

2-1-1 California iCarol Style Guide

July 2012



Adapted from the Alliance of Information and Referral Systems (AIRS) Style Guide

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SECTION 1

SCOPE AND BENEFITS OF THE 2-1-1 CALIFORNIA iCAROL STYLE GUIDE

- The 2-1-1 CA iCarol Style Guide was created with the goal of supporting and promoting quality and consistency in the resource databases of providers in the 2-1-1 California Network.
- Variations in style make data appear disorganized and confusing. Even if the information is correct, the overall look can diminish its credibility. In addition to the benefits of maintaining consistent style within each individual database, maintaining consistency across the Network will make mutual support in times of disaster and opportunities to collect information across databases for public view more successful.
- Because the Network has chosen iCarol as the state's recommended I&R software product, this Style Guide assumes the use of the iCarol database product.
- This Style Guide was developed from the AIRS Style Guide Template, with adjustments made by a team of 2-1-1 staff from services across California. Much of the language and structure of this document are taken directly from the AIRS Template.
- The 2-1-1 California iCarol Style Guide is a collection of recommended best practices rather than a set of prescriptive (or absolute) solutions and as such may change over time.
- While this Guide was developed with the expectation that it would be flexible enough to be used in various 2-1-1 settings, each 2-1-1 agency will likely still require additions to this document to cover unique local needs and usage.

PRINCIPLES OF 2-1-1 CALIFORNIA iCAROL STYLE GUIDE

The following factors are all influences on style issues and decisions, and are listed in an approximate order of importance. All of these factors are important but sometimes they might also be contradictory. For example, a desire for brevity may be countered by the need for clarity of meaning.

- Clarity.
- Accessibility. Resource information should be understandable to as broad a section of the public as possible. Information should not be only comprehended by people with higher literacy levels.
- Ease of training. Training needs must be recognized. The more complicated an option, the harder it will be for people to understand and implement.
- Brevity/concision.
- Naturalness of language.
- Accuracy in the sense of containing enough breadth and depth of information for an informed decision. It is possible to be too concise.
- Consistency. But consistency for a purpose.

- Relevance. Sometimes a “lesser” field may not be worth a vast amount of investment of time and effort to attain perfection.
- Consensus does not mean correctness. Even if a clear majority of existing style guides have made a particular decision about a data element, it does not necessarily mean that this must be deemed as the best solution.

DATA ELEMENTS/DATA FIELDS

These two terms are sometimes used (even in this document) interchangeably. But they are different in meaning.

Data elements refer to specific kinds of information (for example, a “mailing address”) while **data fields** refer to what have been decided as the “containers” in a specific database for one or more specific types of information.

In some cases that “container” (that is, a data field) might contain a single data element (for example, when the data element “mailing address” is contained in the data field “Mailing Address”). In other cases, a single data field may contain more than one data element (for example, the data elements “service capacity” and “source of funds” may both be included within a data field called “Service Description”).

The AIRS Standards identify “data elements” (whether required or recommended) and leaves decisions as to how that information is incorporated into a database to the individual I&R agency based usually on the database design of their I&R software. This document includes recommendations for which iCarol data field should be used for each data element.

I&R DATABASE STRUCTURES

The AIRS XML Schema is used to facilitate data exchange, particularly among users of different I&R software programs. An I&R provider could export their Resource Data using this format if their software supports this option. The export creates an XML (Extensible Markup Language) document which contains information structured in a certain way so that data can be imported with greater ease than if an XML Schema were not used. The AIRS XML Schema defines the elements that are expected from a resource database and the format and/or content of the information. The AIRS XML Schema is structured so that each Agency (usually defined as an independent organization) has at least one Site (a physical location which provides a service), and at least one SiteService (a way to link a service or program to a site). With AIRS XSD 3.0 all Services are tied to the physical location where it is offered. Therefore if an Agency has two sites that offer the same service, in AIRS XSD 3.0 the format would be one Agency with two Sites and each Site would have SiteService that described the service.

iCarol offers the ability to have various structures, including anywhere from a ‘flat’ one level database to a four level database. This Guide recommends either a three or four level database and is structured to support either three or four level systems.

DATABASE MANAGEMENT GUIDANCE – ANNUAL UPDATES

All 2-1-1 providers should update each entry in their database at least one time each year.

DATABASE MANAGEMENT GUIDANCE – INFORMATION NOT PROVIDED BY AGENCIES

Information for all required fields must be collected from agencies. However, if an organization is unable to provide information for a specific area, recommended 'place holder' language until that information can be gathered is:

"No information has been provided by Agency"

DATABASE MANAGEMENT GUIDANCE – TAXONOMY

It is strongly recommended that all 2-1-1 providers adopting this Guide also establish a customized taxonomy for their database. This means that, at minimum, each provider has established a limited set of all available taxonomy terms that the service will use.

SECTION 2 - DATA STRUCTURE: AGENCY

DEFINITION

An agency is a legally recognized organization, either incorporated or a division of government, that delivers services. An agency may also be an unincorporated group that offers, for example, a food pantry or support group. The agency is the main location of the resource where the administrative functions occur, where the organization's director is generally housed and where it is licensed for business. An agency may or may not deliver direct services from this location. On occasions, I&R services may choose to designate a middle level of the organization as the agency. For example, a city Department of Human Services may offer hundreds of services but is often recognized by the names of its component programs: Social Services, Health Department, etc. It is acceptable to use those components as agencies as long as their relationship to the larger Department of Human Services is acknowledged in the description or by the way the database is structured.

DATA ELEMENT: AGENCY – UNIQUE ID NUMBER

| AIRS Standards Name | AIRS Standards Requirement | AIRS XSD Name | iCarol field name |
|----------------------------|-----------------------------------|----------------------|--------------------------|
| Unique ID Number | *Required* | Key | Resource Num |

DEFINITION

The record ID number is a unique numerical code that is affixed to every single record within a resource database (whether that is an agency record, a site record or a program record). Although the organization's name might change, its unique number will remain the same.

PREFERRED STYLE

0164125 (in iCarol)
1257914

ADDITIONAL INFORMATION

iCarol automatically assigns a seven digit number (0000001 to 9999999) to each newly created database record.

DATA ELEMENT: AGENCY – RECORD OWNERSHIP CODE

| AIRS Standards Name | AIRS Standards Requirement | AIRS XSD Name | iCarol field name |
|-----------------------|----------------------------|---------------|-------------------|
| Record Ownership Code | *Required* | Record Owner | OrgNum |

DEFINITION

A code that identifies the organization responsible for maintaining the record. It is used to facilitate combination, in a single consolidated database, of records maintained by different organizations.

PREFERRED STYLE

0000-9999 (in iCarol)

ADDITIONAL INFORMATION

Once established, iCarol automatically inserts a four digit organizational ownership code into every newly created database record. This code allows records to be identified according to ‘maintaining’ or ‘record owning’ agency.

DATA ELEMENT: AGENCY – AGENCY NAME

| AIRS Standards Name | AIRS Standards Requirement | AIRS XSD Name | iCarol field name |
|---------------------|----------------------------|---------------|-------------------|
| Agency Name | *Required* | Name | Agency Name |

DEFINITION

This is the full official or formal name of the organization that provides the programs/services that are being included within the resource database. Names under which the organization is more commonly known or is “doing business as” (such as using YWCA for Young Women’s Christian Association) should be entered in the AKA field.

PREFERRED STYLE EXAMPLES

- Abacus Child Care Center
- Anytown Parks and Recreation Department
- Big Brothers and Big Sisters of Anytown
- Burton D Morgan Foundation
- California Department of Health
- California Department of Labor

Evergreen Youth Services
Gathering Place
Saint Jude's Emergency Shelter
Saint Vincent de Paul Society
Yellow County Social Services Department
YMCA Anytown

ADDITIONAL INFORMATION

- Strive to use full names without abbreviations and ampersands (for example, Anytown Parks and Recreation Department instead of Anytown Parks & Rec. Dept.), unless they are used by the agency (for example, Hightown Children & Youth Clinic).
- You may understand the abbreviations but a person who is not a native English speaker may not.
- Avoid beginning an organization name with the word "The" (such as The Gathering Place). A failure to follow this principle tends to create hard-to-follow alphabetical listings with dozens of agencies called "The this ..." and "The that ...".
- Sometimes the official name may make that organization harder to find in a listing of alphabetical names. For example, the official name may be Anytown Big Brothers but most users would search for – and expect to find – the name under Big Brothers so it may be styled accordingly.
- Similarly, the official name may comprise legal words or phrases (such as "Inc") that are not relevant and not part of the everyday name. When this is the case, you should generally omit them. Although there may be occasions when it makes better sense to include, such as for an organization called "Food Inc".)
- Use apostrophes in the same manner as the agency but use a version without the apostrophe in the AKA field (for example, Saint Jude's Emergency Shelter with Saint Judes Emergency Shelter as an AKA). This is in order to get around occasional limitations of online searching when it comes to apostrophes.
- When naming government organizations, use the same structure for divisions of the same level of government (for example, Santa Clara County Public Health Department and Santa Clara County Social Services Department rather than the Santa Clara County Public Health Department and Social Services Department – Santa Clara County)
As a general rule, always structure these records with the level of jurisdiction listed first (for example, Blue State Department of Motor Vehicles or Red County Sheriff's Department)
Run a search and see how all of those government records look when listed in alphabetical order. They should all be grouped together with a similar look/appearance.
- If the common name is an abbreviation, omit the punctuation from the official name (for example, ARC rather than A.R.C.). This holds true if the agency or the site name is taken from someone's initial (for example, CJ Correctional Facility rather than C.J. Correctional Facility).
- An organization name can sometimes be styled on two or three levels such as:
 - Any County. Mental Health Department. Outpatient Services (which in itself may turn out to have 4-5 separate sites, each providing several programs)
 - Any County. Voter Registration Office

Or perhaps ...:

- Any County -- Mental Health Department -- Outpatient Services (which in itself may turn out to have 4-5 separate sites)
- Any County -- Voter Registration Office

Or even ...:

Blue County Mental Health Department – Outpatient Services

Blue County Voter Registration Office

In these cases, maintaining a consistency of approach is very important.

