

# **Taxonomy Supplements: How to Keep the *AIRS/INFO LINE* Taxonomy Updated for Your Resource File**

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*The AIRS/INFO LINE Taxonomy continuously evolves to incorporate the human service delivery system and address the needs of users. The Taxonomy's developer discusses measures which users can undertake to keep the indexing of their own resource files in synch with the most current release of the published Taxonomy.*

INFO LINE of Los Angeles works continuously on the structure and contents of the *AIRS/INFO LINE Taxonomy* to accurately reflect the ever changing service delivery system and meet the needs of users. Ideas for updates come from a variety of sources including suggestions from users, input from reviews of the Taxonomy by subject area experts, terminology from other classification systems, and newspaper articles on services.

Changes and additions are distributed to users in the form of supplements, usually at 18-month intervals. The supplements organize update information by Taxonomy code and describe specific changes that users need to make in order to keep their working copies of the Taxonomy current. Two supplements have been distributed since the third edition. Eventually, INFO LINE hopes to post supplement information on our website so that Taxonomy purchasers can download changes as they are finalized rather than having to wait for a published document.

Some modifications will be more important to a particular agency than others will. Which those are will depend, for the most part, on the terms that agency has used to index records in its resource file and the new concepts it may need.

The ease with which an agency can incorporate changes will depend heavily on the utilities its software provider has made

available. The tools that INFO LINE provides and those to discuss with software vendors are described in the Taxonomy Maintenance Tools section below.

### ***Types of Updates***

- 1. New Taxonomy Terms:** The most frequent type of update is the addition of new terms—concepts not previously included. New terms may represent new types of services not previously available (*Family Support Centers* or *Internet Courses*) or types of services the Taxonomy has not covered before (*Adult ESL Tests*). New terms always have associated codes and definitions and may have one or more use references (synonyms) and see also references (if related concepts exist in other parts of the Taxonomy).  
**Examples:** The most recent supplement added *Prisoner Locator Services* as a new term with a code, a definition, a see also reference to *Correctional Facilities*, but no use references. *Accent Reduction Classes*, another new term requested by a user, has a code, a definition, and a see also reference to *English as a Second Language*. *BIA Schools* was added to meet the needs of I&R providers in states like New Mexico with large Native American populations. It has a code, a definition and one use reference: *Indian Schools*.  
**Impact on the Resource File:** New terms don't impact the integrity of a resource file. Agencies will simply add them to their Taxonomy and use them if they're relevant to the contents of their database or leave them deactivated if they aren't. (Unless an agency has major space problems or no other way to deal with terms they don't wish to use, it should have the full Taxonomy in its database. One can never know when they'll need an inactive term!) Agencies should ensure that resource and telephone staff are aware of additions they plan to use or have used.
- 2. New See Also References:** When we become aware of previously unnoticed relationships between terms in different parts of the Taxonomy, we highlight them with new see also references.

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

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

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

Examples: *Needle Exchange Programs* is a new use reference for *AIDS Prevention Kits*. *Gift Distribution* is a new use reference for *Christmas Gifts*. *Garden Clubs* is a new use reference for *Horticultural Societies*.

Impact on the Resource File: New use references can be added without concern for the integrity of an agency's file. Like the see also references, they are a supportive component. They are important only if an agency has synonym access to the taxonomy terms used in its file. (NOTE: synonym access is the ability to conduct a keyword search for a Taxonomy term using a synonym and have the software display the preferred term. If one were to type in *Garden Clubs* or *Garden*, the system would recognize the relationship to *Horticultural Societies* and display that term for selection for search. Not all software packages provide this feature.)

4. **Definition Changes:** The most common type of changes to the Taxonomy are definition changes, which are made for a number of reasons:
- to describe a particular service or target group using a more authoritative source;
  - to provide a more readable or accurate definition;
  - to broaden the concept to cover additional relevant instances;

- or to clarify the borderline between one concept and another.

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

Examples: The definition for *Consumer Fraud Reporting* was modified to include an explicit reference to fraud reporting following a disaster. The definitions for *Guardianship Assistance* and *Conservatorship Assistance* were modified to reflect the different utilizations of these concepts in different states. The definition for *Estate Planning Assistance* was modified when the category was greatly expanded and subset concepts (*Advance Medical Directives* and *Life Care Planning*) were added. Many of the definitions in the **PH** section were modified in an extremely minor way to replace the word *caretakers* with *caregivers*.

Impact on the Resource File: While definition changes can be added without concern for the integrity of a file, it is important that both resource and referral staff are aware of them, particularly if the scope of a concept has been modified. Agencies may want distribute a memo enumerating changes or develop training that brings people up to date.

