Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

District of Columbia Health Information Exchange Policy Board

**Recommendations on Operational Best Practices
for the DC Community Resource Inventory**

I. SUMMARY

HIE Policy Board Community Resource Inventory subcommittee proposes the publication of best practices for the DC Community Resource Inventory (CRI) on Inclusion/Exclusion (I/E) criteria and the CRI Style Guide. This activity is in response to a previously approved recommendation on operational elements for the DC CRI. These best practices include work completed by the DC Positive Accountable Community Transformation (PACT) CRI Action Team as well as updates from recent subcommittee discussions. Given that these operational elements are likely to change over time, the subcommittee also recommends that these practices be updated on a regular basis. Together, these best practices aim to support the long-term availability of information regarding community resources in the District.

II. PROBLEM STATEMENT

The CRI subcommittee developed two (2) recommendations that were approved by the HIE Policy Board in July 2023. These recommendations included operational elements regarding content collection, management, and curation.

Following the approval of these recommendations, the subcommittee determined that there was a need to address some open operational questions. Specifically, these questions centered around the inclusion of certain services (such as payer organizations, hospital services, and geographic limits to services), formatting of service record information, as well as common terms and definitions for inclusion within the larger DC HIE glossary. The subcommittee determined that these best practices were critical to ensure that the CRI is responsive to the needs of District residents and stakeholders.

III. SUBCOMMITTEE GOAL AND ACTIVITY

This activity can be added under the subcommittee's overall goal to develop recommendations for consideration by the HIE Policy Board that are related to the use, exchange, sustainability, and governance of community resource directory data through the District HIE infrastructure.

IV. DISCUSSION

The HIE Community Resource Inventory (CRI) Subcommittee proposes the following best practices related to the DC CRI. These best practices are located in *Appendix 1*. To develop these best practices,

the subcommittee reviewed existing documents that were originally developed in Phase 1 of the DC Community Resource Information (CoRIE) initiative. The subcommittee also researched several industry standards as outlined by Inform USA (formerly known as the Alliance of Information and Referral Systems or AIRS) and any exchange specifications identified by the Office of the National Coordinator for Health IT (ONC) Interoperability Standards Advisory (ISA). These items are described below in further detail:

- *Inclusion and Exclusion (I/E) Criteria*: Inclusion/Exclusion criteria represent a set of characteristics that determine if a social service should be listed in the DC CRI. Such a policy outlines the scope and limitations of any resource database. The uniform application of these criteria ensures reliability of the organizations and services listed in the CRI. The subcommittee reviewed the previously established I/E policy and made decisions on the following:
  - Inclusion of payer, hospital, and web-based educational services;
  - Geographical limits to services displayed on the CRI; and
  - Special considerations and exceptions to the I/E criteria.

- *Style Guide*: A Style Guide is a set of policies that is used by the DC CRI to ensure that all social care organizations and services have a clear and consistent structure. This includes rules for phrasing free-text service descriptions, person-first terminology, and other requirements for data fields for services listed in the DC CRI. The subcommittee voted to include the existing CRI style guide without any changes as part of best practices.

As mentioned in the subcommittee's previously approved recommendation in July 2023, the subcommittee underscored the importance of updating operational practices on a regular basis, while also ensuring the involvement of community stakeholders in the process. To that end, the subcommittee also discussed an annual review of these best practices to ensure that they remain responsive to the needs of District residents while ensuring alignment with the latest industry/national standards. Upon approval by the Policy Board, the finalized set of best practices will be posted on the DHCF HIE website.

V. RECOMMENDATION(S) FOR BOARD ACTION

The Community Resource Inventory (CRI) subcommittee proposes that the DC HIE Policy Board approve the best practices on Inclusion/Exclusion (I/E) criteria and the CRI Style Guide in *Appendix 1* for publication on the DHCF website.

<p align="center">***</p>

The HIE Policy Board approved all best practices listed in Appendix 1, with the exception of the 'Contact Name' section of the style guide, as several gendered or honorific titles for names may be preferable for many individuals. The Board advises the CRI Subcommittee to revisit and revise this section for consideration at future HIE Policy Board meetings.

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

Committee Members: Ms. Luizilda DeOliveira, Mr. Khalil Hassam, Mr. Luis Diaz, Ms. Stacey Johnson, Dr. Eric Marshall, Ms. Tamara Moore, Mr. Greg Bloom; Mr. David Poms, Ms. Sabrina Tadele, Ms. Ariana Wilson, Mr. Tommy Zarembka, Mx. Deniz Soyer, Ms. Asfiya Mariam

Appendix 1: Best Practices

Best Practices – Inclusion / Exclusion Criteria

Best Practices – Style Guide

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

Best Practices – *Inclusion / Exclusion Criteria*

The HIE Community Resource Inventory (CRI) subcommittee recommends the following best practices for Inclusion/ Exclusion criteria for the DC Community Resource Inventory (CRI). These represent recommended practices for the District's Designated HIE entity in maintaining the DC CRI. As with any policies or best practices for the DC CRI, the Inclusion/Exclusion (I/E) criteria should aim to address the needs of District residents.

These best practices were derived from existing national standards outlined by the Office of the National Coordinator for Health IT (ONC) [Interoperability Standards Advisory (ISA)](), the initial set of I/E criteria developed by the CRI Action Team, and the Alliance of Information and Referral Systems (AIRS) or [Inform USA]() standards.

General

- The I/E policy may choose to prioritize services and/organizations that are frequent recipients of referrals.

- The organization is encouraged to develop a policy for appeals for any social care organizations and/or services that may not appear in its database.

- The organization is encouraged to publicly share its I/E policy in an accessible location (for example, on its website).

Types of Organizations and Services that are Included

- The CRI should include all social care organizations that are accessible to District residents, including all appropriate services located in neighboring states within a fifteen (15) mile radius.

- The CRI should include non-profit organizations that are located in the District that offer free or low-cost services. These can include, but are not limited to:
  - Governmental agencies and programs;
  - Organizations that provide health and social services;
  - Community associations and social clubs that offer services to the community at-large; and
  - Organizations that offer education, library, employment, legal, and recreational services.

- The CRI should include licensed hospitals, health clinics, personal care homes and specialty outpatient departments (such as infectious disease, cancer, cardiology) that offer services for low-income patients.

- The CRI may choose to include for-profit organizations, non-profit self-help groups, and mutual aid groups when they offer free, low-cost, or sliding scale services.

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

- The CRI may choose to include the following services with appropriate labelling and access information such that individuals are able to select a service that best meets their needs:
  - Payer organizations with any services they have for the community at-large;
  - Clinical and non-clinical hospital-based services that are directly accessible to residents;
  - Faith-based organizations that offer services to the community;
  - Advocacy organizations or grassroots efforts; and
  - Web-based self-paced courses or other similar educational offerings.

