

# DuPage County Resource Database Development Policy

Last Revised June 26, 2023

DuPage County Community Services  
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*The mission is to provide a trustworthy and comprehensive basic needs resource database to DuPage County residents and agencies using current best practices to meet the individual and organizational 'resource database' needs in the community.*

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## **SECTION 1 – INTRODUCTION**

The purpose of this policy is to provide clear and concise guidance to the persons trained to update resources to support the mission of the DuPage County resource database. The mission is to provide a trustworthy and comprehensive basic needs resource database to DuPage County residents and agencies using current best practices to meet the individual and organizational ‘resource database’ needs in the community. The resource database increases community capacity by eliminating duplicative resource collection, providing a self-guided database to connect those to the resources, and provides data on community needs to inform system planners and policy makers.

The Resource Database Development Policy provides directives on managing resources that will be included or excluded from the database as defined by the Inclusion Plan. In addition, it provides detailed descriptions on how resources will be identified based on service indexing, what data elements will be included, and how such data elements will appear in the database. This policy also provides guidance on the required resource review and update to further ensure that the most valid and applicable information is being delivered to the community.

This policy shall be maintained by the Intake and Referral Unit and reviewed at a minimum of once every 3 years, where changes are to be submitted to the Director of Community Services for approval.

The resource database is hosted in the Northeast IL (NIL) Homeless Management Information System (HMIS) where the Alliance to End Homelessness in Suburban Cook County is the NIL technical lead and DuPage County Community Services is the HMIS Lead for the DuPage County Continuum of Care (CoC). HMIS has its own criteria for managing project and client level data that will not always align with the resource database criteria. HMIS System Administrators and the Resource Specialists will work together to determine best practices where records overlap. At this time, the Alliance is entering limited resource data in the shared environment that is not expected to meet the standards listed in this policy. Call Specialists will be trained to include location filters when looking up resources to help ensure the most appropriate search results.

## SECTION 2 – INCLUSION PLAN

The resource database is designed to be a comprehensive resource database. Any organization or entity meeting the Inclusion criteria may be incorporated. The focus of the database is services offered to persons located in DuPage County where the service meets either an essential human or economic need. Areas targeted include clothing and household goods, education, employment, income and financial resources, individual and family support, legal, food, health (dental, medical, mental), housing and utilities, and transportation. Agencies and services must meet all criteria, as explicitly stated within the Inclusion Plan, to be included in the resource database.

### Geographic Area

Agencies to be included within this database must provide services that meet an essential human or economic need to those located within DuPage County, Illinois, or are providing 211/Information and Referral services in the State of Illinois.

### Agency Types

#### For inclusion:

- Non-profit organizations
- Government entities
  - Federal
  - State
  - County
  - Local Government
- For-profit businesses offering services to the public at:
  - No cost
  - Sliding fee
  - Will accept payment from government or nonprofit entities.
  - Accredited Colleges/Universities that are located within DuPage County
  - Provides services to older adults within DuPage County
  - Or meets a unique human service not otherwise available from a nonprofit provider.

#### For exclusion:

Organizations that

- Do not expressly meet the inclusion criteria.
- Provide services to members only.
- Are sufficiently covered through other resources already included in the database. If the resource is already being maintained and publicly available through another database such as subsidized housing through Housing and Urban Development (HUD), Childcare listings through the YWCA, or Home Health Care providers through Medicare.gov, we will list the alternative resource database.
- Do not have at least one established service site that clients can physically visit should the service require it; excluding web and telephone-based services that otherwise meet the inclusion requirements.
- Do not have at least one staff person that is regularly available to communicate with Information and Referral staff, except for an entity that has reliable and current program information posted publicly.
- Primarily serve for a political cause or are an issue-oriented action group.
- Engage in fraudulent, discriminatory, or illegal activities.
- Misrepresent their services in any way.

## Other Inclusion Considerations

The following items will also be considered when an agency applies for inclusion in the database:

- Degree of demand/need for the services offered.
- Number of agencies in the database currently offering the service.

## Exclusion/Removal Criteria

DuPage County Community Services reserves the right to exclude organizations from the resource database that do not meet the inclusion criteria as explicitly stated within the Inclusion Plan. Potential grounds for exclusion or removal from the database may include, but are not limited to:

- Failure to provide listed services to eligible applicants.
- Fraud
- Misrepresentation
- Discrimination
- Criminal activity
- Agency no longer meets inclusion criteria.
- No response from the agency to three consecutive requests for updated information (at least one will be via phone or physical letter)

## Requests for Inclusion

All requests for inclusion may be initiated by creating/logging into [My Account](#) on 211dupage.gov and selecting 'Add a new resource record'. Otherwise, requests may be emailed to, [211dupage@dupagecounty.gov](mailto:211dupage@dupagecounty.gov). A staff person will review the request along with any additional information needed to determine if the resource meets the Inclusion criteria. It may take up to 30 days for new requests to be assessed. Once all the information is received and verified by a Resource Specialist, it will take approximately 10 business days to curate and publish a resource listing.

## Statement of Responsibility

Organizations appearing in the resource database have entered into a verbal partnership agreement with DuPage County Community Services to provide accurate information about primary services they offer. They will delegate a resource contact to work with staff at DuPage County Community Services to routinely review and provide updated information on their provider record and program records, including descriptions, hours, eligibility, intake, required documents and fees. These organizations agree to review their resource record(s) annually, notifying DuPage County either through the online resource record, 211dupage.gov, or by emailing, [211dupage@dupagecounty.gov](mailto:211dupage@dupagecounty.gov), of any changes needed or to confirm that the data is accurate as it appears. They may affirm this partnership by completing a [Memorandum of Understanding](#) each year and submitting it to [csprograms@dupagecounty.gov](mailto:csprograms@dupagecounty.gov).

Inclusion in the resource database should not be construed to constitute an endorsement of an agency, organization, or its services, nor should exclusion be construed to constitute disapproval. The resource database provides information, not endorsements, recommendations, or ratings of potential service providers.

## Appeal Policy

DuPage County Community Services reserves the right to exclude any organization, program, or service from the database at any time that the organization, program, or service does not meet the criteria as outlined in this plan. Complaints regarding the exclusion, inclusion, description, removal or indexing of an organization or its service(s) may be submitted in writing to the Program Manager. All complaints will be considered in light of the

Resource Development Policy. The party filing the complaint will be notified in writing of the final decision and justification thereof.

Any further objection to the decision must be submitted in writing to the Director of Community Services whose determination will be returned to the complainant in writing. All decisions by the Director of Community Services are absolute.

Complaints regarding the delivery of a service to a client should be submitted to the organization or entity that provided or refused to provide the service. DuPage County Community Services should also be informed of complaints so that they may keep the resource database current with only those agencies whose referrals are helpful to the community. If there is an egregious non-delivery of service, fraud, discrimination, or misrepresentation of services, DuPage County Community Services reserves the right to remove the agency from the database.