- Do not abbreviate Street, Avenue, Boulevard, Mount, Road, etc. when these words appear in organization names (for example, Spruce Street Community Center).
- Do not use abbreviations for geographic areas (for example, CA Department of Labor; US Postal Service). Spell out the name fully if space permits.
- If an abbreviation is a well-known part of a name and the name would otherwise seem “odd” to anyone in the community, then the abbreviated version should be preferred.
- iCarol has a limit of 260 characters in this field.
- Note that there may be exceptions to these “style preferences” in the area of organization names.

DATA ELEMENT: AGENCY – AKA (ALSO KNOWN AS) NAMES

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|---------------------------|----------------------------|--------------------|---------------|--------------------------------|
| AKA (Also Known As) Names | *Required* | Agency/AKA | AKA | Search hints OR Alternate Name |

DEFINITION

An AKA (Also Known As) is a name other than the legal name by which an organization is known. Included are AKAs (or aliases) for the agency name, site name or program name, or names that are acronyms, former names, popular names or other alternative names. An AKA may also be any type of name under which the organization, site or program might reasonably be searched by a user.

AIRS XML COMPONENTS

| |
|---------------|
| AIRS XSD Name |
| Name |
| Confidential |
| Description |

PREFERRED STYLE EXAMPLES

Anytown YMCA

Big Sisters Anytown
 EYS
 Jude’s Place
 Saint Jude’s Emergency Shelter
 St. Vincent de Paul Society

ADDITIONAL INFORMATION

The AKA can also be used to anticipate variations in spelling conventions that might be tried by users. For example, if the organization name is Saint Bartholomew’s Catholic Church, then St. Bartholomew’s Church and Saint Bart’s might be added as AKAs.

Former names should be maintained as AKAs for several years, as not all members of the public might be aware of a name change and if they are asking for information under the old name, an I&R Specialist should be able to find it regardless.

The AKAs can sometimes also be used to “flip” the preferred name around if appropriate. For example, if a decision has been made to use YWCA Anytown as the preferred organization name, then Anytown YWCA could be used as an AKA.

Please note that, in iCarol, the AKA field is presented to viewers, while Search Hints field is not, so intentional misspellings of a name should go into Search Hints.

DATA ELEMENT: AGENCY/ PHONE NUMBER(S) INCLUDING EXTENSIONS, PHONE TYPES AND PHONE FUNCTIONS

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|---|-----------------------------------|---------------------------|----------------------|--|
| Phone Number(s) including Extensions, Phone Types and Phone Functions | *Required* | Agency/Phone | Phone | Agency Phone Numbers section> Phone Name, Phone Number & Phone Descriptions fields |

DEFINITION

The phone number(s) through which a particular site or a service operated by that site can be reached. Phone data include phone numbers, extensions, phone types (e.g., Voice, TTY/TDD), and phone functions (e.g., administration, intake).

| |
|----------------------|
| AIRS XSD Name |
| Phone Number |
| Reason Withheld |
| Extension |
| Description |
| Type |
| Function |
| Toll Free |
| Confidential |

PHONE NUMBERS

PREFERRED STYLE EXAMPLES

650-467-9836

800-453-7669

2-1-1

866-546-3652

9-1-1

714-156-8635

No phone access available

ADDITIONAL INFORMATION

Traditionally, the area codes are presented in parentheses to make it clearer to users and to denote that their use is optional depending on the location of the caller (for example, local versus long-distance). However, the expansion of 'local' ten-digit dialing means that the insertion of a hyphen is a preferred practice.

Even if all of the phone numbers in a database share the same area code, you still need to include it in each instance.

Use hyphens on 9-1-1 and 3-1-1 to ensure the digits stand out clearly.

If there is a "named" number, such as 800-HELP Now, it is best to use the actual number of the service (for example, 800-435-7669) but include the 800-HELP-NOW to the phone number description field.

In iCarol, the numerical phone number is included in the Phone Number field. If the service is not available by phone (i.e. an online service), "No phone access available" should be added to the Phone Number field with no Phone Name.

CONFIDENTIAL

This is an XML option for indicating when a phone number is labeled as confidential.

REASON WITHHELD

This is an area of the XML structure that allows for an explanation as to why a phone number may be withheld from a record (for example, in the case of a mutual support group where the only number is someone's home phone).

In iCarol, this information is included in the phone description field.

PHONE EXTENSION

DEFINITION

A phone extension is an element following the phone number, which routes a call to a particular location.

In iCarol, phone extensions are included in the Phone Number field.

PREFERRED STYLE EXAMPLES

555-555-5555 ext 213

ADDITIONAL INFORMATION

If writing an extension as part of the overall telephone number, it is best to avoid using a comma and use "ext" without a period (for example, 777-666-5555 ext 4653).

In most cases, calls to agencies go to a main switchboard/reception area and are then diverted to the particular person. An extension should only be used if it is absolutely necessary to be precise.

PHONE DESCRIPTION

DEFINITION

A phone description modifies a phone number. It is information that clarifies the purpose of the phone number, beyond what is communicated by the phone type. For example, it may explain that the phone number is the "administration line", the "after hours service" or the "central intake" number.

There may also be a need to indicate other information about the number (for example, that a particular toll-free phone number is English only or Spanish only).

In iCarol, phone description information is included in the Phone Description field.

PREFERRED STYLE EXAMPLES

Service/Intake

Administration

After Hours Answering Service

800-HELP-NOW
Recorded Information

ADDITIONAL INFORMATION

Generally, use Administration over Admin.

PHONE TYPE

DEFINITION

A phone type modifies the phone number. It is information that clarifies the purpose or classification of the phone number, but that applies to the type of phone into which an incoming call is connected. For example, the “phone type” would describe whether the number that has been dialed is heading to voice line or a fax machine.

In iCarol, phone type is included in the Phone Name field.

PREFERRED STYLE EXAMPLES

Voice (default)
Voice - Mobile
Voice/Fax
Fax
TTY/TDD
Voice/TTY/TDD

ADDITIONAL INFORMATION

The logical assumption is that a call is going to a voice telephone unless indicated otherwise.

The recommendations listed above do not include all preset Phone Name options available in iCarol, as some preset options are a blend of Phone Type and Phone Description data elements, which this Guide recommends entering into separate fields in iCarol. However, the combined use of the preset options and Custom-named fields enable the use of the recommended list.

PHONE FUNCTION

This allows for any additional contextual information that might be required. For example, “Phone staffed with a live person 24/7 except on weekends and holidays when it is forwarded to answering service.”

In iCarol, this is included in the Phone Description field.

TOLL FREE

This is an XML option that allows a phone number to be tagged in order to clarify that it is toll-free.

DATA ELEMENT: AGENCY – WEBSITE(S)/URL(S)

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|---------------------|----------------------------|--------------------|---------------|-------------------|
| Websites/URLs | *Required* | Agency/URL | URL | Website |

DEFINITION

A URL (Universal or Uniform Resource Locator) is a way of specifying the location of a file or resource on the Internet. Also commonly known as a website or web address. In the resource database, the agency URL should be the official main website of the organization.

PREFERRED STYLE EXAMPLES

www.cairs.org

<http://cairs.org>

<http://twitter.com/211CA>

DATA ELEMENT: AGENCY – E-MAIL ADDRESS(ES)

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|---------------------|----------------------------|--------------------|---------------|-------------------|
| E-mail Address(es) | *Required* | Agency/Email | Email | Main Email |

DEFINITION

E-mail refers to an electronic mail address; a place to direct online/electronic correspondence.

PREFERRED STYLE EXAMPLES

info@cairs.org

ourtowninfo@aol.com

ymca@isp.net

ADDITIONAL INFORMATION

This should refer to the main e-mail address of an agency rather than the e-mail of an individual such as an Executive Director. If no general e-mail address is provided (for example, info@agency.org), then use the one that the agency requests. The email address must be a

valid email. An empty string, or something like email@com would fail validation. This element may remain blank if the agency doesn't have one.

DATA ELEMENT: AGENCY – NAME AND TITLE OF THE DIRECTOR OR ADMINISTRATOR

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|---|----------------------------|--------------------|---------------|---|
| Name and Title of the Director or Administrator | Recommended | Agency/Contact | Contact | Agency Director or Senior Administrator |

DEFINITION

The contact name reflects the single person at the head of an agency. This person is the individual who is ultimately accountable for its operation. It would not usually be someone who is directly contacted except when an issue such as a serious complaint is concerned.

| |
|---------------|
| AIRS XSD Name |
| Contact Name |
| Contact Title |
| Contact Type |

Contacts may also contain optional information that is specific to the contact person.

CONTACT NAME

PREFERRED STYLE EXAMPLES

Colonel Ian Parlour
 Dr Jenny A Jenkins
 Father John Seymour
 Hanif Mohammed
 Mr T James Jameson
 Mrs Anne Hughes-Simmons
 Ms A M River
 Selma Rodriguez

ADDITIONAL INFORMATION

iCarol includes both the person's title (for example, Mr, Ms, Captain, Dr) and name (first and last name with options for the use of initials) in a single name field.

Preferably both first and last names should be completed in full. If the agency does not stipulate (or insist) on the use of an honorific “Mr” or “Ms”, it might be better to omit it. The exception might be if a first name could be applicable to both genders, in which case it is helpful to indicate (for example, Ms Jackie Wilson or Mr Jackie Wilson). (Use Ms rather than Mrs unless agency has expressed preference).

If an agency provides a more formal recitation of the name of the main contact (for example, Mrs N M Wilkinson), then that should be respected. But omit credentials that come after a name (for example, MSW or PhD).

Occasionally, you may encounter an agency that describes itself as a Collective. In this case, it is best to simply ask for one name to serve as the “Office Contact”. If no name is supplied, then omit but use a generic title such as “Director”.

If the Agency Director or Senior Contact is also the contact for resource updates, include them in the Main Contact Person set of fields as well.

