature of the word search. When users do a word search, if any term is associated with a Related Concepts title, the title appears in a separate field. Users can review the pick list of terms generated by the search (as above) or can click on the Related Concepts name and the system will display the full list of terms associated with the list. EXAMPLE: The user might search on the word "Homeless". The system displays "Homeless Shelter", "Homeless Shelter Pickup Sites" and other terms/use references containing the word "Homeless". The Related Concepts title "Homeless" would also be displayed. When the user clicks on the latter, all services typically associated with people who are homeless (e.g., "Delousing", "Hairdressing/Nail Care", Shaving Utensils", "Soup Kitchens") would be displayed, not just those containing the word "homeless".
6. Does the package allow users to select *Taxonomy* terms from both standard and user-generated Related Concepts lists (formerly appendices)?
7. Does the package allow users to search the *Taxonomy* by code or partial code? (Users type a "B" and the system displays all of the basic needs categories; users type "BD" and the system displays all of the Food categories.)
8. Does the package allow users the option to move from the alphabetical display generated by a word search to the hierarchical display and return to the original display when they indicate a term? This allows users to examine the place and level of a particular term within the hierarchy, showing all higher level and same level terms, to confirm that they are selecting the proper term. Does the package allow users to return to the their place in the alphabetical display?
9. Does the package allow data entry users to select a term from any of the above displays to attach to a record? Does the package allow end users to select a term for searching from any of the above displays?
10. Does the package allow users to display definitions for terms during both data entry and end user searches?
11. Does the package allow users to display see also references for active terms during data entry and display see also references for terms in use during end user searches?

Support for End Users' Service Searches Only

1. Does the package allow end users to specify that they want to search for all records indexed to the selected term and all of the lower level terms below it? EXAMPLE: The user selects Food Pantries (BD-180.200) and the system searches for records indexed to that term and includes records indexed to

Food Lines (BD-180.200-20), Occasional Emergency Food Assistance (BD-180.200-62) and Ongoing Emergency Food Assistance (BD-180.200-64).

2. Does the package allow end users to search for organizations that provide multiple services? EXAMPLE: If a caller needs both food and clothing, will the package allow users to specify both services and only retrieve records for agencies that provide both?
3. Does the package allow end users an option to see the *Taxonomy* terms that are attached to a specific program without the option to edit the terms? This allows end users to check on the coding of services to generate suggestions for data entry staff.

Support for Data Entry Only

1. During data entry, does the package allow users to attach multiple terms to a service or a term to multiple services within a single data entry screen? This facilitates ease of input.
2. During data entry, does the package allow users to copy multiple *Taxonomy* terms from one service record and attach (paste) them to other service records? This facilitates uniformity and ease of input.
3. Does the package allow users to display, during data entry, the programs already attached to a specific *Taxonomy* term?
4. During data entry, does the package allow users to sort programs by criteria outside the *Taxonomy*, view a list of the selected programs, and then click on each one to see attached *Taxonomy* terms and add or delete? EXAMPLE: To attach the new term Home Rehabilitation/Repair Services, users could search for the words "housing rehab" or "home rehab" in service descriptions or service names in the database of services. Users should be able to view definitions and the hierarchy during this process.

Conversion Support

1. Does the package allow the user to generate crosswalks from the *Taxonomy* to other service classification systems?
2. Does the package allow users to utilize a crosswalk from their old classification structure to the *Taxonomy* as a means of automating the conversion process?

Updating Support

1. Does the package support both interim or partial updates and systematic scheduled updates to codes, terms, definitions, use references and see also references and relationships to Related Concepts lists (formerly appendices)?
2. Does the package provide an extract/reload utility that allows the user to maintain customized or modified terms, definitions, see also references, use references, and user-generated Related Concepts lists (formerly appendices), as well as the standard ones, when the user updates the *Taxonomy*?
3. Does the package provide a global search and replace utility that refers to the history file, thus allowing the user to easily integrate *Taxonomy* updates?
4. Does the package provide a *Taxonomy* reload utility to delete the current version and replace it with a new one containing all additions, changes and deletions including those to see also references, use references, definitions and Related Concepts lists? Does the utility preserve the active/inactive flags for terms?
5. Does the package automatically reload the customized or modified terms, definitions, see also references, use references, and user-generated Related Concepts lists (formerly appendices), as well as the standard ones, after the user has updated the *Taxonomy*? If a customization cannot be reloaded

automatically because the term it references has changed, does the utility report on the item and the old term?

Statistical Reporting Support

1. Does the package allow reports on the problems or needs of inquirers classified by *Taxonomy* codes and terms? Options include:
 - ✓ Allowing the user to define a list of problems or needs and hook *Taxonomy* terms to them
 - ✓ Allowing the user to select *Taxonomy* terms as problem or need categories.

2. Does the package allow the user to define a summary level of terms in the *Taxonomy* for reporting purposes? (A level 5 term such as “Occasional Emergency Food Assistance” might have the level 3 term “Emergency Food” or even the level 2 term “Food” as its summary level for reports. Searches done at a very specific level could then be reported out more broadly. This function allows users to define their own level for reporting and change it as needed.)

GLOSSARY FOR TAXONOMY SOFTWARE CRITERIA

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

Appendices: Several lists of *Taxonomy* terms associated with target groups and/or problems that may or may not contain the exact word entered in a word search. These appendices in paper editions of the *Taxonomy* are referred to as Related Concepts lists in electronic versions. Standard Related Concepts lists are part of the nationally distributed *Taxonomy*. The user may also create Related Concepts lists. See Search Interfaces, Item 5.