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**Director of Community Services**

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Address: 421 N County Farm Rd.,  
Wheaton, IL 60187



## **SECTION 3 – PARITY PROJECT & WEEDING**

### **Parity Project**

To further assess both resource coverage and accuracy, Resource Specialists will continuously conduct parity projects on service topics throughout the year. These projects will be targeted based on identified community needs, insufficient resource coverage, and annual formal reviews. Staff will utilize other resource directories, web searches, social media, and other information as identified to complete these projects.

### **Resource Weeding**

On an annual basis, the Senior Research Coordinator may inactivate records that meet the following criteria:

- Resources that no longer meet the inclusion criteria.
- Resources that are not in use by HMIS and are not operational.
- Duplicate Resources.
- Resources for which there were 10 (ten) or fewer views and have been published in the database for at least 12 months.
- Resources that do not have at least one staff person that is regularly available to communicate with the Resource Specialists, except for an entity that has reliable and current program information posted publicly.

Only the Senior Research Coordinator or Program Manager are authorized to inactivate resources. Inactivation of resources may have significant reporting and financial repercussions. An official update will be recorded in the software with an explanation as to why the record is being inactivated.

## SECTION 4 - RESOURCE REVIEW AND UPDATE

All resources in the database shall be reviewed and updated by a trained Resource Specialist. A trained Resource Specialist is defined as a person who has completed training by the Program Manager or Senior Research Coordinator and who has been given the authorization to create and edit resource records.

**Formal Updates** constitute a complete audit of each data element and service, where this information shall be verified by a Resource Specialist to assure accuracy of the data. In addition, the data entry must be completed according to the provided Style Guide<sup>1</sup>. Each resource record must be formally reviewed on an annual basis.

**Informal Updates** can occur anytime a change is required to reflect updates to incorrect or new data, where the review or update does not meet the criteria for a Formal Update. Once the change is saved, the system will generate the Last Updated Date to reflect the last time this record was reviewed, edited, and saved.

**Reporting and Monitoring** the resource provider Formal Update is completed through the system's reporting tool. Report, 1311-Resource Update Monitor, generates a list of all resource providers sorted by their last Official Update date. This report is to be reviewed and acted upon monthly.

### Requests for Updates

All requests to update the information appearing in the resource database may be initiated by creating/logging into [My Account](#) on 211dupage.gov, open the resource record, and select 'Report updated information'. Otherwise, requests may be emailed to: [211dupage@dupagecounty.gov](mailto:211dupage@dupagecounty.gov). A staff person will review the request along with any additional information needed to determine if the change can be made or if additional information is required. Once all the information is received and verified by a Resource Specialist, it will typically take no more than 2 business days to make the necessary changes.

We ask that when requesting changes to a resource, please review all the information within the record and any associated records for other changes needed. We require an annual review of the full record by each organization to help maintain accuracy and consistency of the information provided.

### Annual Reviews

Each record must be reviewed annually in its entirety to ensure that the information is current and accurate. These reviews are conducted with a designated resource contact at each organization appearing in the resource database. A Resource Specialist will send out an initial request to the resource contact(s) by email with instructions about the review requested.

All requests to update the information appearing in the resource database may be initiated by creating/logging into [My Account](#) on 211dupage.gov, open the resource record, and select 'Report updated information'. Otherwise, requests may be emailed to, [211dupage@dupagecounty.gov](mailto:211dupage@dupagecounty.gov). In addition, the record may be confirmed to be accurate also by logging into [My Account](#) on 211dupage.gov, open the resource record, and selecting 'Verify all current information'.

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<sup>1</sup> Reference Sections 5, 6, and 7

## **SECTION 5 – SERVICE INDEXING**

All resources in the resource database must be properly indexed using the 211 LA County Taxonomy of Human Services. Only trained Resource Specialists should manage service indexing.

### **Taxonomy**

The taxonomy terms used within this database are adopted from the 211 LA County Taxonomy of Human Services and are updated by the software vendor two times per year. Taxonomy terms provide a detailed description of the service or organization and help classify the services being provided. These terms are organized in a hierarchy and may include multiple levels, with each level providing more specific and targeted information. The Program Manager in conjunction with the HMIS System Administrator reserves the ability to inactivate taxonomy terms that are not utilized in the community, but customization of the taxonomy will not be allowed.

Only primary services<sup>2</sup> will be considered and are indexed to the most appropriate taxonomy term based on the term's description compared to that of the service being provided. Same type services are to be indexed to the same taxonomy term across all resource providers to help ensure consistency and allow for accurate search results. Services may be indexed to multiple terms on the same level, but at no time can be indexed to multiple terms on various levels, also known as "double indexing". All services must be indexed to at least a level two taxonomy coder. The Senior Research Coordinator or Program Manager will make final indexing decisions.

### **Target Terms**

Target terms provide additional search criteria allowing a user to further identify resources that are specific to a particular population. Target terms should only be selected if the population served is not the general population and if the target population is not already explained in the detail of the assigned taxonomy term.

### **Modalities**

Modalities can be added to further identify a specific type of setting or delivery of service, as in counseling services. Adding a modality is optional and is only visible to trained users through the Homeless Information System (HMIS).

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<sup>2</sup> Primary Services are described as those services often made available to first time clients/customers, or the primary reason why someone would contact the agency.

## SECTION 6 – DATA ELEMENTS

All data elements of each resource record must be formally reviewed upon creation and on an annual basis. The following data elements are the minimum data requirements to be completed for every resource record. The Senior Research Coordinator will complete a monthly audit of these elements to help ensure compliance.

### Provider Profile

Agency/program name	Email
Also known as (AKA) name for agency/program	Name and Title of the Director or Administrator
AIRS Official Update	Name, Title, Phone and Email for Resource Contact
Official update date	Website
Name and Agency Requesting Change	Hours and Days of operation
Change Description	Languages
Description	Access for People with Disabilities
Physical address	Available for public site
Mailing address	Available for printed directory
Contact numbers	

### Standards Information

AIRS designation of agency/site	License/Accreditations
Legal Status of the agency	Payment Methods Accepted
Provider Maintaining	

### Services

Geography served	Service offered outside of physical location
Primary services	Available for a printed directory
Description	Available for referral
Hours	Available for research
Eligibility	Last verified date
Intake/Application Process	Resource contact information
Required documents	Telephone number(s): Type, Function, Confidential, Toll-Free
Fees	Geography Served
Languages (other than English, noting English when non-English languages are listed)	

## SECTION 7 – STYLE GUIDE

The resource database was created to align with the most recent AIRS Standards and Style Guide. The Style Guide goes through each Required data element and describes the proper grammar, punctuation, capitalization, italics, abbreviations, use of numbers and hyphens and sentence structure to be used in each individual data element. The primary principles of the AIRS Style Guide are clarity, accessibility, ease of training, brevity, naturalness of language, accuracy of information, consistency, and relevance. All Resource Specialist shall be trained on the Style Guide and how to enter the data as prescribed.