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

Examples: *Basic Subsistence* was changed to *Basic Needs* to provide greater accessibility—many people didn't know what *Basic Subsistence* meant. *Snow Shoveling* was changed to *Residential Snow Shoveling* to avoid confusion

with *Snow Removal*, which pertains to public streets. *Integrated Preschools* was changed to *Inclusive Preschools* on the advice of our special education expert. *Postal Alert* was changed to *Gatekeeper Alert Programs* because the latter is inclusive of programs offered by agencies other than the post office (but *Postal Alert* was added as a use reference to the new term to preserve access via that avenue).  
Impact on the Resource File: Term name changes have no impact on the integrity of a resource file unless they also involve a code change. They can, however, affect resource and referral staff who had become familiar with old wording. Agencies implementing term name changes need to alert their staff to the changes.

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

Examples: The entire *Home Maintenance Services* and *Yard Work* sections of the Taxonomy (12 terms in all) were moved from the **BH** section to the **PH** section and joined with other in-home services as a result of our aging review. The new section makes a lot of sense, but the changes were extensive. When the *Estate Planning Assistance* section was developed, we needed to move several terms into it, including *Will Preparation Assistance*, *Living Will Preparation Assistance*, and *Durable Power of Attorney for Health Care*. All of these required code changes. Our education expert told us it was simply wrong to have *Special Education Support* services under *Guidance and Counseling* and that *Special Education Support* was the wrong wording for the concept. We created a new section called *Disabled*

*Student Services* (the correct wording for the concept) and moved affected terms over as subsets. Other major revisions have involved a new disaster services section, elimination of *Environmental Protection* as a level II concept, and the upcoming modifications in the **PF** (*Family Substitute Services*) section which had not been reviewed or revised for 13 years.

Impact on the Resource File: Code changes have a major impact on the integrity of an agency's resource file if the codes have been used in agency, service, or program records. Most software packages don't allow users to make code changes in their Taxonomy database until staff have changed the codes in the corresponding records in the resource file. If staff make changes in their taxonomy table without first updating the records, they run the risk of leaving "stranded" codes in the resource file, and they may have trouble getting rid of them. If staff have not used a term whose code has been changed, they can delete the old code and add the new one without a problem. Code changes, while time-consuming, are fairly straightforward one-for-one changes—replacing a single old code with a single new one. Refer to the Taxonomy Maintenance Tools section below for a description of the type of utility which software vendors may provide to automate this process and for suggestions on how to make code changes if you have no utilities.

7. **Deletion of Terms:** Very rarely, there is a need to delete a Taxonomy term when a type of service no longer exists or when a Taxonomy concept is being split into two or more new concepts. Terms may also be deleted (and re-added as use references) when a section is simplified. When terms are deleted, the supplement provides one or more suggestions for replacement terms.

Examples: *Infant Stimulation* and *Civil Defense* are examples of services that simply do not exist any longer. The former has been replaced by early intervention programs and the latter by the complex emergency response system managed by FEMA and state offices of emergency services. *Adolescent Inpatient Mental Health Care* is an example of a

term that was deleted when the concepts of *Children's/Adolescent Psychiatric Hospitals* and *Adolescent Inpatient Psychiatric Units* replaced it. The supplement instructs users to select one of the new terms to replace the old one. When the *Childbirth Education* section was revised based on input from a subject area expert, the terms *Bradley Classes* and *Lamaze Classes* were deleted and users instructed to use *Prepared Childbirth* instead. The old terms became use references for the new, more up-to-date one. This is an example of simplification creating a deletion.

Impact on the Resource File: Term deletions may have a major impact on the integrity of a resource file if the deleted terms have been used. Deletions may be more complex than simple code changes, because many deletions cause one-to-many changes—one old code being replaced by two or more new ones. Before deleting any terms, an agency should do a thorough search to determine whether they've been used in their resource file. If a term has been used which is being replaced by multiple terms, staff must individually reindex all records containing the old code, one by one.

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

Example: *Storm Shutters* and *Storm Windows* were deleted as use references for *Weatherization* when *Storm Windows/Shutters* was added as a term in the **PH** section. *Tax Forms* was eliminated as a use reference for *Tax Assistance* when it became a term in its own right under *Tax Assistance*.

Impact on the Resource File: It's important to delete use references, especially if they are being added as Taxonomy terms in their own right. If agencies fail to delete a use reference and then attempt to add it as a preferred term, at best their system will tell them they can't and force them to do the deletion first. At worst (if software systems have no protection against duplicate terms), agencies may end up

with preferred terms that are also use references—a very confusing situation for users.

9. **Deletion of See Also References:** See also references are deleted when they are misleading or unnecessary or when a section has been restructured and the concepts referenced by them are now included in the same section. This type of deletion is very rare.