Excluded Organizations and Services

- The CRI should not include organizations that explicitly deny services on the basis of color, race, religion, gender, sexual orientation, ancestry, gender identity, or nationality.

- The CRI should not include any organizations that provides services to its own members (such as a faith-based organization that only offers food pantry services to its members).

- The CRI should not include:
  - Private medical, behavioral health, and social work practices that do not accept Medicaid or offer programs for low-income individuals;
  - Organizations that are unlicensed to offer services for which licensing is typically required;
  - Organizations that have not been in existence for at least one (1) year; and
  - Housing services that do not have oversight by a governmental or regulatory body.

Special Considerations

In special instances (such as a public health emergency), the CRI may choose to include for-profit organizations that offer critical services (such as COVID-19 vaccinations from Walgreens or CVS). In such cases, the organization responsible for managing the CRI must ensure that exceptions are uniformly applied to all organizations.

The following questions may be considered when determining if an exemption to the I/E policy should be applied:

1. Can any member of the public access the organization/service?
2. Is the organization/service considered 'unique' or 'critical' (for example, language translation or mental health services)?
3. Does the organization/service charge any fees (including donations) as a pre-requisite to accessing services?
   a. If yes, does the organization/service offer a sliding scale for low-income individuals?
4. Does the organization/service have the capacity to address a large number of referrals?
5. If the organization has not been in existence for at least one (1) year, is the organization backed by a governmental entity?

Updates

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

In accordance with AIRS or Inform USA standards, any I/E policies established by the DC CRI should be reviewed on an annual basis. This includes, but is not limited to:

- Reviewing top recipients of referrals;
- Examination District assessments to ensure that services listed are responsive to the needs of District residents; and
- Coordination with District data stewards to incorporate any resources that are deemed relevant.

Any changes or updates to the I/E policy should be reviewed and approved by the DC HIE Policy Board.

Best Practices – *Style Guide*

DC CRI Style Guide Based on the AIRS Style Guide (2021)
Licensing and usage terms and conditions for the AIRS Style Guide
Adapted by the DC Primary Care Association for the DC CoRIE project, 2021

Data Structure
Data Model
The basic structure of most resource databases, including this one, begins with the information on the Organization that provides the services, the Locations from which one or more services are available, Phones, Contacts, and the Services themselves.

Organization		Services		Locations		Contact		Phones
Organization Info		Service Info		Location Info		Contact Info		Phone Info
Services		Programs		Phones		Phones		
Locations		Types		Schedule				
Phones		SDOH Codes						
Contacts		Locations						
		Contacts						
		Phones						
		Schedule						

Data Dictionary

Section	Element	Data Type	Status
Organization	Organization Name	string	Required
	Alternate Name	string	Required
	Description	long text	Required

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

	Email	email	Required
	URL (website)	string	Required
	Facebook URL	string	Recommended
	Twitter URL	string	Recommended
	Instagram URL	string	Recommended
	Tax Status	string	Recommended
	Website Rating	dropdown	Recommended
	Tax ID	string	Recommended
	Year Incorporated	string	Recommended
	Legal Status	dropdown	Required
	Code	string	–
	Organization Status	*backend*	–
Service	Service Name	string	Required
	Service Alternate Name	string	Required
	Organization Name	dropdown	Required
	Service Description	long text	Required
	Service URL (website)	string	Required
	Service Email	email	Recommended
	Eligibility Requirement	dropdown	Required
	Application Process	string	Required
	Fee Options	dropdown	Required
	Fee Details	string	Required
	Service Area	dropdown	Required
	Licenses	string	Recommended

	Wait Time	string	Required
	Accreditations	string	Recommended
	Code	string	–
	Service Status	*backend*	–
Program	Program Name	string	Recommended
	Program Description	string	Recommended
Types	Category Type	dropdown	Required
	Category Term	dropdown	Required
	Eligibility Type	dropdown	Required
	Eligibility Term	dropdown	Required
	Detail Type (i.e. required docs)	dropdown	Required
	Detail Term	dropdown	Required
SDOH Codes	SDOH Categories	checkbox	–
	SDOH Conditions	select	–
	SDOH Rank	dropdown	–
Contact	Contact Name	string	Required
	Contact Service	dropdown	Required
	Contact Title	string	Required
	Contact Department	string	Required
	Contact Email	email	Required
	Contact Visibility	dropdown	Required
Location	Location Name	string	Required
	Location Alternate Name	string	Required
	Location Transportation	string	Recommended
	Location Description	long text	Recommended
	Location Service	dropdown	Required

	Address	string	Required
	City	dropdown	Required
	State	dropdown	Required
	Zip Code	string	Required
	Location Details	string	Recommended
	Regions	dropdown	Recommended
	Accessibility	dropdown	Recommended
	Accessibility Details	string	Recommended
Schedule	Regular Opens (M-S)	time dropdown	Required
	Regular Closes (M-S)	time dropdown	Required
	Regular Closed All Day (M-S)	checkbox	Required
	Holiday Start	date	Required
	Holiday End	date	Required
	Holiday Opens	time dropdown	Required
	Holiday Closes	time dropdown	Required
	Holiday Closed All Day	checkbox	Required
Phone	Phone Number	string	Required
	Phone Extension	string	Required
	Phone Type	dropdown	Required
	Phone Language	dropdown	Required
	Phone Description	string	Required
	Main (check box)	checkbox	Required

Organizations

An organization is an entity that delivers services. An organization can be incorporated, a division of government, or an unincorporated group that offers, for example, a food pantry or support group. The organization operates from the main location where the administrative functions occur, where the organization's director is generally located and where it is licensed for business. An organization may or may not deliver direct services from this location.

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

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On occasions, Data Steward services may choose to designate a middle level of the organization as the organization. For example, a county Department of Human Services may offer dozens of services but is often recognized by the names of its component programs such as Social Services, Health Department, etc. It is acceptable to use those components as 'organizations' as long as their relationship to the larger Department of Human Services and the county itself is acknowledged in the description or by the way the data record is structured.

Organization Name

This is the name of an organization that provides services that are included within the resource database. It is the name that an organization uses to identify itself and by which it is best known to others. In most cases, this will be its full legal name but it may be the name under which the organization is more commonly known or is "doing business as" – for example, YWCA instead of Young Women's Christian Association. (An organization might also have an **alternate name**; this is addressed below.)