### Provider Creation

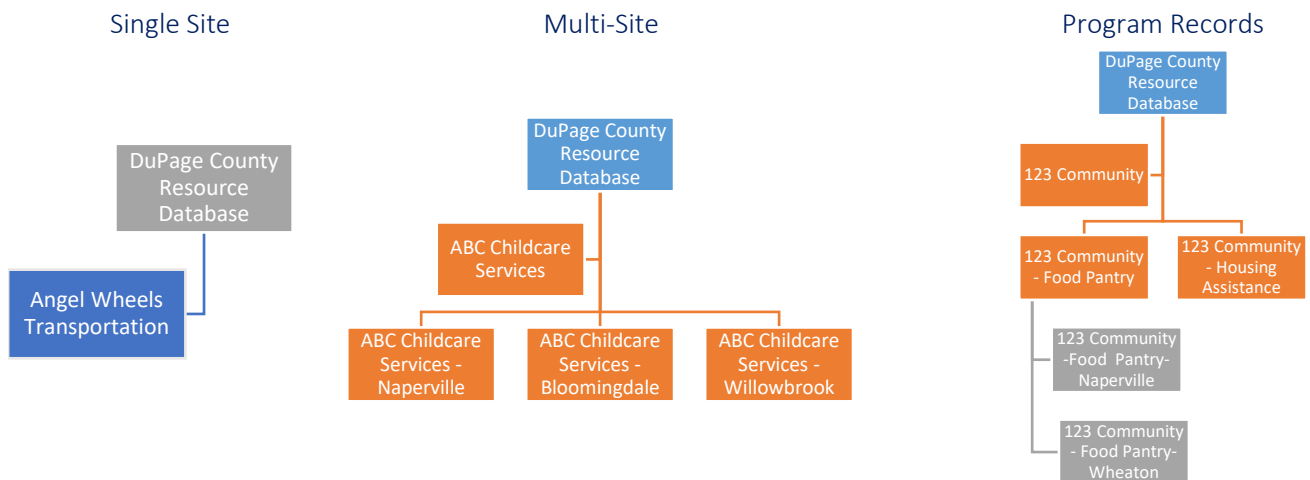
#### Provider Organizational Structure

Data Element	Level	HMIS Field Location and Name
Agency/Organization	Provider Record	Provider Admin → Provider
Site	Provider Record	Provider Admin → Provider
Program	Provider Record	Provider Admin → Provider

#### Description

- If HUD/HMIS or Uses Client Services data element in the Provider record is checked, contact [HMIS@dupagecounty.gov](mailto:HMIS@dupagecounty.gov) before making any changes.

#### Examples



### Agency Name

Data Element	Level	HMIS Field Location and Name
Agency Name	Agency	Provider Profile → Provider Name

### Description

- Official name; doing business as.
- Styled as listed publicly, including acronyms and ampersands.
- Omit punctuation from abbreviations.
- Avoid abbreviations when possible.
- Capitalize each significant word.

### Examples

- Aurora, City of
- Access from AT&T
- ARK, The
- Carepoint Adult, Child & Family Association
- Call 4 Calm - Mental Health Support Text Line

### Site Name

Data Element	Level	HMIS Field Name and Location
Site Name	Site	Provider Profile → Provider Name

### Description

- Site records should be listed as ‘Agency Name–Location’.
- If there is more than one site within the same city, use ‘Agency Name–Street Name, City Name’.
- Styled as listed publicly, including acronyms and ampersands.
- Omit punctuation from abbreviations.
- Avoid abbreviations when possible.
- Capitalize each significant word.
- Governmental programs should all be listed uniformly, with the name beginning with the level of jurisdiction.
- If the resource record is also a HMIS record, HMIS System Administrators may opt to shorten the Site/Program name by using an acronym for the Agency Name.

### Examples

- Acme Healthcare – Carol Stream
- ABC Counseling – High Street, Aurora
- ABC Counseling – First Avenue, Aurora
- Valley Legal Services – Rickert Library, Naperville

## Program Name

Data Element	Level	HMIS Field Name and Location
Program Name	Program/Service	Provider Profile → Provider Name

### Description

- Program records are uncommon in this site for we will use Service Terms to name the primary services being offered, and the service details to provide more information on each service. However, if this is a shared record with HMIS, HMIS must use program records to track data by project type.
- HMIS System Administrators may opt to shorten a program record name by using an acronym for the organization name.
- Program records should be listed as ‘Agency Name–Program Name’.
- If there is more than one site for a program then the name should be listed as ‘Agency Name–Program Name–City Name’.
- Styled as listed publicly, including acronyms and ampersands.
- Omit punctuation from abbreviations.
- Avoid abbreviations when possible.
- Capitalize each significant word.
- Governmental programs should all be listed uniformly, with the name beginning with the level of jurisdiction.

### Examples

- Midwest Shelter for Homeless Veterans - Emergency Services
- DuPage County Community Services - Homeless Prevention Program
- OCM-WYO-Jubilee Village

## AKA (Also Known As) Name(s)

Data Element	Level	HMIS Field Location and Name
AKA (Also Known As) Name(s)	Agency, Site, Program/Service	Provider Profile → Agency/Program (AKA)

### Description

- List names that the agency/site may be commonly known as. This may include alternative spellings, former names, or any alternative which someone may search for this record.
- Eliminate use of punctuation, hyphens, and apostrophes.
- Acronyms are accepted if this is what the agency/site may be known by.
- Use commas to separate multiple AKAs.
- If a resource record is also a HMIS record, HMIS will also use other terms in the AKA for HMIS purposes such as project type or funding source.

### Examples

Agency Name	Also Known As (AKA) Examples
People’s Resource Center	PRC, Peoples Resource Center
DuPage Legal Aid	DuPage Legal Assistance Foundation, DuPage Bar Association

**AIRS Compliant**

Data Element	Level	HMIS Field Location and Name
AIRS Compliant	Agency, Site, Program/Service	Provider Profile → AIRS Compliant

**Description**

- Select to access AIRS specific fields and to designate the record as meeting AIRS Standards.

**Operational**

Data Element	Level	HMIS Field Location and Name
Record Status (Active/Inactive)	Agency, Site, Program/Service	Provider Profile → Operational

**Description**

- Select if agency/program is operational.
- Operational records will appear in the resource database and can be marked to appear on the public website.

**Provider Profile****Update History**

Data Element	Level	HMIS Field Location and Name
Date of Last Annual Verification	Agency, Site, Program/Service	Update History → Official Update and Update Date

**Description**

- Add an Update History record for each formal/official and informal/interim update.
- Update History records will be automatically created for any request submitted through the website that is accepted through the software.
- The Update Date will autofill using the current system date and time in which the Update History record is being created.

Data Element	Level	HMIS Field Location and Name
Mark the update as an Official Update = Yes when initially adding a new record and for each annual review. Data Element		
Date of Last Interim Change	Agency, Site, Program/Service	Update History → Official Update and Update Date

**Description**



- Add an Update History record for each informal/interim update.
- Update History records will be automatically created for any request submitted through the website that is accepted through the software.
- The Update Date will autofill using the current system date and time in which the Update History record is being created.
- Mark the update as Official Update = No for each interim/informal update.