CONTACT TITLE

DEFINITION

The contact title reflects the formal job position of the person at the head of an agency/organization. This person is intended to be the person who is ultimately accountable for its operation. It would not usually be someone who is directly contacted except when an issue such as a serious complaint is concerned. The contact title follows the contact name.

PREFERRED STYLE EXAMPLES

Chief Medical Officer
Executive Director
Director
Director of Operations
Office Coordinator
Parish Priest
President and CEO

ADDITIONAL INFORMATION

Generally, write out titles in full (for example, Executive Director instead of ED). The exceptions are usually CEO and COO (again, note the omission of periods/punctuation wherever possible).

CONTACT TYPE

DEFINITION

Main Contact Person field- This is the person that is responsible for verifying information for the agency and is the point person for 2-1-1.

Agency Director or Senior Administrator field- This is the person that is accountable for the overall operation of the agency.

DATA ELEMENT: AGENCY – DESCRIPTION

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|---------------------|----------------------------|---------------------------|--------------------|-------------------|
| Agency Description | *Required* | Agency/Agency Description | Agency Description | Description |

DEFINITION

The agency description is a short (1 to 2 sentence) summary of the organization’s prime nature and activities.

PREFERRED STYLE EXAMPLES

- Multi-service agency operating prevention, early intervention and family support programs for youth and families.
- Regional food bank for Smith County. Collects and distributes donated and purchased food through a network of charitable foods providers throughout the County.
- Comprehensive employment center.
- Municipal government organization providing services and information to residents of Smithville.

If mission statements are allowed by provider:

- Community based organization providing services in the areas of Family Strengthening, Mental Health and Family Violence Intervention with the mission ‘Strengthening children, families and communities to be safe, healthy and thriving’.

ADDITIONAL INFORMATION

This field is a helpful way of understanding the broad nature of an agency. The emphasis should be on brevity and not to duplicate the more detailed service records.

While program descriptions need to focus on concrete information about services, the agency description field can include more abstract information about the agency. If the 2-1-1 service is interested in including the agency mission statement, it can be included in this field.

DATA ELEMENT: AGENCY – LICENSES OR ACCREDITATIONS

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|----------------------------|-----------------------------------|------------------------------|-----------------------|-----------------------------|
| Licenses or Accreditations | Recommended | Agency/License Accreditation | License Accreditation | Licenses and Accreditations |

DEFINITION

If an agency operates either with or because of a license or accreditation secured through a recognized external entity, then this can be recognized within the I&R database record. For example, a child care center of a certain size could only legally conduct business if it has a license, or a hospital would require specific accreditation to validate its status.

PREFERRED STYLE EXAMPLES

AIRS Accredited

Licensed by Community Care Licensing (child care center)

State Alcohol Certified (residential facility)

ADDITIONAL INFORMATION

When possible, it is helpful to provide the full name of the licensing body in order to provide users with the opportunity to confirm credentials.

It is best to use this field with discretion. For example, a school board would obviously only employ teachers who are licensed to teach. The emphasis should be on providing useful information to users, particularly in service areas where perhaps some organizations are licensed (for example, within home health care) but others are not.

DATA ELEMENT: AGENCY – IRS STATUS

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|----------------------------|-----------------------------------|---------------------------|----------------------|--------------------------|
| IRS Status | Recommended | Agency/IRS Status | IRS Status | Tax Status |

DEFINITION

IRS Status refers to the particular section of the Internal Revenue Code that exempts the organization from the payment of federal income tax or designates it under an alternative status.

PREFERRED STYLE EXAMPLES

None or unknown
501(a)
501(c)(3)
Registered Charity
Commercial

ADDITIONAL INFORMATION

An agency can be a registered and incorporated nonprofit but might not have been granted charitable status at the Federal level. There may also be entities within an I&R database that do not have any IRS status (such as informal support groups). Much of the information gathered under the Legal Status field may be more useful than IRS Status.

DATA ELEMENT: AGENCY – FEDERAL EMPLOYER IDENTIFICATION NUMBER (EIN-FEIN)

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|---|----------------------------|--------------------|---------------|--------------------|
| Federal Employer Identification Number (EIN/FEIN) | Recommended | Agency/FEIN | FEIN | Employer ID Number |

DEFINITION

A Federal Employer Identification Number (FEIN), is a unique nine digit number (XX-XXXXXXX) that the IRS (United States Internal Revenue Service) assigns to business entities. The IRS uses this number to identify taxpayers that are required to file various returns. FEINs are used by employers, sole proprietors, corporations, partnerships, nonprofit organizations, trusts and estates, government agencies, certain individuals and other business entities.

PREFERRED STYLE EXAMPLES

87-8573645

ADDITIONAL INFORMATION

The FEIN is also known as an Employer Identification Number (EIN), a Federal Tax Identification Number, and a Tax ID.

DATA ELEMENT: AGENCY – YEAR OF INCORPORATION

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|----------------------------|-----------------------------------|---------------------------|----------------------|--------------------------|
| Year of Incorporation | Recommended | Agency/Year Inc | Year Inc | Year Incorporated |

DEFINITION

The year of incorporation is the official year in which the legal documents that covered an organization’s registration were processed and finalized.

PREFERRED STYLE EXAMPLES

1987
2004

ADDITIONAL INFORMATION

This is not the same as the year an agency started, as many agencies might open as unincorporated bodies and operate on an informal basis for a few years before incorporation.

DATA ELEMENT: AGENCY – ANNUAL BUDGET TOTAL

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|----------------------------|-----------------------------------|----------------------------|----------------------|--------------------------|
| None | N/A | Agency/Annual Budget Total | Annual Budget Total | Annual Budget |

DEFINITION

The money that an agency spends or plans to spend over the course of a year to deliver its services, including all of its administrative and other operating costs.

PREFERRED STYLE EXAMPLES

\$37,000
\$560,000
\$1,580,000

ADDITIONAL INFORMATION

The 2-1-1 CA Style Guide does not recommend completing this field unless there is a specific need to track this information.

This item tends to cause confusion amongst agencies during database updating with concerns about the information’s use, accuracy and purpose. Is it their budgeted amount for the current operating year (which most independent entities would be reluctant to publicly share) or their annual expenditure from their last annual report (which might be publicly available but be perhaps two years old)?

It is better to use round numbers (to the nearest \$1,000 on amounts under \$100,000 and to the nearest \$10,000 on higher amounts). For example, use \$73,000 rather than \$72,852 and \$270,000 rather \$268,563.

DATA ELEMENT: AGENCY – LEGAL STATUS/AGENCY TYPE

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|---------------------|----------------------------|---------------------|---------------|-------------------|
| Legal Status | *Required* | Agency/Legal Status | Legal Status | Legal Status |

DEFINITION

The legal status of an organization is the designation indicating the type of organization or conditions under which the organization is operating, i.e., a private, nonprofit corporation, a for-profit (commercial, proprietary) organization, a government (public) organization, or a grass roots entity such as a support group that is not incorporated and has no formal status as an organization.

PREFERRED STYLE EXAMPLES

Nonprofit – Incorporated
Nonprofit – Unincorporated
Faith-based
Coalition
Private Practice
Cooperative

Commercial (preferred to 'for-profit')

Government – City

Government – County

Government – Federal

Government – Regional

Government – State

Government – Territorial

Government – Town

Government – Township

Government – Village

Special District

Tribal

DATA ELEMENT: AGENCY – SOURCE OF FUNDS

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|----------------------------|-----------------------------------|---------------------------|----------------------|--------------------------|
| None | N/A | Agency/Source Of Funds | Source of Funds | Sources of Funding |

DEFINITION

The source of funds indicates the entities that fund an agency and/or the type of funding received by an agency.

PREFERRED STYLE EXAMPLES

Federal

State

County

United Way

ADDITIONAL INFORMATION

This is an optional element, which is a reflection of the value of this information and the difficulty to obtain and maintain it. If this information is being collected, it is best to concentrate on “core” (that is, regular year-by-year contributions from major funders) rather than “program” or “one-time” funding (that is, short-term funding that might vary every year such as from foundations or through pilot projects).

DATA ELEMENT: AGENCY – DATE OF LAST INTERIM MODIFICATION/PARTIAL UPDATE; CONTACT FOR UPDATING PURPOSES

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|---|-----------------------------------|---------------------------|----------------------|--------------------------|
| Date of Last Interim Modification/Partial Update; Contact for Updating Purposes | *Required* | Agency/Resource Info | Resource Info | Last Verified On |

| AIRS XSD Name |
|-------------------------|
| Contact |
| Resource Specialist |
| Available for Directory |
| Available for Referral |
| Available for Research |
| Date Added |
| Date Last Verified |
| Date Last Action |
| Last Action Type |

CONTACT

See Section ‘Agency - Name and Title of the Director or Administrator’ for an explanation of the structure of a ‘contact’. In this instance, the contact is the person at the agency/organization who is responsible for verifying the accuracy of information in the database record. This person’s information is included in the Main Contact set of fields.

RESOURCE SPECIALIST

This is the person at the I&R program who is primarily responsible for administering a particular record.

AVAILABLE FOR DIRECTORY

This is a flag that identifies that a record can be included in a directory.

AVAILABLE FOR REFERRAL

This is a flag that identifies that a record is ready for active use in providing referrals.

AVAILABLE FOR RESEARCH

This is a flag that identifies that a record is ready for research but not yet ready for active use. iCarol has an 'available for research' indicator option, but does not have this present in the default resource management or call handler view.

DATE ADDED

This is the date on which a particular record was created in iCarol.

DATE LAST VERIFIED

This is the date on which the record was last verified. That verification might be a formal annual updating of the record or a modification between updates. The AIRS Standards refer to an “interim modification or partial update” as a piece of agency information that has been changed and verified by the agency, whereas a “complete or annual update” is when the agency was contacted and all of its information was completed verified. In some instances, no actual changes might be made but the record was still updated (i.e. there was a verification that no changes were needed).

DATE LAST ACTION

This is the date on which the record was last updated or modified.