Preferred style examples
- Abacus Child Care Center
- Anytown Parks and Recreation Department
- Arizona Department of Labor
- Big Brothers and Big Sisters of Anytown
- Burton D Morgan Foundation
- Evergreen Youth Services
- Gathering Place
- George Dodge Intermediate School
- Saint Jude's Emergency Shelter
- Saint Vincent de Paul Society
- South Carolina Department of Health
- Yellow County Social Services Department
- YMCA Bluetown

Guiding information
- Use full names without abbreviations and ampersands (for example, Anytown Parks and Recreation Department rather than Anytown Parks & Rec. Dept.).
- 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 organizations called "The X …" and "The Y …".
- 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 – and the name provided to you by the organization – may include legal words or phrases (such as "Inc") that are not relevant and not part of the everyday name. When this is the case, omit them. However, in these examples, the organization itself may insist on their preference. A database administrator can argue that the key factor is user-friendliness but in the long run, it is best to maintain positive relations with the listed organization and respect their request. In these instances, make use of the Alternate Name field to accommodate an additional naming convention.

- Use apostrophes in the same manner as the organization, but use a version without the apostrophe in the Alternate Name field (for example, Saint Jude's Emergency Shelter with Saint Judes Emergency Shelter as an Alternate Name), to help seekers who may difficulty handling apostrophes in searching.
- When entering names of government organizations, be consistent in the naming structure for divisions of the same level of government throughout the database. For example, Sycamore County Public Health Department rather than Public Health Department of Sycamore County, which would lead to similar stylings such as Sycamore County Social Services Department. As a general rule, always structure these records with the level of jurisdiction listed first (for example, Arizona Department of Motor Vehicles or Armstrong County Sheriff's Department). This way, the organizations within a resource database appear in a single list, and all of those government records will be grouped together in a consistently logical fashion.
- If the common name is an abbreviation, omit the punctuation (for example, ARC rather than A.R.C.). This holds true if the organization or the location name is taken from someone's initial (for example, CJ Correctional Facility rather than C.J. Correctional Facility).
- 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, AZ Department of Labor; US Postal Service).
- Follow the way an organization consistently spells out its name in regular text, rather than how it might appear on its corporate logo which may play with capitalization, abbreviations and punctuation for design reasons.
- 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 with the full name going into the Alternate Name field.

As with all of these "style preferences," in the area of organization names, there will often be exceptions to every rule.

Alternate Name

An **alternate name** is another name by which an organization, location or program may be commonly known. An organization name, location name or service name may have an alternate name which is an acronym, former name, popular name, legal name, doing business as name, or some other alternative. An alternate name may also be any type of name under which the organization, location or service might reasonably be searched by a user (such as a variation in spelling conventions). 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 alternate names.

If an organization does not commonly use its full legal name, then that legal name should be included as an alternate name with the designation (legal name) indicated. Similarly, a former name should also be labelled as not everyone might be aware of the name change.

The alternate names can sometimes also be used to "flip" preferred name "stylings" around if desired. 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 alternate name.

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

Preferred style examples
- Anytown Recreation Division
- Anytown Big Brothers and Big Sisters
- Anytown YMCA
- Big Sisters Anytown
- EYS
- Northtown Home Care Association (former name)
- Jude's Place
- Saint Judes Emergency Shelter
- St Jude's Shelter
- Info Greentown
- Community Information Center of Greentown (legal name)
- St Vincent de Paul Society

Organization Description

The organization description is a summary of the organization's primary purpose and mission. It is a helpful way of understanding the broad nature of an organization if its name is not well known or its purpose is not very evident from its title, and to highlight aspects that may not be commonly associated with that organization. **The description should be brief and not duplicate the more detailed service records.**

If an organization has an affiliation or a relationship with other organizations that might not be obvious from their title, then this should be mentioned here (for example, Hamilton Youth Services might be formerly affiliated with the National Boys and Girls Clubs).

Preferred style examples
- Children's mental health clinic
- Comprehensive employment center
- Emergency shelter for assaulted women
- Federal government financial assistance program for income eligible older adults
- Food pantry and meal program
- Multiservice organization operating a variety of neighborhood programs, services and supports
- Support services for assaulted women, including an emergency shelter
- Resources for veterans (online only)
- Social and recreational services for youth. Affiliated with Boys and Girls Clubs of America

Email

Email refers to a mail address for online communication. This should refer to the main email address of an organization (for example, info@organization.org rather than the email of an individual such as an Executive Director. The email address must be entered in the standard format of a valid email address (i.e. x@x.yyy).

Preferred style examples
- info@airs.org

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

- ymca@isp.net
- airs@info.org
- ourtowninfo@gmail.com

Website URLs

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 organization URL should be the official main website of the organization.

In most instances, the fixed structure should be along the lines of www.orgname.org … in other instances, the URL may point to a specific file/resource within an organization's website (for example, www.airs.org/standards.asp). Avoid using *http://*www ... (although there will be occasional websites that only use the http:// designation).

Preferred style examples
- www.airs.org
- www.arbitrary.com
- http://airs.org
- www.air.org/application.doc
- Resource Database: www.211ourtown/resourcedatabase
- Twitter: www.twitter.com/ourorganization
- Facebook: www.facebook.com/ourorganization

Social Media

The URL can be pointing to a social media address other than a website (for example, www.twitter.com/ourorganization). A location or service/program URL should only be included if it is unique to either that particular location or service/program.

Preferred style examples
- Twitter: www.twitter.com/ourorganization
- Facebook: www.facebook.com/ourorganization

Tax Status

The **tax status** of an organization describes the type of organization or conditions under which the organization is operating. For example, 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
- Private corporation
- Government
- Other

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

Website Rating

The Website Rating is a field that supports data verification efforts. The quality of information available on an organization's website can be rated on a 1-5 scale. This is purely for verification purposes and is not meant to criticize an agency's appearance or clout. This is somewhat subjective so use your best judgment and make sure to remain consistent in your ratings!

5 - Excellent: Information is exceptional & recent, leaving minimal to no call verification work needed
4 - Good: Information is well outlined with some gaps that require call verification work
3 - Fair: Information is present but has significant gaps that require substantial call verification work
2 - Poor: Information is incredibly scant and requires almost all verification to occur over the phone
1 - Absent: No website is present

Tax ID

A **Tax ID** number, also known as Employer Identification Number (EIN), 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. Tax ID numbers are used by employers, sole proprietors, corporations, partnerships, nonprofit organizations, government organizations, certain individuals and other business entities. **Preferred style example**: 87-8573645.

Year Incorporated

The **Year Incorporated** field is the year the organization was incorporated or founded. This field is a string - dates should be rendered as four-digit full year (e.g., 1999, 2017).

Legal Status

The legal status defines the conditions that an organization is operating under. This field is structured as a dropdown, with the options being non-profit, private corporation, government organization and other.

Code

The **Code** field is for internal use - please disregard this field.