Data Element	Level	HMIS Field Location and Name
Contact for Last Change	Agency, Site, Program/Service	Update History → Person Requesting Change and Organization Requesting Change

### Description

- Add an Update History record for each official and informal/interim update.
- Update History records will be automatically created for any request submitted through the website that is accepted through the software.
- List the First and Last name of the person who confirmed the update or status of the record, using proper capitalization.
- If update/change was requested and/or initiated by the Resource Specialist, method of verification must be noted (verified from website, press release, agency newsletter, etc.) in the Change Description.

Data Element	Level	HMIS Field Location and Name
Resource Database Curator for Last Change	Agency, Site, Program/Service	Update History → Person Making Change and Organization Making Change

### Description

- Add an Update History record for each official and informal update.
- Update History records will be automatically created for any request submitted through the website that is accepted through the software.
- The HMIS user completing the update and the provider the user is entering the data under will autofill in the Update History record.

Data Element	Level	HMIS Field Location and Name
Change Description	Agency, Site, Program/Service	Update History → Change Description

### Description

- Add an Update History record for each formal/official and informal/interim update.
- Summarize the changes made to the record. If this is a new record, this should be noted.
- If update/change was requested and/or initiated by the Resource Specialist, method of verification must be noted (verified from website, press release, agency newsletter, etc.) here.

- If no changes were made during the Formal Update, note this as well.
- Use proper capitalization and punctuation.

### Examples

- Interim update, verified over the phone: library holiday/extreme weather closure note added. Warming Center temporarily disabled.
- Interim update: added executive director to contacts per provider staff autoreply email.
- Interim update, verified by phone: added new service term for rental assistance program.
- Official update: updated hours, phone numbers and eligibility per provider website.
- Official update, verified by Jennifer, CP submission on 6/20/19 @3:05pm - added new primary (P.O. Box) address in Illinois \* new web URL \* updated Hours \* added "Spanish" as a language of service \* 211 staff filled in/updated all required service details.
- Official update, verified from website and official social media pages: updated Intake Process \* removed service term for service/program no longer provided \* updated service details.

### Description

Data Element	Level	HMIS Field Location and Name
Description	Agency, Site, Program/Service	Provider Profile → Description

### Description

- 1-4 sentences/phrases regarding the agency's main purpose.
- Short, concise sentencing using simple language, no technical terms.
- Avoid using subjective language such as best, affordable, healthy, fast, etc.
- No acronyms or abbreviations without spelling it out.
- Avoid duplicating information that is already provided in the given data fields.
- Use proper spelling, capitalization, and punctuation.

### Examples

- Offers medical and behavioral health, dental, community education, immunizations, refugee health services, health education, Women, Infants & Children (WIC), and a pharmacy.
- Provides programs that serve those who are experiencing homelessness. Programs offered include overnight shelter, meals, supportive services, and housing.
- Provides food assistance to residents of Addison Township.
- Provides access to medical and prescription expense services for those with low-income and are medically uninsured in DuPage County.

### Street/Physical Address(es)

Data Element	Level	HMIS Field Location and Name
Address Type	Agency, Site, Program/Service	Location Information → Addresses → Address Type

### Description

- Select Physical for the address type.

- If there is no physical location, such as website listings, then do not enter a physical address.

Data Element	Level	HMIS Field Location and Name
Street Address (Address Line 1)	Agency, Site, Program/Service	Location Information →Addresses →Street Address

### Description

- Enter the building or house number followed by the street name for the physical address. Any suite or room number will be entered in the 'Additional' field.
- If the physical address is confidential, list 'Call for Details'.
- If there is no physical location, such as website listings, then do not enter a physical address.
- Avoid use of abbreviations.
- Eliminate use of periods.
- Proper capitalization and spelling.

### Examples

- 421 North County Farm Road
- 123 Candy Lane
- 987 Forest Circle

Data Element	Level	HMIS Field Location and Name
Address Line 2	Agency, Site, Program/Service	Location Information →Addresses →Additional

### Description

- Enter a suite or unit number if applicable for the physical address.
- Avoid use of abbreviations.
- Eliminate use of periods and # (use Unit or Suite in place of #).
- Proper capitalization and spelling.

### Examples

- Suite A
- Unit 123

Data Element	Level	HMIS Field Location and Name
Zip Code	Agency, Site, Program/Service	Location Information →Addresses →Zip Code

### Description

- Enter the Zip code of the physical address.
- Select 'Apply Zip Code Information' to auto-populate the City, State, and County data from the United States Postal Service (USPS) database.

Data Element	Level	HMIS Field Location and Name
County/Parish	Agency, Site, Program/Service	Location Information →Addresses→ County/Parish

### Description

- After entering the Zip Code Information, select 'Apply Zip Code Information' to auto-populate the City, State, and County data from the United States Postal Service (USPS) database.

Data Element	Level	HMIS Field Location and Name
Area	Not Applicable	Location Information →Addresses →Area

### Description

- We do not use this field for DuPage County resource or HMIS records. Leave this field blank.

Data Element	Level	HMIS Field Location and Name
Landmarks	Agency, Site, Program/Service	Location Information →Addresses →Landmarks

### Description

- Add any additional information if needed to help a person locate this address. This field is optional.
- Avoid use of abbreviations.
- Proper capitalization and spelling.

### Examples

- Go East on Sidney through the industrial park parking lot. Continue through to the end of the lot. The sign for Serenity House and driveway are at the end of the lot. Follow the driveway and signs to the main entrance.

Data Element	Level	AIRS Standards Status	HMIS Field Location and Name
Primary Address	Agency, Site, Program/Service	Not Applicable	Location Information →Addresses

### Description

- Select this box to signify which Address record is the primary location. However, if there is more than one physical address, there should be separate site records created.

### Mailing Address(es)

Data Element	Level	HMIS Field Location and Name
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Address Type	Agency, Site, Program/Service	Location Information →Addresses →Address Type
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**Description**

- Select Mailing for the address type.

Data Element	Level	HMIS Field Location and Name
Street Address (Address Line 1)	Agency, Site, Program/Service	Location Information →Addresses →Street Address

**Description**

- Enter the building or house number followed by the street name for the physical address. Any suite or room number will be entered in the ‘Additional’ field.
- Avoid use of abbreviations.
- Eliminate use of periods.
- Proper capitalization and spelling.

**Examples**

- 421 North County Farm Road
- 123 Candy Lane
- 987 Forest Circle

Data Element	Level	HMIS Field Location and Name
Address Line 2	Agency, Site, Program/Service	Location Information →Addresses →Additional

**Description**

- Enter a suite or unit number if applicable for the physical address.
- Avoid use of abbreviations.
- Eliminate use of periods and # (use Unit or Suite in place of #).
- Proper capitalization and spelling.