LAST ACTION TYPE

This refers to what occurred when the record was last updated or modified.

DATA ELEMENT: AGENCY – EXCLUDE FROM WEBSITE

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|----------------------------|-----------------------------------|-----------------------------|----------------------|--|
| | | Agency/Exclude From Website | Exclude From Website | Exclude from Public Resource Directory (website) |

DEFINITION

This is used to denote whether a particular record within the I&R database is or is not intended to also be displayed as part of an online directory on the agency’s website.

PREFERRED STYLE EXAMPLES

In iCarol, this check box is located in the Agency Information section of the Agency level. Agency entries are included in the public directory unless they are specially excluded.

ADDITIONAL INFORMATION

This editing decision may apply, for example, to a church that is comfortable with having information about its food pantry shared over the phone with appropriate callers but is reluctant to having it more widely known, especially if the pantry is struggling to meet current demands.

As I&R agencies become more specialized in online dissemination, there may be instances where data records are excluded from one online database but included in another “view” of that data. For example, a mental health support group may be excluded from the main database but included in a specialized sub-set that is shared with certain client groups.

DATA ELEMENT: AGENCY – EXCLUDE FROM DIRECTORY

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol field name |
|----------------------------|-----------------------------------|-------------------------------|------------------------|---|
| None | N/A | Agency/Exclude From Directory | Exclude From Directory | Exclude from Public Printable Directory |

DEFINITION

This is used to denote whether a particular record within the I&R database is or is not intended to also be displayed as part of a published directory of services or another publication.

PREFERRED STYLE EXAMPLES

In iCarol, this check box is located in the Agency Information section of the Agency level. Agency entries are included in printable directories unless they are specially excluded.

ADDITIONAL INFORMATION

As with the Exclude from Website data element, this editing decision may apply to a church that is comfortable with having information about its food pantry be shared over the phone with appropriate callers but is reluctant to having it more widely known, especially if the pantry is struggling to meet current demands.

STYLE GUIDE NOTE: LOCATION AND ADDRESS FIELDS AT THE AGENCY LEVEL

Because it is not possible to attach a Site entry to the Agency level in iCarol, Street/Physical Address and Mailing Address fields are included at the Agency level. Please note that the guidance in the Site Level Street/Physical Address and Mailing Address data element sections applies to the iCarol Agency level address areas as well.

SECTION 3 - DATA STRUCTURE: SITE

DEFINITION

Sites are the physical locations from which clients access services provided by an agency. An agency must have at least one site but can have several. The Site Data elements are also used by the Agency level to describe where the Agency is located.

Site records contain identifying information about each specific physical location. Specific details about programs that are available at a site are contained at the Service/Program level of the data structure.

Some of these elements should be styled in the same manner as their counterpart element within the “Agency” record. However, the content must be specific to that location (for example, any URL must be specific to that site and not the main agency URL that was already entered at the Agency level).

DATA ELEMENT: SITE – UNIQUE ID NUMBER (KEY)

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|---------------------|--------------------------|--------------------|---------------|-------------------|
| Unique ID Number | *Required* | Site/Key | Key | Resource Num |

DEFINITION

The record ID number is a unique numerical code that is affixed to every single record within a resource database (whether that is an agency record, a site record or a program record). Although the site’s name might change, its unique number will remain the same.

The general rules listed under *Agency – Unique ID Number* also apply here.

DATA ELEMENT: SITE – SITE NAME

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|---------------------|--------------------------|--------------------|---------------|-------------------|
| Site Name | *Required* | Site/Name | Name | Site Name |

DEFINITION

This is the name of the site/location. If an agency has only a single location, then to all intents and purposes, the agency name is usually also listed as the site name, unless the building has a specific name/title.

Additional site names should be unique to each site and different from the full agency name.

PREFERRED STYLE EXAMPLES:

- San Mateo Office
- Administrative Office – King City
- Lakeside Library Riverfront Branch
- Salvation Army Oxnard Homeless Shelter
- YMCA Mary Street Child Care Office
- North County Office
- East County Job & Career Center
- Thousand Oaks Under One Roof Building
- Ocean Hospital Outpatient Clinic

ADDITIONAL INFORMATION

In some instances, the site name has a distinct alternative title. For example, the CM Mathewson Mental Health Clinic may be a site of the regional public health authority.

In other cases, the site name may be drawn from the function that it provides for the agency. For example, if the local Salvation Army operates a thrift store at another location, the site name might be “created” as Salvation Army Thrift Store. If it operates a couple of thrift stores, maybe the site names become Salvation Army Main Street Thrift Store and Salvation Army Broad Street Thrift Store.

Keep in mind that, in iCarol, staff handling calls will navigate between different Site and Program information in the Resource Search page using the these names, so if a program is offered at multiple sites, having brief, but descriptive Site Names is helpful.

The general rules listed under *Agency – Agency Name* also apply here.

DATA ELEMENT: SITE – DESCRIPTION

| AIRS Standards Name | AIRS Standards Reference | AIRS XSD Name | iCarol Field Name |
|---------------------|--------------------------|------------------|-------------------|
| Site Description | *Required* | Site Description | Site Name |

DEFINITION

The site description conveys aspects of the site that make it unique to other sites.

ADDITIONAL INFORMATION

While a Description of Location field exists in iCarol, this Guide recommends, whenever possible, incorporating this data element in the Site Name field by indicating unique aspects of the site. For example, creating Site Name ‘Administrative Office-King City’ or ‘Salvation Army Oxnard Homeless Shelter’ instead of ‘Administrative Office’ or ‘Homeless Shelter’.

PREFERRED STYLE EXAMPLES:

See Site Name preferred examples above.

DATA ELEMENT: SITE – AKA (ALSO KNOWN AS) NAMES

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|----------------------------|---------------------------------|---------------------------|----------------------|--------------------------------|
| AKA (Also Known As) Names | *Required* | Site/AKA | AKA | Search hints or Alternate name |

The general rules listed under *Agency – AKA (Also Known As) Names* also apply here.

DATA ELEMENT: SITE – STREET/PHYSICAL ADDRESS

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|----------------------------|---------------------------------|---------------------------|----------------------|--------------------------|
| Street/Physical Address | *Required* | Site/PhysicalAddress | Physical Address | Site Location |

DEFINITION

The street address describes the physical address of the site(s) from which the agency operates.

AIRS XML COMPONENTS

| AIRS XSD Name |
|----------------------|
| Address Line 1 |
| Address Line 2 |
| City |
| County |
| State |
| ZIP |
| Country |

| |
|-----------------|
| Reason Withheld |
| Confidential |
| Description |

ADDRESS LINE 1

Address Line One is used for the actual street address.

ADDRESS LINE 2

Address Line Two is reserved for an additional component such as the apartment, suite or unit number.

The following is an example of an address that uses both lines:

17 Oak Drive

Suite 17

ADDITIONAL INFORMATION

Although there are standard abbreviations (for example, St) that will be read by geo-mapping programs and are officially approved by the postal service, using a full spelling would seem to remove any possibility of ambiguity.

When using an official abbreviation, there is no need to use periods (for example, use “Blvd” and not “Blvd.”).

Some addresses will be provided by agencies in the style of “234-111 Cedar Street”. Although this is officially recognized, it is not intuitive for users and changing the style to “111 Cedar Street, Suite 234” is clearer. If you are unsure whether it is a “suite”, use the more flexible word “unit”.

Never use “#” as an introduction to a number. For example, change 16 Balsam Avenue, #24 to 16 Balsam Avenue, Unit 24.

If the street name incorporates a “direction” (such as Young Street North or Old Avenue South) that can be written in full. Addresses that reflect a larger grid can be designated with the abbreviation (such as 453 Wood Road NW or 67 Stone Place SE).

CITY

This is the part of the physical address that describes the major city or town from which the site operates.

ADDITIONAL INFORMATION

Standard and full spellings should be used.

In rural areas, “city” may mean an incorporated town or even an unincorporated village. In major metropolitan areas, the convention may mean an incorporated town that is part of a larger urban entity that may not be well known nationally but locally is more specific and useful.

COUNTY

The county is the part of the physical address that describes the larger region in which the site is located. Usually, the County name is omitted if there is a village, town or city designation that is clearer.

STATE/PROVINCE

The designation of the state/province must be part of the site address of the organization. Use only the official two-letter code for all states, provinces and territories.

PREFERRED STYLE EXAMPLES

AZ
CA
PR
WY

ADDITIONAL INFORMATION

Do not use a period to denote the abbreviation (for example, use CA but not CA.).

Use upper case (for example, CA but not Ca).

ZIP/POSTAL CODE

The ZIP code and the postal code must be part of the site address. This element must use the fixed official structures used by the respective national postal services of the United States and Canada.

PREFERRED STYLE EXAMPLES

40125-6079
68516

COUNTRY

This is not usually required and may be a default (e.g. USA or Canada) but some resource databases may require the need to list agencies based in other countries. For example, many border communities may need to maintain a few records of organizations in the neighboring country.

DATA ELEMENT: SITE – MAILING ADDRESS

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|---------------------|--------------------------|----------------------|-----------------|----------------------|
| Mailing Address | *Required* | Site/Mailing Address | Mailing Address | Site Mailing Address |

DEFINITION

The mailing address describes the official postal address of the site(s) from which the organization operates when that address differs from the physical address (i.e. if there is no specific mailing address, then the physical address is the 'official' address).

The mailing address is constructed from the same data components as the physical address in terms of address line, city, state/province, ZIP/postal code.

PREFERRED STYLE EXAMPLES

PO Box 45
Hanford, CA 93230

General Delivery
Small Town, CA 99999

ADDITIONAL INFORMATION

Generally, you cannot “go to” a mailing address but you should be able to “go to” a physical address.

Avoid abbreviating the PO Box as P.O. Box., or General Delivery as GD or G.D.

DATA ELEMENT: SITE – OTHER ADDRESSES

2-1-1 California does not recommend the use of this data element.