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

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

Customized Data Extract/Reload Utility: A software feature that removes all terms customized or modified by the user, plus their see also references, use references, user-generated Related Concepts lists (formerly appendices), or definitions prior to incorporating an update to the *Taxonomy* and reintegrates them into a user's database at the end of the updating process. See also: **Reload Utility**.

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

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

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

Global Search and Replace: A software feature that automates the replacement of old *Taxonomy* codes with new ones in resource database records. This utility looks for occurrences of old *Taxonomy* terms or codes in the user's database, refers to a history file to determine the new term or code, and replaces the old term or code with the new term or code in all occurrences. If a term or code has been deleted and there is only one replacement, the utility processes the deletion as a code change. If the term or code has been deleted and has more than one replacement, the utility displays alternative terms or codes and allows the user to make a substitution for each service indexed with the old code until all deleted items have been replaced. This process is completed before the extract/reload utility reloads the updated *Taxonomy* from an ASCII delimited file or database format and reintegrates the customized or modified terms, see also references, use references, user-generated Related Concepts lists or definitions.

Hierarchical Display: Shows the interrelationships among *Taxonomy* terms through use of codes that identify ten major service sections, plus target populations. Each section is broken down into 5 tiers getting more specific from level to level. Thus for any *Taxonomy* term from any level, the hierarchy can display all parent, sibling and child terms. The codes that determine the hierarchy may or may not be visible to end users.

History File: An electronic file containing *Taxonomy* code changes and deletions and, for the later, provides alternative suggested codes.

Human Services: The activities of human services professionals which help people to become more self-sufficient, sustain independence, strengthen family relationships, support personal and social development and ensure the well-being of individuals, families, groups and communities. Specific human services include ensuring that people have access to adequate food, shelter, clothing and transportation; financial resources to meet their needs; consumer education and decision support; criminal justice or legal services; education and employment; health and mental health care including substance abuse services; and environmental protection; both routinely and in times of disaster or other emergencies. Human services also facilitate the capabilities of people to care for children or other dependents; ensure that protective services are available to those who are vulnerable; provide for the support of older adults and people with disabilities; offer social, faith-based, and leisure time activities; provide for the cultural enrichment of the community; and ensure that people have the information they need to fully participate in community life.^{5[4]}

I&R (Information and Referral) Software Package: The programs, routines, and symbolic languages that control the functioning of hardware and direct the operations that allow I&R users to link people in need of human services with appropriate service providers who can meet their needs. Information and Referral software may be designed for use on personal computers, over Local Area or Wide Area Networks (LANS or WANS), or on the internet.

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

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

Referral Giving: The process of assessing the needs of the inquirer, evaluating appropriate resources, indicating organizations capable of meeting those needs, helping inquirers for whom services are unavailable by locating alternative resources, and, when necessary, actively participating in linking the inquirer to needed services by scheduling appointments, three-way calling, or negotiating for the inquirer. ^{6[5]}

Reload Utility: A software feature that erases the old version of the *Taxonomy* and loads an updated version containing all additions, changes and deletions from an ASCII delimited file or database format. The reload utility is used after all services have been reclassified using a global search and replace utility. The reload utility insures that there are no overlooked or orphan terms, codes, etc. within the master *Taxonomy* files in a database. See also: **Customized Data Extract/Reload Utility.**

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

Starter Taxonomy: The *Taxonomy* with a standard but relatively small set of terms active and the remainder inactive. This offers a classification system appropriate for smaller databases or organizations with few staff available for database maintenance. The Starter *Taxonomy* has not yet been defined.

Taxonomy: "A Taxonomy of Human Services: A Conceptual Framework with Standardized Terminology and Definitions for the Field" copyrighted by Info Line of Los Angeles and published jointly with the Alliance

of Information and Referral Systems. The *Taxonomy* has been issued in three book editions with intervening paper supplements, each with an ASCII file of all codes, terms, definitions, use and see also references and Related Concepts lists (formerly appendices). The *Taxonomy* will soon be available as an annual subscription with updates available for download from a web site. The *Taxonomy* is organized into ten basic service categories plus target populations. Within each basic category, services are defined with increasing degrees of specificity in a hierarchical structure of up to five tiers.

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

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

Taxonomy Term Definition: A description of the primary characteristics of a particular type of service. Each preferred term in the *Taxonomy* has a definition. They are descriptive of the way services are provided not prescriptive for what services ought to be.

Unused Term: A *Taxonomy* term with its associated codes, definitions, use and see also references which has not been flagged as deactivated within a database but has not been attached to any services. Unused terms should be available for use in data entry but not be seen by end users.

Update: The process of adding new *Taxonomy* terms with their associated codes, definitions, use and see also references and relationship(s) to Related Concepts lists (formerly appendices); deleting terms no longer approved with their associated codes, definitions, use and see also references and relationship(s) to Related Concepts lists; amending terms and definitions; adding new use and see also references to existing terms and then applying the changes to the services classified in a database. Updates are issued by Info Line of Los Angeles and are available to those who subscribe to the *Taxonomy*.

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

Word Search: Locating a word or partial word within a list of *Taxonomy* terms and use references. The word search in electronic versions of the *Taxonomy* corresponds to the permuted index in print versions.