Contacts

Contact Name

~~**Contact Name** is a string field that should contain the contact's first and last name in Title Case (e.g., Jane Doe). The name preferably includes both the first and last names and should be entered in full. The preference is to omit any gendered or honorary titles unless the organization specifically requests it. However, if a preferred pronoun is provided, it should be included. A medical doctor is an exception in which case 'Dr' is all that is needed. Generally, omit credentials that come after a name (for example, MSW or PhD) unless insisted upon by the organization.~~

~~If an organization provides a formal expression of the main contact's name (for example, Mrs N M Wilkinson), then that should be respected.~~

~~**Preferred style examples**~~
- ~~Dr Jenny A Jenkins~~

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

- ~~Jim Jameson~~
- ~~Father John Seymour~~
- ~~S. W. Rodriguez~~
- ~~Hanif Mohammed~~
- ~~Anne Hughes-Simmons~~
- ~~Victoria Allinson (they/their)~~
- ~~Alex Henderson (she/her)~~
- ~~A. Thatcher (he/him)~~

Contact Service

If the contact is associated with a specific service (e.g., project coordinator) select the corresponding service from the **Contact Service** dropdown list. Not all contacts will be associated with a specific service. Some contacts will be associated with more than one service, in which case you should select all services that apply.

Contact Title

The contact title reflects the formal job position of the person. Generally, titles are written in full (for example, Executive Director instead of ED). Occasionally, you may encounter an organization that describes itself as a Collective. In this case, it is best to simply ask for one name to serve as the "Office Contact".

Preferred style examples
- President and Chief Executive Officer
- Chief Medical Officer
- Administrator
- Office Coordinator
- Director
- Director of Operations
- Coordinator

Contact Department

If the person is a member of a specific department, type it in in the **Contact Department** free text field. Examples of Contact Departments could include Mental & Behavioral Health, Community Engagement, Legal Department, etc.

Contact Email

Contact Email refers to a specific contact's personal email address. This should refer to the individual person's email address, and not the main email address of the organization or service. The email address must be entered in the standard format of a valid email address (i.e. x@x.yyy).

Preferred style examples
- info@airs.org
- ymca@isp.net
- airs@info.org
- ourtowninfo@gmail.com

Contact Visibility

Contact Visibility is a functional field that determines whether a Contact's information will be displayed publicly. Sometimes, it is beneficial to store certain contacts' information in the system for verification purposes, but it would not be appropriate to list their number publicly. In this case, select "Private" so the Contact's information will be hidden from the public-facing site. If the Contact's information is listed in relation to a certain service and/or sharing the information is beneficial to users, the Contact should be listed as "Public."

Locations

Locations are the physical locations (sometimes called branches) at which clients access services provided by an organization. An organization must have at least one location but can have several (although web-based services may have no physical location).

Location records contain identifying information about the specific location (such as address, telephone number, manager, hours, and any other detail that appears helpful about the specific location).

Some location elements (such as Phone Number) should be styled in the same manner as their counterpart element within the "Organization" record. However, the content must be specific to that location (for example, any URL should be specific to that location and not the main organization URL that was already entered at the Organization level).

Location Name

This is the name of the location. If an organization has only a single location, then, the organization name is usually the location name. For example, if Abacus Child Care Center is the organization name and there is only one location, then that location name is Abacus Child Care Center. However, if Abacus operates from a second location, the organization might have an existing name that it applies to the location such as Abacus2 Child Care Center or Jane's Place. If not, the Data Steward might have to devise a way to identify the location name such as Abacus Child Care Center (Middletown Branch).

In some instances, the location name may have a distinct alternative title that has no obvious relationship with the main organization. For example, the CM Mathewson Mental Health Clinic may be a location of the regional public health authority.

In other cases, the location name may be drawn from the function that it provides for the organization. For example, if the local Salvation Army operates a thrift store at a unique location, the location name might be "created" as Salvation Army Thrift Store. If it operates a couple of thrift stores, maybe the location names become Salvation Army Main Street Thrift Store and Salvation Army Broad Street Thrift Store. The main thing is to be consistent in the naming style used when creating a location name.

Note that the location name is not necessarily the same as a 'building name' which is really part of a standard address format.

Preferred style examples
- Grey County Social Services Department – Youth Club

- Lakeside Library (Riverfront Branch)
- Mountainside Neighborhood Association – Satellite Office
- Ocean Hospital Outpatient Clinic
- Salvation Army Homeless Shelter
- YMCA – Mary Street Child Care Service

Location Alternate Name

An alternate name is another name by which a location or program may be commonly known. A location name may have an alternate name which is an acronym, former name, popular name, legal name, doing-business-as name, or some other alternative. **Location Alternate Name** is a free text field.

Location Transportation

Location Transportation is a description of the access to public or private transportation to and from the location. Location transportation is a free text field that can include information about public transit, such as Metro and Bus accessibility.

Preferred style examples
- Nearest Metro station is Farragut North (Red) - 8 min walk from location
- Nearest bus stop at 34th and K. Bus lines include 57, 345, and N 68.

Location Service

Location Services describes the services provided at the location. This field is a lookup for the services provided by the organization, allowing the data steward to select multiple services that are offered at the location. Please select all relevant services.

Location Description

The location description is a brief statement of no more than 1-2 sentences that describes the primary activities that take place at the location. If the organization has a single location, then this is covered by the organization description and need not be duplicated. If the organization operates from more than one location, then a brief location description is recommended for each one. In some instances, when the same services are available at each location, the location descriptions might all be identical.

Preferred style examples
- Mental health drop-in
- Training center
- Commercial childcare center
- Emergency shelter for homeless men
- Federal government financial assistance program for income eligible older adults
- Food pantry and meal program
- Thrift store

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

Address, City, State, Zip Code

Address

The **address** describes the physical address of the location(s) from which the organization operates. The components of a street address should follow the standard US Postal Service format for addresses. In the DC CRI, all addresses are entered as Locations/Locations associated with the Organization or Program/Service.

Some organizations may withhold their physical address for confidentiality reasons (for example, shelters for domestic violence/abuse survivors). In these cases, if the address is provided, enter "Address Confidential"

Note that there may be organizations that have no actual or relevant physical address. In these cases, leave the address information blank but make sure there is a clear indication that an organization is 'Online only' in its description field.