DATA ELEMENT: SITE – NO PHYSICAL ADDRESS

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|---------------------|--------------------------|--------------------------|---------------------|-------------------|
| None | N/A | Site/No Physical Address | No Physical Address | |

DEFINITION

This concept is used very rarely, usually for online resources that might be usefully included within the database but which have no actual or relevant physical address.

PREFERRED STYLE EXAMPLES

Leave Physical Address blank in iCarol.

DATA ELEMENT: SITE – PHONE NUMBER(S) INCLUDING EXTENSIONS, PHONE TYPES AND PHONE FUNCTIONS

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|---|--------------------------|--------------------|---------------|--------------------|
| Phone Number(s) including Extensions, Phone Types and Phone Functions | *Required* | Site/Phone | Phone | Site Phone Numbers |

DEFINITION

The phone number(s) through which a particular site can be reached. Phone data include phone numbers, extensions, phone types (e.g., Voice, TTY/TDD), and phone functions (e.g., administration, intake).

2-1-1 California does not recommend the use of phone numbers at the site level.

DATA ELEMENT: SITE – WEBSITE(S)/URL(S)

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|----------------------------|---------------------------------|---------------------------|----------------------|--------------------------|
| Website(s)/URL(s) | Recommended | Site/URL | URL | Website |

DEFINITION

A URL (Universal or Uniform Resource Locator) is a way of specifying the location of a file or resource on the Internet. Also commonly known as a website or web address. In the resource database, the agency URL should be the official main website of the organization. A site URL should only be included if it is unique to the location.

The general rules listed under *Agency – Website(s)/URL* also apply here.

DATA ELEMENT: SITE – E-MAIL ADDRESS(ES)

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|----------------------------|---------------------------------|---------------------------|----------------------|--------------------------|
| Email Address(es) | Recommended | Site/Email | Email | Email address |

DEFINITION

E-mail refers to an electronic mail address; a place to direct online/electronic correspondence.

The general rules listed under *Agency – E-mail Address(es)* also apply here.

DATA ELEMENT: SITE – NAME AND TITLE OF SITE MANAGER

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|--------------------------------|---------------------------------|---------------------------|----------------------|--------------------------|
| Name and Title of Site Manager | Recommended | Site/Contact | Contact | Site Main Contact Person |

DEFINITION

This contact name and title reflects the single individual at the head of a particular site. When an agency has only a single site, this information is already included at the Agency level as the Name and Title of the Director or Administrator. When an organization has two or more sites, there may or may not be a single person who can be listed in the role of site manager.

The general rules listed under *Agency – Name and Title of Director of Administrator* also apply here.

DATA ELEMENT: SITE – ADMINISTRATIVE HOURS/DAYS OF OPERATION

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|--|---------------------------------|---------------------------|----------------------|--------------------------|
| Administrative Hours/Days of Operation | Recommended | Site/Time Open | Time Open | Hours of Operation |

DEFINITION

This refers to the days and times an individual can access a service or (in this case) the administrative hours the site is open to the public.

AIRS XML COMPONENTS

| AIRS XSD Name | | |
|----------------------|------|----|
| Sunday | From | To |
| Monday | From | To |
| Tuesday | From | To |
| Wednesday | From | To |
| Thursday | From | To |
| Friday | From | To |
| Saturday | From | To |
| Notes | | |

PREFERRED STYLE EXAMPLES

Description of hours:

First and third Friday of each month 9am-2pm

Mon-Thu 9am-5pm, Fri 9am-12noon and 6pm-9pm

Hours vary – call for details

Mon-Fri 8:30am-4:30pm (Closed lunch 12noon-1pm)

ADDITIONAL INFORMATION

There are many ways in which hours of operation and availability can be listed within a text field.

As a few of these entries will be quite complex, it is best to consistently use a standard three letter contraction for each day of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun).

Try to organize the information in terms of the order of the week (that is, start on Monday and end on the last day that service is available (usually Friday or Sunday)).

Avoid using a 24 hour clock (for example, use 6pm rather than 18.00).

To be certain of clarity, consider using Noon and Midnight instead of 12am and 12pm (or possibly 12 noon and 12 midnight).

Although there is merit to making a note of any lunchtimes during which an organization might be closed, it tends to make the information very difficult to read. Use your discretion on whether to enter that specific information.

iCarol also supports multiple open and close times per day. For example Monday could have a time open from 8:00AM to 12:00PM and again from 2:00PM to 6:00PM

DATA ELEMENT: SITE – PHYSICAL ACCESS

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|----------------------------|---------------------------------|---------------------------|----------------------|--------------------------|
| Physical Access | Recommended | Site/Disabilities Access | Disabilities Access | Disabilities Access |

DEFINITION

This describes the factors that either help or hinder access to the site/location for people with physical disabilities.

PREFERRED STYLE EXAMPLES

Wheelchair access with main doors, ramps, wheelchair accessible washrooms

No wheelchair access

Designated parking spaces

Tone elevators

Visual alert systems

Wheelchair access – call for additional accommodations

ADDITIONAL INFORMATION

When surveying agencies on their accessibility, it is helpful to provide a specific list of options (such as some of the items listed under style examples) for the agency to select.

Also remember that access for people with physical disabilities covers more issues than wheelchair access.

DATA ELEMENT: SITE – TRAVEL INFORMATION

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|----------------------------|---------------------------------|--------------------------------------|-------------------------------|--------------------------|
| Travel Information | Recommended | Site/Physical Location Description | Physical Location Description | Description of Location |
| Travel Information | Recommended | Site/Cross Street | Cross Street | Description of Location |
| Geospatial Information | Recommended | Site/Spatial Location | Spatial Location | |
| Travel Information | Recommended | Site/Public Access to Transportation | Public Transportation Access | Bus Service |

DEFINITION

This provides a variety of ways to include more detailed information to help people identify a location and get there as easily as possible.

PHYSICAL LOCATION DESCRIPTION

This can be helpful if a street address does not reflect a location that would otherwise be well known to a client (for example, a shopping mall or a government building). It is also useful when additional information is needed to easily find the location (for example, a food pantry may operate from a church but its actual entrance is through a side door off an adjoining street).

PREFERRED STYLE EXAMPLES

- Within Riverside Shopping Center
- In basement at City Hall
- Next to Lagoon Library
- Entrance at unmarked door off Harbor Street

ADDITIONAL INFORMATION

Only use this data element if it provides distinctive information. For example, “near bus stop” or “across from restaurant” or “next to convenience store” may be applicable to hundreds of locations and would not be particularly helpful to the client.

CROSS STREET

As a general rule, intersection should be listed with the north-south street names first followed by the east-west street. It is best to be clear that this is generally the nearest *major* intersection, to avoid the client expecting to find it at the immediate junction.

PUBLIC TRANSPORTATION ACCESS

This allows an agency to provide additional textual information about specific public transit access to locations. For the purpose of this data element, “bus” also applies to streetcars, subways and other forms of fixed-route public transport. While this may be helpful, it still requires that clients check for themselves (for example, they may be told that the 65 Bus will take them to a location, only to find that bus only runs once every three hours). In this instance, no information is better than unintentionally misleading information that can cause a huge inconvenience for clients.

This is a field that requires a great deal of effort to properly maintain, and if it can’t be properly maintained, an agency should consider opting not to collect it.

There also a need for clarity regarding what “close” to a bus route actually means. Because this may be relative to the area, each service provider maintaining this field should determine how close a public transportation option must be to be included.

PREFERRED STYLE EXAMPLES

Bus Route - 61B

BART - Civic Center Station

MUNI - 38 Stanion, 40 Divisidero

Bus Routes 16, 25, 26, 27C, 70 Express, 84

Not accessible by public transportation

SPATIAL LOCATION

A spatial location is the information about a physical location that pinpoints its exact location on the earth.

AIRS XML COMPONENTS

| |
|---------------|
| AIRS XSD Name |
| Description |
| Datum |

| |
|-----------|
| Latitude |
| Longitude |

A datum may define the association of latitude and longitude.

iCarol does not use latitude/longitude for Google mapping, but rather passes the actual address directly to Google. However, iCarol does append latitude/longitude to speed up “sort by proximity” results in a search. The default method of determining the coordinates is from the site’s physical zip code.

DATA ELEMENT: SITE – LANGUAGES

2-1-1 CA discourages the use of this field at the Site level. This field is encouraged at the Program/Program@Site level and the Agency level when appropriate.

DATA ELEMENT: SITE – YEAR INCORPORATED

2-1-1 CA discourages the use of this field at the Site level. This field is encouraged at the Agency level when appropriate.

DATA ELEMENT: SITE – ANNUAL BUDGET TOTAL

2-1-1 CA discourages the use of this field at the Site level. This field is encouraged at the Agency level when appropriate.

DATA ELEMENT: SITE – LEGAL STATUS

2-1-1 CA discourages the use of this field at the Site level. This field is encouraged at the Agency level when appropriate.

DATA ELEMENT: SITE – EXCLUDE FROM WEBSITE

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|----------------------------|---------------------------------|---------------------------|----------------------|--|
| None | N/A | Site/Exclude from Website | Exclude From Website | Exclude from Public Resource Directory (website) |

DEFINITION

This is used to denote whether a particular site within the I&R database is or is not intended to also be displayed as part of a published website of services.

The general rules listed under *Agency – Exclude from Website* also apply here.

DATA ELEMENT: SITE – EXCLUDE FROM DIRECTORY

| AIRS Standards Name | AIRS Standards Reference | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|----------------------------|---------------------------------|-----------------------------|------------------------|----------------------------------|
| None | N/A | Site/Exclude from Directory | Exclude From Directory | Exclude from Printable Directory |

DEFINITION

This is used to denote whether a particular site record within the I&R database is or is not intended to also be displayed as part of a published directory of services or another publication.

The general rules listed under *Agency – Exclude from Website* also apply here.

SECTION 4 - DATA STRUCTURE: SERVICE/PROGRAM (PROGRAM/PROGRAM@SITE)

DEFINITION

A service/program record describes the types of assistance an agency delivers to its clients.

Operationally, “services” are specific activities that can be classified using Taxonomy terms.