**Examples**

- Suite A
- Unit 123

Data Element	Level	HMIS Field Location and Name
Zip Code	Agency, Site, Program/Service	Location Information →Addresses →Zip Code

**Description**

- Enter the Zip code of the physical address.
- Select ‘Apply Zip Code Information’ to auto-populate the City, State, and County data from the United

States Postal Service (USPS) database.

Data Element	Level	HMIS Field Location and Name
County/Parish	Agency, Site, Program/Service	Location Information →Addresses→ County/Parish

**Description**

- After entering the Zip Code Information, select ‘Apply Zip Code Information’, which will auto-populate the City, State, and County data from the United States Postal Service (USPS) database.

Data Element	Level	HMIS Field Location and Name
Area	Not Applicable	Location Information →Addresses →Area

**Description**

- We do not use this field for DuPage County resource or HMIS records. Leave this field blank.

Data Element	Level	HMIS Field Location and Name
Landmarks	Agency, Site, Program/Service	Location Information →Addresses →Landmarks

**Description**

- Leave this field blank for mailing addresses.

Data Element	Level	HMIS Field Location and Name
Primary Address	Agency, Site, Program/Service	Location Information →Addresses

**Description**

- Select this box to signify which Address record is the primary location. However, if there is more than one physical address, there should be separate site records created.

**Phone Number(s) and Types**

Data Element	Level	HMIS Field Location and Name
Types(s)	Agency, Site, Program/Service	Contact Information →Contact Numbers → Description

**Description**

- If no phone number exists, do not create a Contact Number record.
- Provide a one to two-word description for each number to identify the purpose for that number.

### Examples

- Main
- Toll-free
- TDD
- Intake
- Text
- Fax

Data Element	Level	HMIS Field Location and Name
Phone Number(s)	Agency, Site, Program/Service	Contact Information → Contact Numbers → Number

### Description

- If no phone number exists, do not create a Contact Number record.
- The software will automatically format the number to include dashes (-) in between the area code and the phone number itself. Extensions are automatically formatted with an 'x'.
- Include the area code except where an area code does not apply, such as for 988, 211, or 411.
- If there is a number including text, create 2 Contact Number records to include both the numerical and text versions.
- Include extensions when applicable.
- If a number is a 3-digit number like 411, 988, 211, etc., enter the 3-digit number after the 'x' in the extension field, leaving the rest of the number field blank.

### Examples

- 630-123-4567
- 800-GET-HELP
- 800-438-4357
- 312-123-4567 x89
- - - x211
- - - x988

Data Element	Level	HMIS Field Location and Name
Primary	Agency, Site, Program/Service	Contact Information → Contact Numbers → Primary Telephone

### Description

- Select this box to signify which Contact Number record is the primary phone number.

### Contact Personnel

Data Element	Level	HMIS Field Location and Name
Name of Director(s)/Manager(s)	Agency, Site, Program/Service	Contact Information → Contact Personnel → Name

Name(s) of Resource Contact(s)	Agency, Site, Program/Service	Contact Information → Contact Personnel → Name
Other Contact(s)	Agency, Site, Program/Service	Contact Information → Contact Personnel → Name

### Description

- Create a Contact Personnel record for the
  - Director(s)/Manager(s);
  - Resource Contact who will verify the data annually;
  - Agency, Site, Program email only contact;
- Any additional record for each relevant contact to connect someone to this resource.
- Include the First and Last Name of the contact person using proper capitalization.
- If the contact record is for an email address only, enter a brief description of the contact in the name field.

### Examples

- Kathryn Kosloski
- Tariq Khondker
- Agency Email
- Program Email
- Information and Referral

Data Element	Level	HMIS Field Location and Name
Description	Agency, Site, Program/Service	Contact Information → Contact Personnel → Description

### Description

- There may be limited circumstances where this field is used to help identify a contact for specific purposes such as the Resource Contact or Coordinated Entry Contact.
- Otherwise, leave the field blank.
- Abbreviations and acronyms are acceptable.

### Examples

- Resource Contact
- CE Contact
- Coordinated Entry Contact

Data Element	Level	HMIS Field Location and Name
Title of Director/Manager	Agency Site	Contact Information → Contact Personnel → Title

### Description

- Enter the Contact Personnel's official title.
- List out the title in full. Do not use acronyms or abbreviations.



- If the contact record is for an email address only, leave this field blank.

### Examples

- Chief Operating Officer
- Executive Director
- Manager
- Receptionist
- Case Manager

Data Element	Level	HMIS Field Location and Name
Email Address(es)	Agency, Site, Program/Service	Contact Information → Contact Personnel → Email Address

### Description

- Record the email address for the contact personnel listed using proper email formatting.

### Examples

- 123housing@housing.org
- csprograms@dupagecounty.gov
- jane.smith@ccsd123.edu

Data Element	Level	HMIS Field Location and Name
Phone	Agency, Site, Program/Service	Contact Information → Contact Personnel → Phone Number

### Description

- List the phone number for the listed Resource Contact at minimum.
- The software will automatically format the number to include dashes (-) in between the area code and the phone number itself. Extensions are automatically formatted with a 'x'.
- Include the area code.
- Include extensions when applicable.

### Examples

- 630-123-4567
- 800-438-4357
- 312-123-4567 x89

Data Element	Level	HMIS Field Location and Name
Website	Agency, Site, Program/Service	Contact Information → Contact Personnel → Website

### Description

- Leave this field blank. The Agency, Site, Program/Service website will be captured in the program

record.

Data Element	Level	HMIS Field Location and Name
Notes	Agency, Site, Program/Service	Contact Information → Contact Personnel → Notes

### Description

- Leave this field blank.

Data Element	Level	HMIS Field Location and Name
Hide from Provider Profile	Agency, Site, Program/Service	Contact Information → Contact Personnel → Hide from Provider Profile

### Description

- Mark all listed Contact Personnel as hidden by checking the box except when the Contact Personnel is an email only record intended for public reference, such as an Agency, Site, or Program/Service email, then leave the box unchecked.

Data Element	Level	HMIS Field Location and Name
Primary Contact	Agency, Site, Program/Service	Contact Information → Contact Personnel → Primary Contact

### Description

Data Element	Level	HMIS Field Location and Name
If there is more than one Contact Personnel record listed, select which Contact Personnel is the primary contact.		
Receives Email	Agency, Site, Program/Service	Contact Information → Contact Personnel → Receives Email

### Description

- If the Contact Personnel should receive email notifications through the system such as resource record update requests or referral notifications, check this box.
- Otherwise, leave it unchecked.

### Website URL(s) including Social Media

Data Element	Level	HMIS Field Location and Name
Website URL(s) including Social Media	Agency, Site, Program/Service	Provider Profile → Additional Information → Website Address

### Description

- Enter the direct email address for the listed Agency, Site, or Program/Service.
- Remove the 'https://' from the website address.
- Use the 'Click Here to Test URL' to verify that the Website Address is entered correctly and is loading as expected.
- Only enter www. when it is part of the Website Address.
- Our software limits us to one website per record and does not have a dedicated field for social media links.