Preferred style examples
- 100 Main Street, Suite 400
- City Hall, 100 Main Street West, 7th Floor
- 14 Fir Crescent
- 587 4th Street
- 85 Acorn Boulevard
- 9206 Willow Street NW, Unit 470
- 9206 South Willow Street West, 4th Floor
- Hawthorn Heights Building, 500 Orange Blossom Street, Unit 4
- Online only

Guiding information
- Although there are standard abbreviations (for example, Ave) that will be read by geo-mapping programs and are officially approved by the postal service, if the software field permits the number of characters, use the full spelling (for example, Avenue) to remove any possibility of ambiguity.
- Some addresses will be provided by organizations in the style of "234-111 Cedar Street." Although this is officially recognized, it is not intuitive for users so enter the address as "111 Cedar Street, Suite 234" to be clear. If you are unsure whether it is a "suite", use the more flexible word "unit."
- Do not 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), enter that in full. The exception is for cities that have addresses that reflect a larger grid. In these cases, an abbreviation can be used if it is the established format (such as 453 Wood Road NW or 67 SE Stone Place). There may also be some other exceptions based on accepted local terms such as 678 MLK Boulevard.

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

City

This is the part of the physical address that describes the major city or town in which the location operates. The name of the city follows the street address and precedes the state/province and ZIP/postal code in conventional postal service format.

Again, standard and full spellings should be used. The key is consistency. All organizations in a certain defined community should have the same city address.

Preferred style examples
- Davistown
- Gillespieville
- Saint Paul
- Parkerton

State/Province

The designation of the state/province must be part of the location address of the organization. Use only the official two-letter code for all states, provinces and territories. Do not use a period to denote the abbreviation (for example, use AK rather than AK.) and always use upper case (for example, AK rather than Ak).

Preferred style examples
- AZ
- DE
- MA
- PR

ZIP Code

The ZIP code and the postal code must be part of the location address. This element must use the fixed official structures used by the respective national postal services of the United States and Canada. The 'extended' US ZIP code contains five numeric digits along with a hyphen followed by four additional digits. However, the first five are the only ones required, and denote a wider area in which individuals place themselves (for example, "I live within the 40812 ZIP code") and which are used for searching. Do not enter the additional four digits. A Canadian postal code consists of six characters – alternating upper-case alphabetical and numerical elements (ANA NAN) with a single space between the pairs of three characters.

Preferred style examples
- 40125
- 68516
- 21742

Regions

Regions is a field that can be used to further specify the location. Regions is a dropdown menu that allows the user to select multiple options. In the DC CRI, Regions is primarily used to specify Wards 1-8.

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

ADA Compliant

ADA Compliant is a field that indicates whether the location is compliant with the Americans with Disabilities Act (ADA). This is a dropdown field with the following options: Blank, ADA Compliant, Not ADA Compliant. If you are unsure of whether the location is ADA compliant, you may select "Blank."

Accessibility Details

This describes the factors that either help or hinder access to the location/location for persons with physical disabilities. There is a checkbox to indicate ADA compliance, as well as a free text field to explain further. In instances where accessibility is not clear, the following standard phrase should be included. "Visitors with concerns about the level of access for specific physical conditions, are always recommended to contact the organization directly to obtain the best possible information about physical access."

Remember that access for persons with physical disabilities covers more issues than wheelchair access. If the service is only offered online, web-accessibility information should be added when possible. Ask the organization if the website includes any text, audio, or video alternatives, or if it has been designed to be keyboard accessible. More information about the guidelines can be found on the Web Content Accessibility Guidelines (WCAG) Overview.

Preferred style examples
- Wheelchair access to main entrance via ramps
- Accessible washrooms
- No wheelchair access
- Accessible apartments including wheel-in shower
- Lowered elevator buttons
- Wheelchair-level button opens main doors
- Designated parking spaces
- Wheelchair access possible with appointment
- Braille elevators and signage
- Tone elevators
- Visual alert systems
- Wheelchair access – but call for details

Schedule

Regular Schedule

This refers to the days and times an individual can access either the administrative hours of a facility or the hours of a particular service/program.

In the DC CRI, this information is organized in a structured way as per the following table which can allow for filtered searches (e.g. Food Pantries and Friday). For **Opens** and **Closes**, the field is structured as a dropdown with 30-minute increments. You can type in more specific times if needed. There is also a check box to indicate "Closed All Day." Similarly, holiday schedules are captured in a structured table.

Weekday	Opens:	Closes:	Closed All Day
Monday	From:	To:	[ ]

Tuesday	From:	To:	[ ]
Wednesday	From:	To:	[ ]
Thursday	From:	To:	[ ]
Friday	From:	To:	[ ]
Saturday	From:	To:	[ ]
Sunday	From:	To:	[ ]

Finally, an unstructured field for a string of text is available to collect the information that can't easily be captured in the structured field, such as "Closed for Lunch." In some cases, a service may only be available on a seasonal basis in which case that information may also be entered in this area.

Holiday Schedule

The **Holiday Schedule** refers to alternate schedules. For each Holiday Schedule, you'll need to select the date that the alternate schedule begins and ends (e.g., 12/24 - 1/2) and enter in the new hours of operation. There is also a check box to indicate "Closed All Day." These fields are structured in the following way:

Start	End	Opens:	Closes:	Closed All Day
Date	Date	From:	To:	[ ]

Users can add as many holiday schedules as needed by selecting the '+' button at the top right corner of the table.

Phone

Phone Number

This details the **Phone Numbers** (and now, text) used to reach a particular organization, location or service/program. In addition to the actual number including possible extensions, there may be contextual information that describes the type and/or function of the phone (e.g., toll-free, administration, intake, etc.).

In the DC CRI, there are separate fields for phone number, extension, and phone type, as well as phone language and phone description.

An organization might have several phone numbers for different purposes (e.g. after-hours, Spanish only, alternative number). Note that phone numbers for locations and/or services are only included if they are different from the main organization phone numbers.

Preferred style examples
- (250) 467-9836
- 1-800-976-9760
- 1-800-435-7669 (1-800-HELP-NOW)
- 2-1-1
- 9-1-1

Guiding information

- The construction (250) 675-8615 is clearer for users than 250-675-8615.
- Even if all of the phone numbers in a database share the same area code, you still need to include it in each instance for the use of those contacting an organization from another region.
- Use hyphens for 9-1-1 and 3-1-1 to ensure the digits stand out clearly.
- Toll-free numbers should include the "1" to make sure that is clear. The words "Toll-free" should also be added in another area. Try to establish where the toll-free service is available.
- If there is a "named" number, such as 1-800-HELP Now, list the actual number of the service (for example, 1-800-435-7669) but try to transfer the 1-800-HELP-NOW reference into another data area.

Phone Extension

This **Phone Extension** field is an option for listing an extension, if relevant. An extension should only be used if it is helpful (particularly where there is an automated switchboard, and the extension saves a great deal of menu choices) and/or is recommended by the organization itself. In most cases, calls to organizations go to a main switchboard and are then diverted to the person.