I&R services may group similar agency services into a “Service Group” for ease of data entry, management and display; and assign a name (Service Group Name) to the services represented in the cluster.

A SiteService (Program@Site in iCarol) is a mechanism within a software package for representing one specific service or Service Group provided at a specific location (site). Service sites are the most detailed level of the resource database structure. Data collected at this level allows for very specific information about one service (home delivered meals) at a specific site (Salvation Army’s West Side Office) to be retrieved and displayed.

Service/program records generally include a narrative that offers a summary of what is provided, in addition to other key data elements such as eligibility information and application procedures.

DATA ELEMENT: SERVICE/PROGRAM – UNIQUE ID NUMBER (KEY)

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|--|----------------------------|--------------------|---------------|-------------------|
| Unique ID Number for the Service Group | *Required* | SiteService/Key | Key | Resource Num |

DEFINITION

The record ID number is a unique numerical code that is affixed to every single record within a resource database (whether that is an Agency, Site, Program or Program@Site record). Although the service/program’s name might change, its unique number will remain constant throughout the record.

The general rules listed under *Agency – Unique ID Number* also apply here.

DATA ELEMENT: SERVICE/PROGRAM – PROGRAM NAME

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|------------------------------------|----------------------------|---|---------------|-------------------|
| Program Name for the Service Group | *Required* | SiteService/Name – This is the program name at the parent Site. | Name | Program Name |

DEFINITION

This refers to the specific name of the program. The Program Name is the proper name for a service or group of services that is specified by the agency, rather than created by the I&R service. In some cases, there is no specific program name for the service group.

If there is no program name, a Service Group Name can be created in this field. A Service Group Name is a name created by the 2-1-1 service for a group of services to describe the nature of the group of services.

PREFERRED STYLE EXAMPLES

- Employment Assistance
- Family Literacy Program
- Head Start
- Mental Health Assessment Services
- Substance Abuse Prevention Program
- Utility Assistance Program
- Vocational Training Services
- Women, Infants and Children (WIC) Program

ADDITIONAL INFORMATION

This should be the name that is clearly provided by the agency providing the program. In some instances, the name may need to be formulated by the Resource Specialists based on the clearest expression of the activities provided.

DATA ELEMENT: SERVICE/PROGRAM – AKA (ALSO KNOWN AS) PROGRAM NAME

| AIRS Standards Name | AIRS Standards Requirement | AIRS XSD Name | iCarol Field Name |
|-----------------------------------|----------------------------|---------------|--------------------------------|
| AKA (Also Known As) Program Names | *Required* | | Search hints or Alternate name |

The general rules listed under *Agency – AKA (Also Known As) Names* on also apply here.

DATA ELEMENT: SERVICE/PROGRAM – SERVICE GROUP DESCRIPTION

| AIRS Standards Name | AIRS Standards Requirement | AIRS XSD Name | iCarol Field Name |
|---------------------------|----------------------------|---------------|-------------------|
| Service Group Description | *Required* | | Description |

DEFINITION

A service description provides an opportunity to describe the nature of a service in order to help someone make an informed decision regarding a referral. This field answers the question “What does this program do?”

The service description is the place to include contextual information (for example, regarding secondary and ancillary services). It is also a place where other relevant data elements can be added if there are no specific fields for those elements and their inclusion would be helpful.

The description should be written in specific enough terms to enable I&R specialists to effectively describe the service provided. The description must reference and describe all of the services indexed using the Taxonomy and should support Target and other terms as needed. Information most appropriate for other fields (i.e. eligibility, intake) should be placed in the appropriate field specific to that data element. Information appropriate to other fields should be included in that appropriate field and should not be duplicated in the description unless the program cannot be effectively described without the inclusion of that information.

ADDITIONAL INFORMATION

- Service descriptions should be **precise** and **meaningful**. They should anticipate any questions that a client might reasonably ask that have not been addressed in other fields. However, it should not include every conceivable piece of detail – these issues are best addressed by the client contacting the program directly.
 - Most program descriptions should be 1-3 sentences long and no longer than 75 words.
- Write information in order of importance
- It is not necessary to make service descriptions full sentences and it is generally unnecessary to begin description sentences with a subject if the subject can be assumed to be the program.
 - i.e. Use “Provides peer counseling” instead of “This program provides peer counseling within a supportive environment ...”.

- Bullets are often easier to read on the computer screen than a list in a single row or a lengthy paragraph.
- Avoid overelaborate phrases or language appropriate for fundraising or marketing (usually supplied by the agencies themselves) which do not explain the services provided. Ask yourself, “What are they actually doing and what would a potential client really want to know?”
 - For example, the description: “A solution-focused model implemented by highly-trained, caring staff, based on empowerment and individualized expression focused on supporting people in our community who struggle with anxiousness and worry.” could be revised to: “Provides brief therapy for individuals, couples, and families. Specializes in anxiety disorders. Services provided by licensed mental health professionals, including Marriage and Family Therapist Interns and licensed Marriage and Family Therapists.
- As a very general rule, adjectives and adverbs can be eliminated.
- Write in third person.
- Do not abbreviate days or months.
- One space following a comma, semi-colon, colon or period.
- Avoid using abbreviations such as e.g. or i.e. if possible. Use “for example” and “that is” or “that means”.
- Don’t use subjective language (such as “highly qualified staff”).
- Be cautious in using health and human service jargon (such as “wrap around”, “psych eval”), acronyms (such as “TRO”, “DV”) and difficult-to-understand terminology wherever possible. If necessary, clarify these types of words and phrases in “laymen’s terms”.
- Spell out numbers when less than two digits (for example, “Open nine months a year” or “Open 10 months a year”).
- Strive for active verbs (such as “*provides* counseling” rather than “*is* a counseling service”), strong verbs (verbs that stand alone, such as “estimate” rather than “make an estimate”).
- Omit minor details that would be hard to consistently update and that can be left to the client to discover when contacting the program (such as specific games occurring at a youth or senior center that may change over time).
- It is recommended that descriptions be read aloud to detect awkwardness.
- Within your own database, try to standardize your descriptions for common services as much as possible.

PREFERRED STYLE EXAMPLES

- Provides child care for toddlers and preschool children in a licensed child care center.
- Offers support groups for alcoholics in a 12-step program model.
- Provides food, clothing, shelter and other basic necessities for those affected by natural disasters such as earthquakes or floods.
- Example of clarifying a specialized health and human service term in layman's terms:
 - Provides mediation services through alternative dispute resolution, which offers procedures for settling civil and minor criminal disputes outside of a court trial. Disputes may include tenant/landlord problems, neighborhood disputes, small claims and family conflicts.
- Example of service group (rather than single service) description:
 - Provides bereavement support to families, including support groups for children and for those who have lost a child and individual counseling for individuals and families who have lost a family member. [Style Guide Note: If the specific services included have distinct eligibility, intake or contact information, it may be appropriate to split support group and counseling services into separate program entries.]
- Example of bullet point list:
 - Provides benefits screening, referral and enrollment assistance through "One-e-App" and Certified Application Assistants. Screening and enrollment available for:
 - Health programs (such as Medi-Cal, Emergency Medi-Cal, California Kids, and Healthy Families, Child Health and Disability Prevention Program and Family PACT, and Women's Cancer Detection program)
 - CalWORKS
 - Nutrition programs (such as CalFresh and WIC)
 - Low-cost auto insurance
 - Utility rate reduction programs (such as CARE, FERA, LIEE, LIHEAP and Lifeline)
 - Earned Income Tax Credit
- Example of spelling out acronyms:
 - Provides safe place for day laborers to wait to be picked up for daily jobs. Clients may also receive a light breakfast and referrals to English as a Second Language (ESL) programs.
- Examples of necessary duplication of eligibility information:
 - Offers one time financial assistance in emergency situations (such as job loss, unexpected medical expenses) and assistance in enrollment in AIDS Drug Assistance Program (ADAP).
 - Secures part-time and full-time employment for San Joaquin County Community College students and alumni in coordination with California State Department of Labor.

- Example of prioritized information:
 - Offers advice regarding problems related to finances, insurance, employment and costs resulting from a cancer diagnosis through one-on-one meetings with patients and families. Operates as local branch of national organization.

DATA ELEMENT: SERVICE/PROGRAM – HOURS OF SERVICE

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|---------------------|----------------------------|-----------------------|---------------|--|
| Hours of Service | *Required* | SiteService/Time Open | Time Open | Program Information-”Hours of Operation” or “Description of Hours” |

DEFINITION

This refers to the days and times an individual can access a service.

The general rules listed under *Site – Administrative Hours/Days of Operation* also apply here.

DATA ELEMENT: SITESERVICE/SEASONAL

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|---------------------|----------------------------|----------------------|---------------|-------------------|
| None | N/A | SiteService/Seasonal | Seasonal | Temporary Message |

DEFINITION

This allows reference to a particular time of year that a service may be available (for example, as is the case with Christmas baskets or tax return assistance).

AIRS XML COMPONENTS

| AIRS XSD Name |
|---------------|
| Description |
| Start Date |
| End Date |

DATA ELEMENT: SERVICE/PROGRAM – PHONE NUMBER(S) INCLUDING EXTENSIONS, PHONE TYPES AND PHONE FUNCTIONS

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|---|----------------------------|--------------------|---------------|-----------------------|
| Phone Number(s) including Extensions, Phone Types and Phone Functions | *Required* | SiteService/Phone | Phone | Program Phone numbers |

DEFINITION

The phone number(s) through which a particular site can be reached. Phone data include phone numbers, extensions, phone types (e.g., Voice, TTY/TDD), and phone functions (e.g., administration, intake).

The general rules listed under Agency – Phone Number(s) including Extensions, Phone Types and Phone Functions also apply here.

DATA ELEMENT: SERVICE/PROGRAM -- ELIGIBILITY

| AIRS Standards Name | AIRS Standards Requirement | AIRS XSD Name | iCarol Field Name |
|---------------------|----------------------------|---------------|-------------------|
| Eligibility | *Required* | | Eligibility |

DEFINITION

The guidelines used by a service provider to determine who is qualified to receive services. Eligibility can be stated in terms of requirements, e.g., “the individual must be a single parent” or exclusions, e.g., “does not serve people who are unemployed”.