### Examples

- www.dupagecounty.gov
- 211dupage.gov
- ccsd123.edu
- www.abchousing.org

### Days/Hours of Operation

Data Element	Level	HMIS Field Location and Name
Days/Hours of Operation	Agency, Site, Program/Service	Provider Profile → Additional Information → Hours

### Description

- The record should indicate the administrative hours of the Agency or Site, and the service hours for the Program/Service.
- Service specific hours will be recorded in the Service Details.
- Spell out the day of the week entirely.
- Use a comma to separate the day from the time.
- Time should be formatted as, 00:00 am or 00:00 pm.
- If varying days/times, create a list by hitting return after each.

### Examples

- Monday to Friday, 9:00 am – 5:00 pm
- Monday, 8:30 am - 7:30 pm
- Tuesday and Wednesday, 8:30 am - 5:00 pm
- Monday to Friday, 8:30 am - 4:30 pm
- Tuesday to Friday, 8:30 am – 12:30 pm, 1:30 pm – 5:00 pm
- Closed for lunch, 12:00 pm - 1:00 pm
- 24 hours per day, 7 days per week

### Fee/Payment Options

Data Element	Level	HMIS Field Location and Name
Fee/Payment Options	Program/Service	Provider Profile → Additional Information → Program Fees

### Description

- Leave this field blank. This data will be captured in the service detail to reflect the data per service provided.

### Application/Intake Process

Data Element	Level	HMIS Field Name
Application/Intake Process	Program/Service	Provider Profile → Additional Information → Program Fees

### Description

- Leave this field blank. This data will be captured in the service detail to reflect the data per service provided.

### Eligibility

Data Element	Level	HMIS Field Name
Eligibility	Program/Service	Provider Profile → Additional Information → Eligibility

### Description

- Leave this field blank. This data will be captured in the service detail to reflect the data per service provided.

### Languages Consistently Available

Data Element	Level	HMIS Field Name
Languages Consistently Available	Program/Service	Provider Profile → Additional Information → Languages

### Description

- If only English is readily available, leave blank.
- Include English if other languages are regularly available.
- List all languages regularly available in a line, separating each language with a comma.
- Indicate access to language interpretation services wherever applicable, keeping the phrase consistent throughout database. 'Interpreters for additional languages can be provided.'

### Examples

- Spanish, Mandarin, Italian, English.
- Interpreters for additional languages can be provided.
- Arabic, Cantonese, Polish, English; Interpreters for additional language can be provided.

### Volunteer Opportunities

Data Element	Level	HMIS Field Name
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Volunteer Opportunities	None	Provider Profile → Additional Information → Volunteer Opportunities
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**Description**

- Leave this field blank. We will refer organizations and the public to the Giving DuPage portal.

**Wishlists**

Data Element	Level	HMIS Field Name
Wishlists	None	Provider Profile → Additional Information → Wishlists

**Description**

- Leave this field blank. We will refer organizations and the public to the Giving DuPage portal.

**Physical/Programmatic Access for People with Disabilities**

Data Element	Level	HMIS Field Name
Physical/Programmatic Access for People with Disabilities	Program/Service	Provider Profile → Additional Information → Accessibility

**Description**

- List details that may help or hinder someone’s access to the Agency, Site, or Program for persons with physical disabilities.
- If there is more than one detail to be listed, hit enter between each one.

**Examples**

- Wheelchair access to main entrance via ramp.
- Designated parking spaces.
- No wheelchair access.
- Visual alert system.
- Wheelchair access but call for details.
- Captions available for audio or video content.

**Handicap Access**

Data Element	Level	HMIS Field Name
Handicap Access	Agency, Site, Program/Service	Provider Profile → Additional Information → Handicap Access

**Description**

- Leave at default setting.

**Brochures**

Data Element	Level	HMIS Field Name
Brochures	Agency, Site, Program/Service	Provider Profile → Additional Information → Brochures

### Description

- Leave at default setting.

### Wishlists

Data Element	Level	HMIS Field Name
Wishlists	None	Provider Profile → Additional Information → Wishlists

### Description

- Leave this field blank. We will refer organizations and the public to the Giving DuPage.

### Show On Public Site

Data Element	Level	HMIS Field Name
Show On Public Site	None	Provider Profile → Additional Information → Show On Public Site

### Description

- This field controls whether this record appears on the public online resource database.
- This field should only be checked once the record is finalized at initial creation.
- If the provider is no longer operational or no longer meets Inclusion, then this box should be unchecked.

### Printed Directory

Data Element	Level	HMIS Field Name
Printed Directory	None	Provider Profile → Additional Information → Printed Directory

### Description

- Leave at default setting.

### Is Shelter

Data Element	Level	HMIS Field Name
Is Shelter	None	Provider Profile → Additional Information → Is Shelter

### Description

- Leave at default setting.

### Shelter Requirements

Data Element	Level	HMIS Field Name
Shelter Requirements	None	Provider Profile → Additional Information → Shelter Requirements

#### Description

- Leave this field blank. Shelter details will be captured in the service details of the service record.

### Standards Information

#### AIRS Designation

Data Element	Level	HMIS Field Location and Name
AIRS Designation	Agency, Site, Program/Service	Profile → Standards → AIRS Standards Information → AIRS Designation

#### Description

- If this is the Agency record, select Agency.
- If there are no additional sites and this is the Agency record, choose both Agency and Site.
- If this is a Site record, choose Site.
- Otherwise, leave it blank.

#### Federal Employer Identification Number

Data Element	Level	HMIS Field Location and Name
Federal Employer ID Number	Agency	Profile → Standards → AIRS Standards Information → Federal Employer ID Number

#### Description

- Leave this field blank.

#### Facility Type

Data Element	Level	HMIS Field Location and Name
Facility Type/Type of Organization	Agency, Site, Program/Service	Profile → Standards → AIRS Standards Information → Facility Type/Type of Organization

#### Description

- Leave this field blank.

#### Year of Incorporation

Data Element	Level	HMIS Field Location and Name
Year of Incorporation	Agency, Site, Program/Service	Profile → Standards → AIRS Standards Information → Year of Incorporation

**Description**

- Leave this field blank.

**Legal Status**

Data Element	Level	HMIS Field Location and Name
Legal Status	Agency	Profile → Standards → AIRS Standards Information → Legal Status

**Description**

- Select from the drop-down list to indicate whether the organization is a government entity (city, township, county, state, federal), a non-profit or a commercial/for-profit entity.
- Complete this field for the Agency record only.

**Capacity Type**

Data Element	Level	HMIS Field Location and Name
Capacity Type	Agency, Site, Program/Service	Profile → Standards → AIRS Standards Information → Capacity Type

**Description**

- Leave this field blank.

**Service Capacity**

Data Element	Level	HMIS Field Location and Name
Service Capacity	Agency, Site, Program/Service	Profile → Standards → AIRS Standards Information → Service Capacity

**Description**

- Leave this field blank.