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

Impact on the Resource File: Deletion of see also references is not important to the integrity of a system, but agencies may want to make the deletions just to stay current.

### ***Taxonomy Maintenance Tools***

A number of tools are available to help keep an agency's Taxonomy current. The most important ones are utilities that may be provided by software vendors. INFO LINE of Los Angeles provides two types of data files that can be used with these utilities, either directly by agencies or by vendors.

Ideally, the vendor should provide the agency with two different types of utilities which will automate the process of keeping their Taxonomy current: a global search and replace utility (which automates the replacement of old codes with new ones in resource file records and then updates the Taxonomy database) and a Taxonomy reload utility (which replaces the current version of the Taxonomy with a new one containing all additions, changes and deletions). The global search and replace utility should also help agencies process codes that have been deleted. INFO LINE provides software vendors with a Taxonomy history file, free of charge. The history file contains all terms whose codes have been changed, listing the old code and the new code and including any term name changes. A separate section of the file contains all deleted terms and the codes for replacement options. The vendor's global search and replace utility refers to the old code in the Taxonomy history file,



finds all instances of that old code in the resource file records, replaces the old code with the new code, and updates the Taxonomy database when complete. The utility can also search for instances of deleted codes, display replacement options, and allow agencies to choose the correct option on a record-by-record basis. The utility then deletes the defunct Taxonomy term.

INFO LINE also provides an ASCII delimited version of the Taxonomy file which separates Taxonomy elements (code, term, definition, use references, see also references) so that a program can be written to load the Taxonomy into a database. Whenever INFO LINE updates the Taxonomy and publishes a supplement, a new ASCII delimited file incorporating the changes is also produced. Agencies should check with their software vendor to see whether this file can be used to automate updating their Taxonomy file. The vendor may provide a Taxonomy reload utility to reload the Taxonomy from the updated ASCII file, making an agency's copy of the Taxonomy current. The reload utility should always be run after the global search and replace utility unless the agency has not used any codes which have been changed or deleted.

Agencies need to ask their software vendor about the availability of Taxonomy maintenance utilities. It's also important to make sure that the reload utility actually replaces the old version of the Taxonomy with a new one. If it simply adds new records or changes old ones, it will miss deletions of see also and use references which may cause trouble down the line.

### ***Software Packages Which Don't Have Taxonomy Maintenance Tools***

If their software package lacks Taxonomy maintenance utilities, agency staff will have to make the changes themselves based on instructions in the supplements. The only tricky part is handling code changes and deletions. Agencies should try the following:

- For each Taxonomy term whose code is being changed, searching the resource file and making a list of all records in which the term has been used.
- Going into the Taxonomy file and adding "-Old" to the Taxonomy term name for terms whose code is being changed. This allows agencies to enter the term under

the new code if the name is not also being changed. (Software should not allow two Taxonomy terms to have identical names).

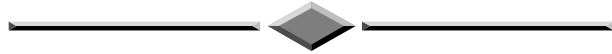
- Creating new entries in the Taxonomy database for the new codes. If the code for *Mobile Canteens* is being changed from **BD-180.820-33** to **TH-260.645-55**, the database will now have two entries: **BD-180.820.33** for *Mobile Canteens-Old* and **TH-260.645-55** for *Mobile Canteens*. If there are higher level terms above the new code, those will also have to be added to provide for full branching. Before the new code for *Mobile Canteens* can be added, for example, staff will need to add *Post-Disaster Food Services (TH-260.645)*, the new higher level term under which *Mobile Canteens* is now located. But before that term can be added, the term *Disaster Relief Services (TH-260)* under which it resides will have to be added.
- Going into each of the entries in the resource database containing the old term and changing it to the new term.
- Running the search again to ensure that all entries have been converted.
- Deleting the old term.

### **Local Modifications**

Whether they are using a software utility or making changes in their Taxonomy on a term by term basis, it is very important for agencies to keep track of any local modifications they've made in the Taxonomy. For example, agencies not located in California may have changed the name of the term for code **NL-500.500** from *Medicare/MediCal* to *Medicare*. If these agencies reload the AIRS/INFO LINE standard edition from the ASCII diskettes, their local changes will be overwritten. Consequently, staff either need to extract these local changes and reload them following the ASCII updating process or to re-enter the changes by hand. Agencies should ask their software vendor whether their system has an extract/reload utility that will handle selected information.

The other settings agencies will want to preserve are the active/inactive settings for individual Taxonomy terms. If an agency's software has the capability of de-activating terms, the

agency should ask their software vendor whether these settings will be affected by running the Taxonomy maintenance utilities provided.



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