In the resource database, these are descriptions of specific conditions that must be met in order to qualify for a particular service or group of services, or specific conditions that exclude certain people. If there are no eligibility requirements/exclusions, the text should read “No restrictions” or “Open to all”. If eligibility is not a separate field in the database, eligibility information is typically found in the service group description. In order to facilitate searching by eligibility, some I&R services structure selected eligibility criteria (e.g. age and gender) in a format that supports the ability to filter data. For example, if age and gender are included as structured information, users are able to search for a home delivered meal program for a male, age 24 and the system will filter out services that are only available to adults age 50 and older.

PREFERRED STYLE EXAMPLES

Open to all

Medicaid recipients age 21 years or older
Youth from 16 to 18 years, people up to 21 years may occasionally be considered
People living with AIDS/HIV and their caregivers
Older adults of Tangerine County who are age 65 years or older.
Children from 4 years to 12 years
People with compulsive eating disorders
Older adults 55 years and up, residing in northern Melon Township
Apple County residents at risk of eviction
Veterans and their dependents
Children at risk of abuse
Pear City parents with low incomes with children from six weeks to 14 years
People in acute mental health crisis
Employees with injuries or illnesses connected to their employment
People with physical disabilities or people recovering from or living with illness/injury

ADDITIONAL INFORMATION

- Eligibility can be based on a number of factors such as age, gender, geography, physical and/or mental health, language, sexual orientation, cultural background and/or income.
- If eligibility is obvious, then there is no need to enter the information. For example, there is no reason to state that a hospital is for people who are ill or injured, that a food pantry is for individuals who are hungry and can't afford to pay for food, or that a library is for people wanting to borrow books.
- However, if a library has a reading program for children of a particular age range, then that needs to be stated in the eligibility area.
- Geographic eligibility, along with age and gender eligibility can often be handled more precisely within the Program@Site record than elsewhere. However, a clear textual expression of eligibility is always helpful.
- Geographic eligibility is often a tricky concept within a consolidated database (that is, a database that comprises several merged regional databases). Within a single local database, there is no need to state for every single service that it is designed for people in that region – but within a larger database, this needs to be clarified.
- Avoid the use of terms such as “Everyone” or “Anyone”.
- Use “person first” language. For example, “People with physical disabilities” and not “Disabled people”.
- Try to avoid labeling language, even if sometimes it seems a little contrived. For example, “People who are in correctional facilities” rather than “People in jail”.
- Use numerals for ages as it is easier to read. The exception is to use “birth” rather than “0”. For example, “From birth to three years”.

- Try to start the description with the most distinct summary of the service/program and add details at the end. Imagine a ‘newsletter style’ that starts with the most important information in a story and then goes on to the details in order of relevance, so that it can be “cut” at any point without completely losing the meaning.

DATA ELEMENT: SERVICE/PROGRAM – TARGET POPULATIONS

| AIRS Standards Name | AIRS Standards Requirement | AIRS XSD Name | iCarol Field Name |
|---------------------|----------------------------|---------------|-----------------------------|
| Target Populations | *Required* | | Categorization, Eligibility |

DEFINITION

This refers to the individuals for whom a particular service or group of services is intended. Target populations are generally described in narrative form (e.g. “Targeted, but not restricted to, Native Americans”) in the eligibility or description fields. Target populations can also be pinpointed when indexing by choosing a Target Population term from the Taxonomy to append to the selected service term(s).

DATA ELEMENT: SITE SERVICE/AGE REQUIREMENTS

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|---------------------|----------------------------|------------------------------|------------------|------------------------|
| None | N/A | SiteService/Age Requirements | Age Requirements | Include in Eligibility |

DEFINITION

This field allows for stating and filtering age requirements to assist in searching (for example, a service may be indexed to have a minimum and maximum age for eligibility).

AIRS XML COMPONENTS

| |
|-------------------------|
| AIRS XSD Name |
| Gender (Male or Female) |
| Minimum age |
| Maximum age |

DATA ELEMENT: SITESERVICE/GENDER REQUIREMENTS

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|----------------------------|-----------------------------------|---------------------------------|----------------------|--------------------------|
| None | N/A | SiteService/Gender Requirements | Gender Requirements | Include in Eligibility |

DEFINITION

This field allows for stating and filtering gender requirements to assist in searching.

DATA ELEMENT: SITESERVICE/FAMILY REQUIREMENTS

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|----------------------------|-----------------------------------|---------------------------------|----------------------|--------------------------|
| | | SiteService/Family Requirements | Family Requirements | Include in Eligibility |

DEFINITION

This field allows for stating and filtering family composition requirements to assist in searching.

DATA ELEMENT: SITESERVICE/INCOME REQUIREMENTS

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|----------------------------|-----------------------------------|---------------------------------|----------------------|--------------------------|
| None | N/A | SiteService/Income Requirements | Income Requirements | Include in Eligibility |

DEFINITION

This field allows for stating and filtering income requirements to assist in searching.

DATA ELEMENT: SITESERVICE/RESIDENCY REQUIREMENTS

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|---------------------|----------------------------|------------------------------------|------------------------|------------------------|
| None | N/A | SiteService/Residency Requirements | Residency Requirements | Include in Eligibility |

DEFINITION

This field allows for stating and filtering residency requirements to assist in searching.

DATA ELEMENT: SITESERVICE/OTHER REQUIREMENTS

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|---------------------|----------------------------|--------------------------------|--------------------|------------------------|
| None | N/A | SiteService/Other Requirements | Other Requirements | Include in Eligibility |

DEFINITION

This field allows for stating and filtering any other additional requirements to assist in searching.

DATA ELEMENT: SERVICE/PROGRAM – GEOGRAPHIC AREA SERVED

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|------------------------|----------------------------|------------------------------------|------------------------|-------------------|
| Geographic Area Served | *Required* | SiteService/Geographic Area Served | Geographic Area Served | Coverage area |

DEFINITION

Geographic Area Served (Coverage area) refers to the physical boundaries in which a service is available and by definition, not available to people outside of those boundaries. The concept of “area served” is different from “location” as a service may be located in one area but serve several definable areas or only serve parts of the one area.

This geographic “boundary” can be national, state-wide/province-wide, regional, countywide, citywide, comprise a single or several ZIP codes or be restricted to a specific neighborhood.

AIRS XML COMPONENTS

| |
|-----------------|
| AIRS XSD Name |
| ZIP/Postal Code |
| Census Tract |
| City |
| County |
| State/Province |
| Country |
| Description |

PREFERRED STYLE EXAMPLES

Coverage area style is set by the iCarol Coverage Area drop down fields. Once selected, coverage areas appear in the following format.

National coverage: United States
 Statewide coverage: CA – Statewide
 Multi-County coverage:

CA - Alameda County
 CA - Contra Costa County
 CA - San Francisco County

Countywide coverage: CA - San Francisco County

Coverage for a specific city: CA - San Francisco County - San Francisco

Coverage for a single zip code: CA - San Francisco County - San Francisco - 94110

Coverage for multiple zip codes:

CA - San Francisco County - San Francisco - 94110
 CA - San Francisco County - San Francisco - 94114
 CA - San Francisco County - San Francisco - 94131

ADDITIONAL INFORMATION

Please note that, in iCarol, a resource search using a ‘Resources Serving’ geo-filter will ONLY present resources that include the area indicated by the coverage area, so it is critical that each entry have a coverage area set and that the coverage area is only limited based on eligibility restrictions. If a coverage area is set for a smaller area, a resource search for a caller outside that coverage area will not present the resource. A resource search using a ‘Resources Serving’ geo-filter for ‘All cities’ in a county will only present resources available in ALL cities in that county, not resources available in any of the individual cities in that county.

For coverage areas to be recognized in the iCarol geo-filter, each coverage area must be added using the coverage area set of drop downs. The text description field is not recognized by the geo-filter tool.

DATA ELEMENT: SERVICE/PROGRAM – APPLICATION PROCESS

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|----------------------------|----------------------------|---------------------------------|---------------------|---------------------|
| Application/Intake Process | *Required* | SiteService/Application Process | Application Process | Application Process |

DEFINITION

The application process provides clients with information on the “next steps” to take to access a particular program/service.

PREFERRED STYLE EXAMPLES

Walk-in to apply

Walk-in for service

Call for Appointment - Appointment Required

Call for Appointment - Appointments Preferred, but Not Required

Call for Service (Service provided by phone)

Intake conducted Monday through Friday between 9am and 2pm; Phone during business hours for an intake appointment.

ADDITIONAL INFORMATION

In many cases, the directions are obvious in the sense of “call or visit” but many agencies have very specific requirements (for example, walk-ins will not be accepted, people must call first ... or there must be a professional referral).

DATA ELEMENT: SERVICE/PROGRAM – DOCUMENTS REQUIRED

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|---------------------|----------------------------|--------------------------------|--------------------|--------------------|
| Documents Required | *Required* | SiteService/Documents Required | Documents Required | Documents Required |

DEFINITION

This field lists documents that are required by the service provider at the outset of the application process (that is, material/information that needs to be taken to the agency in order to access the service).

PREFERRED STYLE EXAMPLES

None Required

Varies

Picture ID

Social Security Card or Number

Proof of Residence

Proof of Income

Birth Certificate

Medical Records

Driver’s License

Proof of Insurance

Proof of court mandate to attend batterers’ treatment service

[Add notes to these to be more specific about which medical record, whose birth certificates, what documents count as a proof of residence, or to indicate “Preferred, but not required”]

DATA ELEMENT: SERVICE/PROGRAM – FEE STRUCTURE

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|---------------------|----------------------------|----------------------------------|----------------------|-------------------|
| Fee Structure | *Required* | SiteService/Fee Structure Source | Fee Structure Source | Program Fees |

DEFINITION

The fee structure is an outline of the cost of receiving a service. If the service is free, this should be stated in the fee field.