Phone Type

Use the **Phone Type** field to indicate whether the number is for voice, fax, intake, hotline, etc. A fax is usually entered as a separate data field and identified as a 'fax number,' although the relevance of a fax number is diminishing. The logical assumption is that a call is going into a "normal" voice telephone unless indicated otherwise. This dropdown field provides some contextual information about the type and/or purposes of a phone number, including whether it is a voice, text, TTY or fax number. This field can also be used to indicate that a number is an intake line for the Organization's service(s).

Preferred style examples
- Fax
- TTY
- Text
- Intake Line
- Spanish Line
- Hotline
- Voice

Phone Language

The **Phone Language** field is a dropdown field that indicates which languages are available for callers. If there are multiple language options for the phone lines, they should be indicated here. Users can select more than one language. The options included in the DC CRI are English, French, Amharic, Chinese, Korean, and Vietnamese.

Phone Description

The **Phone Description** field is a free text field that allows users to add more information about the phone line. For example, users can indicate that this phone line is for a particular program, service, or office. Information that can be captured is the structured fields provided should be entered there.

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

Main (check box)

The **Main** check box should be selected to indicate that the phone number is the main number for the Organization. Selecting this box will ensure that the "Main" number shows up first on the Organization's page so that users can find the best number easily and increase their chances of accessing services easily.

Services

A service record describes the types of assistance an organization delivers to its clients. Technically, "services" are specific activities that can be classified using Taxonomy terms. Specific types of services should be essentially the same no matter what organization is providing them.

Sometimes organizations will provide a group of services (some primary and some secondary) and organize them as a "program." Programs may be considered as groups of services under a specific title (which could be a well-established name such as the WIC Program or a name locally created by the organization itself). For example, a job training program may be made up of a number of services such as vocational assessment, a resume preparation class and job placement assistance.

While services are essentially the same across organizations, the definitions of programs may differ significantly. (Just to make it more confusing, sometimes a program name will contain the word "Service" and sometimes an organization will promote a service under the name "Program."). Service records generally include a description that offers a summary of what is provided, in addition to other key data elements such as eligibility and application procedures.

Service Name

If there is no formal service name, one may need to be formulated by a resource specialist based on the clearest expression of the activities provided. This same service name would then need to be applied consistently to all activities delivering essentially the same thing. Generally, the service name should relate closely to the relevant Taxonomy indexing term. And yes, the 'service' name might sometimes include the word 'program'.

Preferred style examples of services
- Utility Assistance
- Food Pantry
- Adult Literacy Service
- Afterschool Program
- Parenting Class
- Vocational Training
- Bereavement Counseling

Service Alternate Name

The free text **Service Alternate Name** field should be used to capture any other names used to describe the service so that users can easily find the one that they're looking for.

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

Organization Name

The dropdown field **Organization Name** allows the user to select the parent organization that offers the service from the list of existing organizations in the DC CRI.

Service Description

A service description provides an opportunity to more fully describe the nature of a service in order to help someone make an informed decision on a referral.
In many ways, it is the most important field and the one that requires the most skill in terms of deciding the content and then delivering that content with concision and clarity.

The service description is the place to provide contextual information (for example, on secondary and ancillary services). It is also a place where other data elements (such as appropriate licensing information or affiliations can be added if there are no specific fields for those elements and their inclusion would be helpful. Where relevant it can also be the place to provide additional information.

The description should be written in specific enough terms to enable community resource specialists and the general public to determine whether this resource is an appropriate referral.

The description must reference and describe all of the services that are referenced by taxonomy terms   .

Preferred style examples

- Mutual support group for alcoholics. Regular meetings at a variety of times and locations throughout Rockland County.
- Licensed child care center for toddlers and preschool children.
- Works with Green State Department of Labor to secure placements, part-time and full-time employment for Grey County Community College students and alumni.
- Support for day laborers within the Spanish-speaking communities providing a safe place for workers to wait to be picked up for daily jobs. Light breakfast available and referrals to ESL programs.
- Classes, workshops and conference offered multiple times throughout year for unpaid caregivers who are looking after an adult family member or friend. Classes and events include Powerful Tools for Caregivers, Caring for Your Loved One at Home, Yoga for Caregivers and annual caregiver workshops. Respite may be available with early registration. Website includes calendar of upcoming events.
- Local branch of national organization. One-to-one meetings to assist patients and families with free advice to help solve problems related to finances, insurance, employment and costs resulting from a cancer diagnosis.
- Online support service for caregivers, includes live chat support.
- Health care services provided in-home for illness or injury. Includes wound care for pressure sores or surgical wounds, patient and caregiver education, intravenous or nutrition therapy, injections monitoring serious illness and unstable health status.
- Alternative to court system for resolving civil and minor criminal disputes such as tenant/landlord problems, neighborhood disputes, small claims and family conflicts. (Note that this is not appropriate for disputes associated with domestic violence.)

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

- Supports young volunteers in programs geared towards environmental quality and awareness. Individuals can commit 675 hours of service year-round or 300 hours over the summer. Living stipend is provided and a monetary educational reward is given upon completion of service hours.
- Promotes healthy lifestyles, good nutrition and home budgeting to food stamp recipients/applicants. Classes and home visits from dieticians and home economists.

Guiding information
- Construct the narrative with the most important information coming first and the least crucial piece of information listed last.
- As a general rule, adjectives and adverbs can be eliminated.
- When creating a list, use commas rather than semi-colons. If a list exceeds four items, a simple bullet format can be used, (and the format chosen should be consistent across the database).
- Write in third person.
- Use active verbs and clear language.
- Do not accept the narrative directly from the organization.
- Service descriptions should be precise but also 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.
- Avoid using full sentences such as "This program provides peer counseling within a supportive environment …" if "Peer counseling available" gets to the point quicker and is easier for the community resource specialists to read.
- Avoid overelaborate phrases (usually supplied by the organizations themselves in their completed surveys) such as "Provides a family-focused model based on empowerment and individualized expression ..." Ask yourself, "What are they actually doing and what would a potential client – someone looking for solutions to their specific concerns and experiences – really want to know?"
- Avoid abbreviations such as e.g. or i.e. if possible. Use "for example" and "that is" or "that means."
- Avoid subjective language (such as "highly qualified staff) and social service jargon.
- Prefixes and hyphens: The common-sense rule is only to use a hyphen if the word looks strange without it. Generally, if the prefix ends with a vowel and the word that follows it begins with a vowel, then a hyphen may be needed (for example, pre-empt rather than preempt). Some words, however, are well established enough to not require a hyphen (for example, coordinate and cooperate).
- Within your own database, try and standardize your descriptions for identical services as much as possible. For example, all services describing utility payment assistance programs should be written in a similar fashion.
- Omit minor details that would be hard to consistently update and that can be left to the client to discover when contacting the organization.