**Provider Maintaining**

Data Element	Level	HMIS Field Location and Name
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Provider Maintaining	Agency, Site, Program/Service	Profile → Standards → AIRS Standards Information → Provider Maintaining
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**Description**

- Select the name of the provider maintaining this record.
- Select ‘My Provider’ unless another provider has been designated as being responsible for this record.

**Licenses or Accreditation**

Data Element	Level	HMIS Field Name
Licenses or Accreditations	Agency, Site, Program/Service	Profile → Standards → AIRS Standards Information → Type of License/Accrediting Bodies

**Description**

- Leave this field blank.

**Fee/Payment Options**

Data Element	Level	HMIS Field Location and Name
Fee/Payment Options	Program/Service	Provider Profile → Additional Information → Payment Methods Accepted

**Description**

- Select all forms of payment accepted.
- This field appears on all Agency, Site, and Program/Service provider records, where service details will capture fee/payment details by service.

**Services**

**Areas Served**

Data Element	Level	HMIS Field Location and Name
Areas Served	Agency, Site, Program/Service	Services → Search Terms Information → Areas Served

**Description**

- Leave this field blank.

**Geographic Area Served**

Data Element	Level	HMIS Field Name
Geographic Area Served	Agency, Site, Program/Service	Services → Search Terms Information → Geography Served

**Description**

- Serves All Geographies should only be set to ‘Yes’ if they serve anyone regardless of location. Otherwise

leave the response at default, 'No'.

- The Geography Served field uses data from the United States Postal Service database.
- Use the following to record the area(s) served -
  - State when they cover an entire state.
  - County/Parish when they serve the entire County.
  - City when they serve an entire City; or
  - Zip to identify by zip code served.
- Add all areas served using one or more of the listed options above.

**Taxonomy Terms for Services**

Data Element	Level	HMIS Field Location and Name
Taxonomy Terms for Services	Agency, Site, Program/Service	Services → Services Provided → Primary Services

**Description**

- Service terms selected from the AIRS taxonomy, which describe the main reason(s) someone would contact this provider for service(s).
- Services that require a referral or current program participation shall not be included.
- Secondary or Occasional services will not be included.
- Include Target Terms only when there is not a service term available to describe the target population.
- Select a single service term that best describes the service being offered.
- Must be at least a level 2 term.
- Review the definition to ensure that this service meets that criterion. If the term is too general, go down a level to find a more appropriate term. If the term is too specific, go up a level to find a more general term.
- Ensure that there is consistency across the site in that the same type of services are all using the same taxonomy term.
- Add additional terms for each distinct primary service provided.

**Examples**

- Agency provides meals to those who are homeless: Basic Needs B → Food B → Meals BD-5000
- Program that assists Veterans in applying for benefits: Criminal Justice and Legal Services F → Benefits Assistance FT-1000 → Veteran Benefits Assistance FT-1000.9000.
- Homeless Shelter for persons under 25 years of age: Basic Needs B → Housing/Shelter BH → Emergency Shelter BH-1800 → Youth Shelters BH-1800.1500-960.

**Taxonomy Terms for Targets**

Data Element	Level	HMIS Field Location and Name
Taxonomy Terms for Targets	Service	Services → Services Provided → Primary Services → Target Populations

**Description**

- Target terms provide additional search criteria allowing a user to further identify resources that are

specific to a particular population.

- Only use a single target term when the service does not provide enough detail to describe who the service is for, the service is not for the general population, and if it is necessary to locate an appropriate service/referral.
- A Target Population is added after a Primary Service is selected.
- Target terms should be used sparingly.

**Examples**

- Rent payment assistance for those over the age of 65 years. Rent Payment Assistance BH-3800.7000 with a Target Term of Older Adults YB-8000.

**Taxonomy Terms for Modalities**

Data Element	Level	HMIS Field Location and Name
Taxonomy Terms for Modalities	Service	Services → Services Provided → Primary Services → Modality

**Description**

- Modalities can be added to further identify a specific type of setting or delivery of service, as in counseling services, when it is not already part of the service term.
- This field will only appear when the service term allows for it, such as counseling related services.
- Modalities are only searchable by call/resource specialists in HMIS.

**Examples**

- Counseling Services for a family. Counseling Services RP-1400 with a Modality term of Family Counseling RF-2000.

**Service Details**

**Special/Notes Funding**

Data Element	Level	HMIS Field Location and Name
Special Notes/Funding	Service	Primary Service → Manage Service Details → Special Notes/Funding

**Description**

- Leave this field blank.

**Description**

Data Element	Level	HMIS Field Location and Name
Description	Service	Primary Service → Manage Service Details → Description

**Description**

- 1-4 sentences/phrases regarding this service
- Short concise sentencing using simple language and no technical terms.
- Do not use acronyms or abbreviations and if it is necessary to do so, spell them out.

- Avoid duplicating data that is already provided in the given data fields.

### Examples

- Counseling for children, teens, and young adults under 25 years of age.
- Drug and alcohol use education and prevention programs for children and youth, as well as their parents.
- Meals provided at multiple locations.
- Staff assists clients apply for and secure public benefits, including filling out applications and accompanying them to appropriate public offices, such as DHS, Social Security Administration, Immigration and Naturalization, and others. Services include translating forms and documents into the native language of the clients.

### Days/Hours of Operation

Data Element	Level	HMIS Field Location and Name
Days/Hours of Operation	Service	Primary Service → Manage Service Details → Days/Hours of Operation

### Description

- Record the hours when the specific service is available.
- If varying days/times, separate the hours with a semi-colon.
- If the service/program is an internet information resource, such as a web-based listing or locator, indicate that it is available 7 days a week, 24 hours a day.

### Examples

- Monday, 8:30 am - 7:30 pm; Tuesday and Wednesday, 8:30 am - 5:00 pm; Friday, 9:00 am – 11:00 am
- Monday to Friday, 9:00 am – 5:00 pm
- 7 days a week, 24 hours a day

### Service Area

Data Element	Level	HMIS Field Location and Name
Service Area	Service	Primary Service → Manage Service Details → Service Area

### Description

- Leave this field blank. The Geography Served will be captured for the service in a different field.

### Eligibility

Data Element	Level	HMIS Field Location and Name
Eligibility	Service	Primary Service → Manage Service Details → Eligibility

### Description

- General eligibility in a linear list separated by a semicolon.

### Examples

- Unsheltered persons; 60 years of age or older; Families with Children; Resident of Wheaton
- Experiencing homelessness; 18 years or older or accompanied by an adult; Must pass safety assessment which includes no history of violent felony or sex offense convictions; Priority given to DuPage County residents.

### Intake/Application Process

Data Element	Level	HMIS Field Location and Name
Intake/Application Process	Service	Primary Services → Manage Service Details→ Intake/Application Process

### Description

- List clear and concise steps in chronological order in a numbered, linear list.
- If there is only one step, leave it un-numbered.
- Items listed should help prepare a client on what to expect and how to prepare from initial contact through application.