Typical phrases include “sliding scale” and “no charge” or “fixed fee.”

PREFERRED STYLE EXAMPLES

No Fee

Set Program Fee – Call for details

Set Program Fee - \$35 registration fee, \$25 per class

Sliding Scale – Call for details

Sliding Scale - \$5 to \$25 per session

Sliding Scale if no insurance

May Be Paid By Third Party (see Method of Payment Accepted)

Membership Fee

Donation Requested but optional

ADDITIONAL INFORMATION

It is helpful to provide clients with some idea of fees when they are applicable but it can be difficult to effectively maintain that information.

DATA ELEMENT: SERVICE/PROGRAM – METHOD OF PAYMENT ACCEPTED

| AIRS Standards Name | AIRS Standards Requirement | AIRS XSD Name | iCarol Field Name |
|----------------------------|-----------------------------------|----------------------|--------------------------|
| Method of Payment Accepted | Recommended | None | Payment Options |

DEFINITION

The type of payment that is accepted for a particular service or service group where applicable.

PREFERRED STYLE EXAMPLES

No Fee Charged; No Payment Accepted

Direct Payment from Client

Healthy Families Accepted

Medicaid (MediCal) Accepted

Medicare Accepted

Military Insurance Accepted

Private Insurance Accepted

Scholarships Available

[A 2-1-1 services may include other local options, including the local Adult State/Local Health Insurance Program or specific private insurances]

DATA ELEMENT: SERVICE/PROGRAM – LANGUAGES OTHER THAN ENGLISH

| AIRS Standards Name | AIRS Standards Requirement | AIRS XSD Name | iCarol Field Name |
|------------------------------|-----------------------------------|----------------------|--------------------------|
| Languages other than English | *Required* | Languages | Languages Offered |

DEFINITION

Languages other than English in which the service is provided.

ADDITIONAL INFORMATION

See Appendix B for Preferred Language Spellings.

DATA ELEMENT: SERVICE/PROGRAM – TAXONOMY TERM(S)

| AIRS Standards Name | AIRS Standards Requirement | AIRS XML Reference | AIRS XSD Name | iCarol Field Name |
|---------------------|----------------------------|---------------------------|---------------|-------------------|
| Taxonomy Term(s) | *Required* | SiteService/Taxonomy Term | Taxonomy | Categorization |

DEFINITION

This refers to the indexing term name(s) and associated code(s) drawn from the AIRS/211 LA County Taxonomy whose definition most closely matches the service being defined.

ADDITIONAL INFORMATION

The Taxonomy uses the fixed language structure embedded as a separate XML within the AIRS/211 LA County Taxonomy. There are no format restrictions in the XSD in regard to taxonomy codes, therefore it is important that Target and Modality codes are only applied after a Taxonomy code is used.

DATA ELEMENT: SITESERVICE/RESOURCE INFO

AIRS XML Reference: SiteService/Resource Info

AIRS XML COMPONENTS

| |
|-------------------------|
| AIRS XSD Name |
| Contact |
| Resource Specialist |
| Available for Directory |
| Available for Referral |
| Available for Research |
| Date Added |
| Date Last Verified |
| Date Last Action |
| Last Action Type |

The general rules listed under Agency – Date of Last Interim Modification/Partial Update; Contact for Updating Purposes also apply here.

DATA ELEMENT: SERVICE/PROGRAM – WEBSITE(S)/URL(S)

| AIRS Standards Name | AIRS Standards Requirement | AIRS XSD Name | iCarol Field Name |
|---------------------|----------------------------|---------------|-------------------|
| Website(s)/URL(s) | Recommended | | Website |

DEFINITION

The agency URL (Universal or Uniform Resource Locator) should be the official main website of the organization. A service URL should only be included if it is unique to the service/program.

The general rules listed under *Agency – Website(s)/URL* also apply here.

DATA ELEMENT: SERVICE/PROGRAM – E-MAIL ADDRESS(ES)

| AIRS Standards Name | AIRS Standards Requirement | AIRS XSD Name | iCarol Field Name |
|---------------------|----------------------------|---------------|-------------------|
| E-mail Address(es) | Recommended | | Main Email |

DEFINITION

E-mail refers to an electronic mail address; a place to direct online/electronic correspondence.

The general rules listed under *Agency – E-mail Address(es)* also apply here.

DATA ELEMENT: SERVICE/PROGRAM – TITLE OF THE SERVICE CONTACT PERSON

| AIRS Standards Name | AIRS Standards Requirement | AIRS XSD Name | iCarol Field Name |
|-------------------------------------|----------------------------|---------------|--------------------|
| Title of the Service Contact Person | Recommended | | Main Contact Title |

DEFINITION

This is the individual that is the contact for the provision of service (for example, the Program Coordinator). This is only included when there is a particular reason, usually this level of detail is not needed.

The general rules listed under *Agency – Name and Title of Director of Administrator* also apply here.

DATA ELEMENT: SERVICE/PROGRAM – SERVICE CAPACITY AND TYPE

| AIRS Standards Name | AIRS Standards Requirement | AIRS XSD Name | iCarol Field Name |
|---------------------------|----------------------------|---------------|-------------------|
| Service Capacity and Type | Recommended | | Capacity Type |

DEFINITION

This refers to the “amount” of capacity available and the “type” of that capacity.

PREFERRED STYLE EXAMPLES

- 30 Beds
- 4 Overnight beds
- 16 Respite care spaces
- 30 Subsidized childcare spaces
- 12 Training spaces per course
- 6 Counseling sessions
- 12 Participant limits
- 18 Subsidized housing – One bedroom
- 2 Subsidized housing – Wheelchair accessible

ADDITIONAL INFORMATION

Note that this can often be briefly included within description field when it might be helpful (for example, 30-bed emergency shelter).

The variations of this information are lengthy and it is probably only useful to the client, where there are recurring restrictions on access based on demand exceeding supply.

This is not always meaningful information unless it has a great deal of additional context. For example, obviously a 400 bed hospital cannot have 420 people staying overnight. But it might have only 200 people staying there but still have shortages if the main demand is for ICU or pediatric beds and these are full. The definitions of units of service and the volatility of “capacity” information for any given program make maintaining this information extremely problematic.

SECTION 5 – APPENDIX: PREFERRED HUMAN SERVICES SPELLINGS AND USAGES

GENDER-NEUTRAL (NON-SEXIST) LANGUAGE

Eliminate use of “man”, (for example, man-made disaster, mankind: use disaster of human origin, humanity, people, human beings)

Occupations: firefighters, not firemen; flight attendants, not stewardesses; police officers, not policemen and police women, chair, chairperson or presiding officer, not chairman.

Pronouns: 1) Recast sentences in the plural: help people meet their needs, not help the individual meet his or her needs. 2) Reword sentences to eliminate gender reference altogether: the average person is worried about income, not the average person is worried about his income.

Although “girls” is appropriate for adolescent and younger females, “women” should be used when referring to adults (not ladies).

RESPECTFUL LANGUAGE

Avoid language about people with disabilities that is demeaning, (for example, afflicted, crippled, invalid, suffering from).

People with disabilities, not handicapped people, disabled people or the disabled

People experiencing homelessness or people without housing, not homeless people or the homeless

People who are blind, people who are deaf, not deaf people, blind people, the deaf, the blind

People who have epilepsy, not epileptics; people with dyslexia, not learning disabled

Uses a wheelchair, not wheelchair-bound

Accessible bathroom stall, accessible parking space, not handicapped bathroom stall, disabled bathroom stall, handicapped parking space, disabled parking space

Most disabilities are not a disease. Do not call a person with a disability a "patient" unless referring to a hospital setting. In an occupational and physical therapy context, "client" is preferred.

Some diseases, by legal definition, are considered disabilities. Victimization imagery ("AIDS victims") or defining the person by the disease ("she is a diabetic") is still inappropriate. Use "person with diabetes" or "people living with AIDS."

"Blind" refers to total loss of eyesight; "low vision" or "visual disability" is more accurate for people who have some degree of sight. Avoid "non-sighted."

For people with speech disabilities, avoid "mute," "dumb," or "speech impediment."

Avoid "deformed," "deformity" and "birth defect."

Down syndrome is a chromosomal condition that causes developmental disability. Use "person with Down syndrome." Avoid "mongol" or "mongoloid."

Mental disabilities include cognitive, psychiatric and learning disabilities and physical head trauma. Avoid "mentally retarded," "insane," "slow learner," "learning disabled" and "brain damaged."

Cerebral palsy is a disability resulting from damage to the brain during birth that causes muscle incoordination. Avoid "palsied" and "spastic."

A seizure is an episode caused by a sudden electrical disturbance in the brain. If seizures are recurrent, it is called a seizure disorder. Use "person with epilepsy" or "child with a seizure disorder." Avoid "epileptic," either as a noun or adjective.

Avoid "dwarf" or "midget." Some groups prefer "little people," but it's best to use "person of short stature."

Quadriplegia is a substantial loss of function in all four extremities. Paraplegia is a substantial loss of function in the lower part of the body. Use "man with paraplegia" or "she has quadriplegia." Avoid "paraplegic" or "quadriplegic" as either a noun or adjective.

Use non-disabled rather than normal for people who do not have a disability, or "typically developing" when referring to children who are not experiencing developmental delays.

Native American, not Indian or American Indian

The term Asian American is preferable to Asian when speaking of American nationals of Asian descent. Asians are Asian nationals; Asian Americans are Americans of Asian descent who possess their own distinct cultures in this country.

Sexual orientation, not sexual preference

NUMERALS

Use figures rather than words when the number refers to a date, the time of day, an age, a percentage or money.

Use figures when there is a range of numbers (for example, people age 8 years to 15 years).

In all other cases, spell out numbers one through nine and use figures for 10 and above.

In a series, follow the above rules: They had 10 dogs, six cats and 97 hamsters; They had four four-room houses, 10 three-room houses and 12 10-room houses.

When using the ordinal form of the number, spell out first through ninth and use figures starting with 10th (for example, "first", "third", "11th", "20th")