Service URL

The **Service URL** field should be used to capture a website or webpage that provides information on a specific service. Sometimes, organizations will have a page for each service they offer, and linking these pages directly to their relevant services can help users find more information about services quickly.

Preferred style examples
- www.airs.org
- www.arbitrary.com
- http://airs.org
- www.air.org/application.doc

Service Email
Service Email refers to an email for a specific service. The email address must be entered in the standard format of a valid email address (i.e., x@x.yyy).

Preferred style examples
- info@airs.org
- ymca@isp.net
- airs@info.org
- ourtowninfo@gmail.com

Eligibility Requirement
The **Eligibility Requirement** field is a Yes/None dropdown that allows you to indicate if there are requirements to access the service. This structured field allows users who query the database to search for services that are open to them without certain eligibility requirements. If there are requirements to ccess the services (e.g., referral required), select "Yes." If you select "Yes," be sure to define the requirements in the **Application Process** free text field.

Application Process
The **Application Process** free text field that provides clients with information on the "next steps" to take to access a particular service. In many cases, the directions are fairly obvious such as "Call or walk in for service," but many organizations have very specific requirements (for example, walk-ins will not be accepted, individuals must call first … or there must be a professional referral). In many cases, the field can simply read "Call for more information."

Preferred style examples
- Appointment required
- Call to apply
- Walk in for service
- Physician referral required
- Call or walk in for service
- Referral required
- Online only
- Intake conducted Mon-Fri 9am-2pm; Phone Mon 9am-5pm for an appointment.

Fee Options
The **Fee Options** field is a dropdown that indicates what type of fee should be expected to access the service, if any.

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

Most services within the DC CRI are 'free,' although 'no fee' is a better way to describe that fact as there is always a 'cost' to provide a service. Clients need to know if there is a fee and, if so, approximately how much it is and/or how it is calculated.

Fee Details

The **Fee Details** free text field captures the cost of receiving a service. It can also include information about how a particular service can be paid for (e.g., if it might be covered by certain benefit programs).

Typical phrases include "sliding scale" and "no charge" or "fixed fee." Specific dollar amounts are generally omitted. It is helpful to provide clients with some idea of fees when they are applicable but it is difficult to effectively maintain that information.

Preferred style examples
- No fees
- Medicaid
- Medicare or other third-party payment accepted
- Call for details
- Sliding scale. Call for details
- Suggested donations
- Nominal cost
- Membership fee
- Fees vary by program. Call for details
- Medicare, private insurance and private payment accepted
- Sliding scale if no insurance
- Sliding scale if no insurance but no one refused service
- Private insurance and/or private payment only
- Private payment only

Service Area

The dropdown **Service Area** field refers to the physical boundaries in which a service is available and by definition, not available to clients 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" is represented by the eight wards. You may select multiple wards. If the service is available to all wards, select the "All Wards" option.

Licenses or Accreditations

There are separate free text fields for **Licenses** and **Accreditations**. If an organization operates either with or because of a license or accreditation secured through an external entity, then this should be recognized within the Data Steward database record. For example, a child care center of a certain size could only legally conduct business if it has a license, or a nursing home would require specific accreditation to operate.

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

When possible, it is helpful to provide the full name of the licensing body to provide users with the opportunity to confirm credentials. This can also be helpful when reviewing an organization for inclusion if only certain types of organizations are included if they are licensed, such as assisted living facilities or child care centers.

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 helpful information to help-seekers, particularly in service areas where perhaps some organizations are licensed but others are not (for example, with home help).

Preferred style examples
- Home care provider licensed by Green State Human Services License Directorate
- Community health clinic accredited by Red State Hospitals Board

Wait Time
The free text **Wait Time** field is used to capture how long a client may expect to wait for services. You can use this field to describe whether there is a wait, whether walk-ins are accepted, and any other pertinent information. (e.g., not accepting new patients, walk-ins accepted).

Program Name
This refers to the specific name of a program. A program name is the approved name that an organization specifies in reference to a set of services, rather than a name created by the Data Steward service. And yes, the 'program' name might sometimes include the word 'service.'.

Preferred style examples of programs
- Employability
- Family Literacy Program
- Head Start
- Mental Health Assessment Services
- Substance Abuse Prevention Program
- Utility Assistance Program
- Vocational Training Services

Program Description
The free text **Program Description** field should be used to describe the Program. This should be rendered as a short phrase that gives more information about the purpose of the program.

Preferred style examples
- Connecting job seekers to employment opportunities
- Wraparound educational services for low-income families
- Comprehensive substance abuse support and prevention

Category Type & Term
The Service Category section is important because it helps people find the right type of service for their needs. We ask that you select categories only for primary services, i.e.,, services that an individual can

access at the point of entry without being required to enroll in other services. For Case Management, one might select "Care," which includes the sub-category "Navigating the System." Additional services available to those already enrolled in case management, such as financial counseling, are secondary services and should not be categorized, but <u>should</u> be described in the Description field, as noted above in the Definition of a Service section.

<u>Please add all relevant categories describing primary services.</u> The **Type** field is the general category. After selecting a **Type** you can select more specific terms from the **Term** field.

The Category Types are:
- Care
- Education
- Emergency
- Food
- Goods
- Health
- Housing
- Legal
- Money
- Transit
- Work

For a full list of Category Types and Top-level Terms, scroll down to the <u>Service Category Table</u>.

Subcategories within the **Term** field are indicated using the number of hyphens as shown in the picture below. Please select the term that best describes the service.

Eligibility Type & Term
The Service Eligibility section outlines important information about who is able to access this service. **Please add all eligibility requirements.** Any information about the application process (e.g., referral required, call to apply) should be captured above in the **Application Process** field until "Additional Info"). If a referral is required, please select "Yes" in the Eligibility **Requirement** field.

The **Type** field is the general category. After selecting a **Type** you can select more specific terms from the **Term** field.
- General
- Age Group
- Armed Forces
- Citizenship
- Criminal History
- Disability
- Education Status
- Emotional State
- Employment Status
- Gender

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

- Geography
- Guardianship
- Health Conditions
- Household
- Housing Status
- Income
- Insurance
- Language
- Race/Ethnicity
- Role
- Sexuality
- Survivors
- Urgency

For a full list of Eligibility Types and Terms, scroll down to the Service Eligibility Table.

Detail Type & Term

The **Detail Type** and **Term** dropdown categories can be used to describe various aspects of services. The **Detail Types** include categories pertaining to *Insurance, Required Documents, Transportation, Cultural Competencies,* and *Translation.* The benefit of capturing details in these structured fields is that the data can be filtered by these dimensions when a user searches.

Insurance

The **Insurance** dropdown describes whether and which types of insurance are accepted. If multiple types of insurance are accepted, click the '+' button on the top right to add another **Insurance** entry. The types of insurances included in the DC CRI are Medicaid, Medicare, Private, and Under/Uninsured.