### Examples

- (1) Call or walk in for service. (2) Provide required documentation.
- (1) Call Intake during listed hours. (2) Staff will assess needs, verify eligibility, check required documentation, and identify next steps. (3) Those who are missing identification are still welcome to call Intake.

### Required Documents

Data Element	Level	HMIS Field Location and Name
Required Documents	Service	Primary Service → Manage Service Details → Required Documents

### Description

- Record documents that the client should be prepared to bring.
- List the documents in a linear list separated by a semicolon.
- If no documents are required, leave the field blank.

### Examples

- Photo ID; Proof of residence; Proof of income.
- Driver's license or state ID; Proof of income; Utility bill, Mortgage Statement, or Lease Agreement.
- None

### Fees

Data Element	Level	HMIS Field Location and Name
Fees	Service	Primary Service → Manage Service Details → Fees

### Description

- Do not list actual cost data.
- List forms of payment accepted in a linear list, separated by a comma.
- If there are no fees, list “No Fees”.

### Examples

- No Fees, Sliding Scale, Medicaid, Self-pay

### Languages

Data Element	Level	HMIS Field Location and Name
Languages	Service	Primary Service → Manage Service Details → Languages

### Description

- List languages regularly available.
- If English is the only language, leave the field blank. English is assumed to be available.
- List languages in a linear list separated by a comma.

### Examples

- Urdu, Tagalog, Hindi, Gujrati, Polish, Spanish, English

### Availability

Data Element	Level	HMIS Field Location and Name
Availability	Service	Primary Service → Manage Service Details → Availability

### Description

- Leave this field blank.

### Service Offered Outside of Physical Location

Data Element	Level	HMIS Field Location and Name
Service Offered Outside Site Physical Location	Service	Primary Service → Manage Service Details → Service Offered Outside Site Physical Location

### Description

- Select Yes/No button if services are available offsite.

### Available for Directory

Data Element	Level	HMIS Field Location and Name
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Available for Directory	Service	Primary Service → Manage Service Details → Available for Directory
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**Description**

- Select Yes/No button if service is available for a printed directory.

**Available for Referral**

Data Element	Level	HMIS Field Location and Name
Available for Referral	Service	Primary Service → Manage Service Details → Available for Referral

**Description**

- Select Yes/No button if service is available for referral.
- If the service is not available for referral, uncheck the service term in the list of Primary Services Provided to prevent the service from appearing in the resource database searches.

**Available for Research**

Data Element	Level	HMIS Field Location and Name
Available for Research	Service	Primary Service → Manage Service Details → Available for Research

**Description**

- Select Yes/No button if service is available for research purposes.

**Last Verified Date**

Data Element	Level	HMIS Field Location and Name
Last Verified Date	Service	Primary Service → Manage Service Details → Last Verified Date

**Description**

- Enter the date that this resource was last verified.

**Resource Contact Information**

Data Element	Level	HMIS Field Location and Name
Resource Contact Information	Service	Primary Service → Manage Service Details → Resource Contact Information

**Description**

- This data is pulled from the Contact Personnel listed on the Provider Profile.
- Select the appropriate resource contact person.

### Phone Number(s) and Types

Data Element	Level	HMIS Field Location and Name
Number	Service	Primary Service → Manage Service Details → Telephone Numbers → Number

#### Description

- This data is pulled from the Provider Profile. Select the appropriate phone number.

Data Element	Level	HMIS Field Location and Name
Reason Withheld	Service	Primary Service → Manage Service Details → Telephone Numbers → Reason Withheld

#### Description

- Leave this field blank.

Data Element	Level	HMIS Field Location and Name
Phone Types	Service	Primary Service → Manage Service Details → Telephone Numbers → Type

#### Description

- Select the type of phone number provided from the drop-down list.

Data Element	Level	HMIS Field Location and Name
Function	Service	Primary Service → Manage Service Details → Telephone Numbers → Function

#### Description

- Use simple 1-2 words to describe what this number is for.

#### Examples

- Intake
- Main
- Scheduling

Data Element	Level	HMIS Field Location and Name
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Confidential	Service	Primary Service → Manage Service Details → Telephone Numbers → Confidential
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### Description

- Select if this number is a confidential line.

Data Element	Level	HMIS Field Location and Name
Toll-Free	Service	Primary Service → Manage Service Details → Telephone Numbers → Toll-Free

### Description

- Select if this number is toll-free.

### Seasonal Information

Data Element	Level	HMIS Field Location and Name
Seasonal Information	Service	Primary Service → Manage Service Details → Seasonal Information

### Description

- If the service is only offered certain times of the year, add the season's start and end dates to reflect when this service is available.
- Leave the Description field blank.

### Geography Served

Data Element	Level	HMIS Field Location and Name
Geography Served	Service	Primary Service → Manage Service Details → Geography Served

### Description

- Select, 'Import Provider Geography Served' if the geography served is the same as the Agency/Site/Program record.
- Otherwise, select 'Manage Geography Served'.
- The Geography Served field uses data from the United States Postal Service database.
- Use the following to record the area(s) served -
  - State when they cover an entire state.
  - County/Parish when they serve the entire County.
  - City when they serve an entire City; or
  - Zip to identify by zip code served.
- Add all areas served using one or more of the listed options above.

## Summary of Record Administration Data Elements

Data Element	Description
<i>Unique ID Number</i>	Records are auto-assigned a unique Id in our software.
<i>Record Ownership Code</i>	Provider Maintaining is used to identify the provider updating this record, where the software provides meta data that includes provider creating and updating.
<i>Date of Last Annual Verification</i>	This is tracked in the Update History record and is recorded as an Official Update.
<i>Date of Last Interim Change</i>	This is tracked in the Update History record with the Official Update marked as No.
<i>Contact for Last Change</i>	This is tracked in the Update History record as the Organization and Person Requesting Change.
<i>Resource Database Curator for Last Change</i>	This is tracked in the Update History record as the Organization and Person Making Change and is auto filled by the software.
<i>Record Status</i>	This is tracked by the Operational flag on the Provider Profile.
<i>Record Inclusion (e.g. displayed online, in specific portals, directories, etc.)</i>	Operational and Display on Public Site fields control visibility of the record. A record must be marked both Operational and Show on Public Site to appear in both the software and the public resource database. A record only needs to be marked Operational to only appear in the software.

## REVISION SUMMARY

- Added language regarding use of a shared HMIS implementation and the impact on resource data collection in the Introduction.
- Updated Section 2 to be referenced as the Inclusion Plan rather than an Inclusion/Exclusion Plan and included specific examples where we will reference external resource databases in lieu of using our own.
- Added language around the process of submitting new or updates to resource records, the option to enter into a formal partnership agreement with the link to the form, and listed the contact information for the program, program manager, and the Director.
- Updated formatting of the style guide and added more examples and clarifying language.
- Removed requirement to capture intake process, eligibility, and fees in the provider record for this will be captured in the service record.
- Removed the requirement to capture the mailing address if the mailing address is the same as the physical address.