Required Document

Required Document refers to documents that clients will need to provide the organization to access services when following up with the referrals.

There is a dropdown box to make data entry easier, eliminate typos and ensure consistency. Multiple required documents can be added in. If multiple documents are required, click the '+' button on the top right to add another **Required Document** entry.

Preferred style examples
- Proof of income
- Utility bill or notice
- Proof of spouse/dependents
- Application
- Proof of address
- High school diploma
- Photo ID
- Proof of hardship
- Prescription

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

- Proof of financial crisis

Transportation
The **Transportation** dropdown includes three options that describe transportation accessibility in general terms. The options included are Bus Accessible, Metro Accessible, and Can Provide Transportation. These service-specific details should be filled out in addition to the location-specific transportation and accessibility information that is captured at the **Location** level.

Cultural Competencies
Cultural Competencies describes cultural populations to which this service caters. The options included are Muslims, Orthodox Jews, and Women of Color. If the service caters to multiple populations, click the '+' button on the top right to add another **Cultural Competencies** entry.

Translation Available
The **Translation Available** field describes specific languages (other than English) that are consistently available in a particular service. In the "Details" section you can enter in information about Translation services available.

In order to facilitate searching by language availability, some Data Steward services structure language information in a format that supports the ability to filter data. Users are then able to search for a particular type of service in Spanish and the system will filter in those that match the criterion.

Agencies often tend to exaggerate language availability. Try to only list languages that are consistently available. There is a difference between a program that provides Spanish services as part of its mandate and one that has a part-time volunteer who speaks Vietnamese.

If a number of languages are available, include English (if it is one of those languages) and list it first, with the other languages listed in alphabetical order. The options included in the DC CRI are English, French, Amharic, Chinese, Korean, and Vietnamese.

Service Category Table (Type & Top-level Terms)

Food		Care	
	Community Gardens		Adoption & Foster Care
	Emergency Food		Animal Welfare
	Food Delivery		Community Support Services
	Food Pantry		Daytime Care
	Meals		End-of-Life Care
	Help Pay for Food		Navigating the System
	Nutrition Education		Residential Care

Category	Item	Category	Item
Housing	Temporary Shelter	Education	Support Network
	Help Find Housing		Help Find School
	Help Pay for Housing		Help Pay for School
	Maintenance & Repairs		More Education
	Housing Advice		Preschool
	Residential Housing		Screening & Exams
Goods	Baby Supplies		Skills & Training
	Clothing	Work	Help Find Work
	Home Goods		Help Pay for Work Expenses
	Medical Supplies		Skills & Training
	Toys & Gifts		Supported Employment
Health	Addiction & Recovery		Workplace Rights
	Dental Care	Legal	Advocacy & Legal Aid
	End-of-Life Care		Mediation
	Health Education		Notary
	Help Pay for Healthcare		Representation
	Medical Care		Translation & Interpretation
	Mental Health Care	Emergency	Disaster Response
	Sexual & Reproductive Health		Emergency Food
	Vision Care		Temporary Shelter
Money	Financial Assistance		Help Find Missing Persons
	Government Benefits		Immediate Safety

	Financial Education		Safety Education
	Insurance		Emergency Payments
	Loans	Transit	Help Pay for Transit
	Tax Preparation		Transportation

Service Eligibility Table (Type & Top-level Terms)

General	Anyone in Need	Guardianship	Foster Youth
Age Group	All Ages		Runaways
	Infants and Toddlers (0-2)		Unaccompanied Minors
	Young Children (3-5)	Health Conditions	Alzheimer's
	Youth (6-12)		Cancer
	Teens (13-19)		Chronic Illness
	Young Adults (20-30)		Hospitalized
	Adults (31-54)		Infectious Disease
	Seniors (55+)		Living with HIV or AIDS
	Ages 18+		Mental Illness
	Ages 21+		Multiple Chronic Conditions
	Ages 50+		Neuromuscular Disease
	Ages 55+		Pregnant
	Ages 60+		Seizure Disorder
Armed Forces	Active Duty		Severe Mental Illness (SMI)
	National Guard		Substance Dependency
	Veterans		Terminal Illness

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

Citizenship		Household	
	Immigrants		Couples
	Refugees		Families
	U.S. Citizen or Permanent Resident		Individuals
	Undocumented	Housing Status	Home Renters
Disability	Developmental Disability		Homeless
	Hearing Impairment		Homeowners
	Homebound		Near Homeless
	Intellectual Disability		Young Adults Leaving Foster Care
	Learning Disability	Income	125% Federal Poverty Line
	Limited Mobility		150% Federal Poverty Line
	Living with a disability		200% Federal Poverty Line
	Living with Developmental Disability		Income at or below 30% Median Family Income
	Mentally Incapacitated		Income at or below 60% of Area Median Income (AMI)
	On the Autism Spectrum		Income at or below 80% of Area Median Income (AMI)
	Physical Disability		Income-based
	Visual Impairment		Low-income
Education Status	Elementary School Students		Public Benefit Recipient
	Enrolled in College	Insurance	Medicaid Recipient
	Enrolled in Vocational School		Medicare Recipient
	High School Students		Not eligible for Medicaid
	No High School Diploma		Privately Insured

Subcommittee: HIE Community Resource Inventory

Chairs: Ms. Lucy DeOliveira and Mr. Khalil Hassam

Date: October 19, 2023

Status: Final

Emotional State	Grieving		Uninsured
Employment Status	Employed	Language	English as Second Language
	Unemployed		Limited English
Gender	Female	Race/ Ethnicity	African American
	Male		Asian Pacific American
	Transgender/Gender Non-conforming		Latinx
	Transgender Women	Role	Caregivers
Geography	DC Resident		Dependents
	Maryland Resident		Fathers
	Virginia Resident		Mothers
	Ward 5 Resident		Mothers with Young Children
	Ward 6 Resident		Parents
	Ward 7 Resident		Spouses
	Ward 8 Resident	Survivors	Abuse or Neglect Survivors
	Montgomery County Resident		Burn Survivors
	Northern Virginia Resident		Holocaust Survivors
	Resident of 20001 Zip Code		Natural Disaster Survivors
	Resident of 20002 Zip Code		Sexual Assault Survivors
	Resident of 20005 Zip Code		Survivors of Human Trafficking
	Resident of 20009 Zip Code		Survivors of Intimate Partner Violence
	Resident of 20010 Zip Code	Urgency	In Crisis
	Resident of 20011 Zip Code		In Danger

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Status: Final

	Resident of 20017 Zip Code	Criminal History	Formerly Incarcerated
Sexuality	LGBTQ		Perpetrator of Intimate Partner Violence